**PAC Form Item #3: Mapping**

**• New Course: Map course to its program(s).**

**• Existing Course: If SLOs have changed, complete worksheet(s).**

**Instructions:**

* On the worksheet, identify the course.
* Review the learning goals/SLOs (referred to as Degree Learning Outcomes on the worksheet) for the Financial Services major. The goals are listed, in brief on the worksheet however they should be reviewed in detail at: <http://cbaweb.sdsu.edu/assets/files/assessment/goals/2012/BSBA-financial-services.pdf>.
* If a given goal/SLO is a primary focus of the course, indicate this by placing an “X” in the Primary Focus column.
	+ Note: *A topic that is part of a course is not necessarily the primary focus of the course. For example, “Design hedging strategies to manage market risk” may be a primary focus of FIN 327 (Investments). Hedging strategies may be introduced/covered in a course such as FIN 323 (Fundamentals of Finance) but is not a primary focus of that course.*
* Consider whether some part of the course **Introduces**, **Reinforces**, and or **Applies** the goal/SLO being considered. If it applies, further consider whether the application takes place at the individual student level or in a group. Place an **“I”,** an **“R”,** an **“AI”** and/or an **“AG”** in the boxthat corresponds to the goal or SLO.
	+ *Please use the following definitions:*
		- *Introduces:* ***(I)*** *A new concept, likely a student’s first exposure*
		- *Reinforces:* ***(R)*** *Furthering explanation and/or understanding of a previously introduced concept.*
		- *Applies (Individually):* ***(AI)*** *Requires “hands-on” activity of some type that is evaluated at an individual student level.*
		- *Applies (In a Group):* ***(AG)*** *Requires “hands-on” activity of some type that is completed by a group of students working together and is evaluated at the group level.*
	+ *It is okay to place multiple letters in one box if the course does more than one thing. It is also okay to leave the box blank if the course does not relate to the goal/SLO. Please think concretely about the course’s SLOs, specific lectures and activities such as assignments, exercises, and exams. It is less helpful to draw a general conclusion that “everything I do in my class contributes to critical thinking [for example]” than to think in terms of a specific assignment that requires students in the class to demonstrate critical thinking skills and is evaluated based on the level of those skills demonstrated. It is* ***not*** *expected that a single course will contribute to all learning goals/SLOs nor cover all levels (introducing, reinforcing, applying). Remember that each course is one piece of a broader program. Programmatic learning goals/SLOs are accomplished by the introduction, reinforcement, and application of material over the range of courses in the program. It isn’t all expected to happen in one course!)*

**Financial Services Worksheet**

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| --- | --- | --- |
| **Course:**  |  |  |
| **Financial Services Major Degree Learning Outcomes** | **Primary****Focus?** | **I, R, AI, AG?** |
| Describe the dimensions of performance and risk relevant to financial services companies. |  |  |
| Calculate contemporary financial measures of performance and risk. |  |  |
| Describe contemporary managerial risk management oversight processes. |  |  |
| Explain how the financial services component industries (insurance, banking, securities, real estate and financial planning) interact. |  |  |
| Describe the various financial products, services, and strategies offered by the variety of financial services institutions. |  |  |
| Evaluate financial products and strategies offered by the variety of financial services institutions for suitability and appropriateness in meeting consumer needs. |  |  |
| Describe measures of risk and approaches to managing risk. |  |  |
| Apply valuation techniques. |  |  |
| Explain the structure of the financial markets. |  |  |
| Analyze the impact of tax and pension law on various financial decisions including accumulation of wealth. |  |  |
| Identify conflicts of interest between market participants and between principal and agent. |  |  |
| Evaluate the economic environment and the impact of governmental economic policies on consumers and financial services firms. |  |  |
| Explain how laws and regulations governing the operation of financial service firms and of the financial planning profession affect clients. |  |  |
| Describe the impact that financial innovation, advances in technology, and changes in regulations has had on the structure of the financial services industry. |  |  |
| Analyze the impact of pension law on various financial decisions including accumulation and transfer of wealth. |  |  |
| Design hedging strategies to manage market risk. |  |  |
| Evaluate an individual’s assets for efficient distribution to heirs or through charitable gifts. |  |  |
| Design and evaluate employee benefits plans and aid individuals in making choices among current plan elections. |  |  |
| Design and evaluate portfolios of securities and asset classes aimed at achieving personal goals. |  |  |
| Prepare a plan for efficient wealth creation and management including planning for cash and debt management, investing, insurance, retirement, education needs, incapacity, and efficient wealth transfer. |  |  |