

CURRICULUM COMMITTEE

REQUEST FOR APPROVAL OF A COURSE VIA DISTANCE LEARNING

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Interactive presentation** | X | **Internet presentation** |
|  | **Television presentation** |  | **Internet w/on-campus meetings** | **0-99%** | **on-campus** |

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| --- | --- | --- | --- | --- |
| BA 34 |  | Fundamentals of Investing |  | 3 |
| Course ID# |  | Course Title |  |  Units |

|  |  |  |
| --- | --- | --- |
| Semester/Year: |  | Fall 2010 |
| Day(s)/Time: |  | Arranged |
| Sites: |  | Reedley College/Web |

|  |  |
| --- | --- |
|  | Course has received prior approval in a different distance learning mode (Indicate which mode) |
|  | Interactive presentation |  | Television presentation  | X | Internet presentation |

The reason(s) that this course is being considered for distance learning is/are:

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| --- | --- |
| X | to reach students in remote areas whose attendance at a regular District site is inconvenient. |
| X | to provide a specialty course for students at one or more sites where there is not a sufficient pool of  |
|  | students to warrant traditional classroom instruction. |
| X | to recruit and support students who would not otherwise have initial access to the District. |
|  | to serve the community and business institutions by providing worksite courses for public agencies  |
|  | and private companies whose employees require special training. |

**It is understood that:**

* **The course listed above will follow an existing RC course outline.**
* **The distance learning mode of delivery will not adversely affect the enrollments on campus.**
* **Instructor is aware the course must be in compliance with requirements regarding EIT (Electronic and Information Technology) pursuant to Section 508 of the Rehabilitation Act and provisions of California Government Code Section 11135.**

What **adjustments to the ways in which the course is delivered or presented** to students will be necessary in order to offer it in the distance learning mode? (Add a second sheet if necessary to outline units in the course.)

Use of Blackboard

Supplementary self-paced exercises

Video content (student resources)

Use of Discussion Board What provisions will you make for regular effective contact between instructors and students?

Use of Discussion Boards (mandatory)

Use of e-mail

What other pertinent information should be shared with the committee?

Much of what we will teach in this course lends itself to online instruction.

Signatures:

|  |  |  |  |
| --- | --- | --- | --- |
| Instructor reviewing for distance learning: |  | Date |  |
| Department Chair |  | Date |  |
| Dean of Instruction |  | Date |  |

**Approved by Curriculum Committee:**

|  |  |  |  |
| --- | --- | --- | --- |
| Curriculum Committee Chair |  | Date |  |
| Vice President of Instruction |  | Date |  |

Please attach this cover sheet to the course outline and description of adjustments.

Modified 11/2004



# CREDIT COURSE OUTLINE

##### I. COVER PAGE

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| (1)Course ID: BA 34 |  | (2)Course Title: Fundamentals of Investing |  | (3)Units: 3.0 |

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| --- | --- | --- | --- |
| (4) Lecture / Lab Hours: |  |  | (8)Classification: |
| Semester course Hours per week | Lec hrs:  | 3 |  |
|  | Lab hrs:  |  |  | Degree applicable: | X |
|  Lab will generate \_\_\_\_\_\_ hour(s) per week outside work. |  | Non-degree applicable: |  |
| Short-term course: Hours per course | Lec hrs:  |  |  | Pre-collegiate basic skills: |  |
|  | Lab hrs:  |  |  |  |  |
| Lab will generate \_\_\_\_\_\_ total hour(s) outside work. | (9)RC | Fulfills AS/AA degree requirement: (area) |  |
| (5)Grading Basis: | Grading scale only |  |  | General education category: |  |
|  | CR/NC option  | X |  | Major: | Management, Small Business Management |
|  | CR/NC only |  |  |  |
| (6)Basic Skills Prerequisites: | (10)CSU: | Baccalaureate: | X |
| (11) Repeatable: (A course may be repeated three times) | 0 |
| Basic Skills Advisories: Eligibility for ENGL 125, ENGL 126, and MATH 101 | For Office Use Only |
| New |  | Mod | ✓ | Effective Date: Fall 2008 |
| (7)Subject Prerequisites:  | Replaced by: Date: | DATATEL ID:  |
| SAM Priority: D | TOPS Code: 0506.00 |
| Unit Code: 231510 | Program Status: 2 |
| Subject Corequisites:  | Reporting ID: CCC000113707 | Date Reporting ID Assigned: 20070910 |
| Subject Advisories:  | Total Course Contact Hours : 54 | Course LHE: 3.00 |
| (12)Catalog Description:Understanding and evaluating stocks, bonds, mutual funds, real estate, insurance, collectors’ items, commodities, and other alternatives as investment and retirement planning instruments. Personal portfolio management, retirement plans, lump-sum distributions, and related strategies for investing and retirement planning will be explored.  |

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**II. COURSE OUTCOMES:**

***(Specify the learning skills the student demonstrates through completing the course and link critical thinking skills to specific course content and objectives.)***

Upon completion of this course, students will be able to:

A. examine, analyze, and construct appropriate personal investment portfolios and plan the procedures used in evaluating risk/return as it relates to investments and retirement planning.

B. examine and analyze financial institutions and financial instruments for retirement planning purposes using a variety of information sources.

C. evaluate the time value of money, calculate the effect of inflation of investments, and appraise the effect taxes have on investment/retirement planning using modern investment analysis techniques.

D. examine the differences between fundamental and technical analysis of investment instruments and formulate appropriate analysis models for public and private institutions.

E. contrast and compare investment planning objectives as they relate to the timeline of retirement with an emphasis on age- appropriate investment instruments.

F. successfully manage a stock portfolio.

G. understand why investors succeed or fail in the various financial markets and use ratio analysis to analyze financial statements.

**III. COURSE OBJECTIVES:**

 ***(Specify major objectives in terms of the observable knowledge and/or skills to be attained.)***

In the process of completing this course, students will:

A. understand and demonstrate the concept of risk and return.

B. locate, analyze, and utilize sources of information available to investors.

C. identify, compare, and contrast the mechanics and concepts of investment analysis.

D. identify, appraise, and examine the important differences among financial instruments/institutions.

E. recognize and differentiate significant factors in investing analysis.

F. manage an investment portfolio.

G. identify, analyze, and evaluate financial statements.

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**III. COURSE CONTENT OUTLINE**:

A. Basics of Personal Investing

B. Risk/Return and diversification

C. Investing in Common Stocks

D. Bonds and Preferred Stocks

E. Investing in Mutual Funds

F. Options and Features

G. Alternative Investments to Cash

H. Investing for the Future

I. Investment Timing and Technical Tools

J. Money and Markets (local, national, global)

K. Predicting Economic Conditions

L. Personal Investing Guidelines and E-trading

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**V*.* APPROPRIATE READINGS**

***Reading assignments may include but are not limited to the following:***

A. Sample Text Title:

 Personal Finance: An Integrated Planning Approach, 7/E – Winger/Frasca, Prentice Hall, 2007.

B. Other Readings:

|  |  |
| --- | --- |
| X | Global or international materials or concepts are appropriately included in this course |
|  | Multicultural materials and concepts are appropriately included in this course. |

If either line is checked, write a paragraph indicating specifically how global/international and/or multicultural materials and concepts relate to content outline and/or readings.

The world of finance and investment is worldwide. Investment opportunities must be explored and evaluated in relationship to risk and return regardless of where they may originate. Opportunity costs and political risks must also be weighed to create an effective investment plan.

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**V. METHODS TO MEASURE STUDENT ACHIEVEMENT AND DETERMINE GRADES:**

Students in this course will be graded in at least one of the following four categories. Please check those appropriate. A degree applicable course must have a minimum of one response in category A, B or C.

|  |
| --- |
| **A. Writing** ***Check either 1 or 2 below*** |
| x | ***1. Substantial writing assignments are required. Check the appropriate boxes below and provide a written description in the space provided.*** |
|  | ***2. Substantial writing assignments are NOT required. If this box is checked leave this section blank. For degree applicable courses you must complete category B and/or C.*** |
|  | a. essay exam(s) |  | d. written homework |
| X | b. term or other papers(s) | X | e. reading reports |
|  | c. laboratory reports |  | f. other (specify)  |

***Required assignments may include but are not limited to the following:***

1. Analyze a company

2. Analyze investment opportunities

|  |
| --- |
| **B. Problem Solving**1. Computational or non-computational problem-solving demonstrations, including: |
|  | a. exam(s) |  | d. laboratory reports |
|  | b. quizzes |  | e. field work |
|  | c. homework problems | x | f. other (specify) ***investment simulation*** |

***Required assignments may include, but are not limited to the following:***

1. Investment simulation involving the NYSE.

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| **C. Skill** demonstrations, including: |
|  | a. class performance(s) |  | c. performance exam(s) |
|  | b. field work |  | d. other (specify |

***Required assignments may include, but are not limited to the following:***

|  |
| --- |
| **D. Objective** examinations, including: |
| X | a. multiple choice |  | d. completion |
| X | b. true/false |  | e. other (specify)  |
|  | c. matching items |  |

**COURSE GRADE DETERMINATION:**

Description/Explanation: Based on the categories checked in A-D, it is the recommendation of the department that the instructor’s grading methods fall within the following departmental guidelines; however, the final method of grading is still at the discretion of the individual instructor.The instructor’s syllabus must reflect the criteria by which the student’s grade has been determined. (A minimum of five (5) grades must be recorded on the final roster.)

If several methods to measure student achievement are used, indicate here the approximate weight or percentage each has in determining student final grades.

Written/simulation assignments will constitute 30 percent of the student’s final grade and exams/quizzes 70 percent.

 **FOR DEGREE APPLICABLE COURSES**

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# VII. EDUCATIONAL MATERIALS

For degree applicable courses, the adopted texts, as listed in the college bookstore, or instructor-prepared materials have been certified to contain college-level materials.

|  |  |
| --- | --- |
| Validation Language Level (check where applicable): | College-Level Criteria Met |
|  | Yes | No |
|  Textbook | X |  |
|  Reference materials | X |  |
|  Instructor-prepared materials | X |  |
|  Audio-visual materials |  |  |

|  |
| --- |
| Indicate method of evaluation: |
|  Used readability formulae (grade level 10 or higher) |  |
|  Text is used in a college-level course | X |
|  Used grading provided by publisher |  |
|  Other: (please explain; relate to Skills Levels) |  |

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| --- | --- | --- |
| ***Computation Level*** (Eligible for MATH 101 level or higher where applicable) | X |  |
| Content |
|  Breadth of ideas covered clearly meets college-level learning objectives of this course | X |  |
|  Presentation of content and/or exercises/projects: |
|  Requires a variety of problem-solving strategies including inductive and deductive reasoning. | X |  |
|  Requires independent thought and study | X |  |
|  Applies transferring knowledge and skills appropriately and efficiently to new situations or  problems. | X |  |
| **List of Reading/Educational Materials**1. Text (sample):Personal Finance: An Integrated Planning Approach, 7/E – Winger/Frasca, Prentice Hall, 2007. |
| **Comments:** |
|  | This course requires special or additional library materials (list attached). |
|  | This course requires special facilities:  |

**FORM A**

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| --- | --- | --- | --- |
| **TARGET COURSE**  | **BA 34** |  | **Fundamentals of Investing** |
|  | Number |  | Title |

BASIC SKILLS ADVISORIES PAGE The skills listed are those needed for “eligibility for English 125, 126, and Math 101.” These skills are listed as the outcomes from English 252, 262, and Math 250. In the right hand column, list at least three major basic skills needed at the beginning of the target course and check off the corresponding basic skills listed at the left.

|  |  |
| --- | --- |
| Math Skills (eligibility for Math 101)(as outcomes for Math 250) X Performing the four arithmetic operations on whole numbers, arithmetic fractions, and decimal fractions. X Making the conversions from arithmetic fractions to decimal fractions, from decimal fractions to percents, and then reversing the process. X Applying the concepts listed above to proportions, percents, simple interest, markup and discount. Applying the operations of integers in solving simple equations. Converting between the metric and English measurement systems | Ability to setup and compute common ratiosAbility to convert fractions and decimals into percentagesAbility to perform basic math operations on financial statements  |
| Reading Skills (eligibility for English 126) (as outcomes for English 262)  X Using phonetic, structural, contextual, and dictionary skills to attack and understand words. X Applying word analysis skills to reading in context. X Using adequate basic functional vocabulary skills. X Using textbook study skills and outlining skills. X Using a full range of literal comprehension skills and basic analytical skills such as predicting, inferring, concluding, and evaluating.  | Ability to read a college-level textbookAbility to read case studiesAbility to compare and contrast differing solutions involving investment objectives and risk/return models |
| Writing Skills (eligibility for English 125)(as outcomes for English 252) X Writing complete English sentences and avoiding errors most of the time. X Using the conventions of English writing: capitalization, punctuation, spelling, etc. X Using verbs correctly in present, past, future, and present perfect tenses, and using the correct forms of common irregular verbs. X Expanding and developing basic sentence structure with appropriate modification.­ X Combining sentences using coordination, subordination, and phrases. X Expressing the writer's ideas in short personal papers utilizing the writing process in their development. | Ability to write out explanations of interpretations and decisionsAbility to spell and define correctly the vocabulary common to the investment environmentAbility to use correct verb tenses, punctuation, and capitalization when writing investment analyzes |

Check the appropriate spaces.

 X Eligibility for Math 101 is **advisory** for the target course.

 X Eligibility for English 126 is **advisory** for the target course.

 X Eligibility for English 125 is **advisory** for the target course.

*If the reviewers determine that an advisory or advisories in Basic Skills are all that are necessary for success in the target course, stop here, provide the required signatures, and forward this form to the department chair, the appropriate associate dean, and the curriculum committee.*

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| --- | --- | --- | --- |
| Content review completed by |  | Date |  |