Florida Institute of Technology

REQUEST TO CHANGE THE REQUIREMENTS FOR A COURSE

Any change, addition or removal of any restriction, or change in credit hours or availability for a course requires this form, accompanied by any supporting documentation, be completed and approved as indicated below.

COLLEGE College of Business

DEPARTMENT College of Business

REQUEST IS FOR CHANGE IN COURSE_prefix B U S 3 5 1 6 ERP Systems Course Title

TO BE INCLUDED IN 20_18 /20_19 CATALOG
Course changes are effective beginning with the fall term in which they appear in the University Catalog.

IS REQUEST FOR A CHANGE IN THE NAME LISTED ABOVE? [] Yes [x] No If yes, requested name________________________

IS REQUEST FOR A CHANGE IN CREDITS FOR COURSE LISTED ABOVE? [] Yes [x] No If yes, current credits____________ requested credits____________

IS REQUEST TO CHANGE RESTRICTIONS FOR COURSE LISTED ABOVE? [] Yes [x] No If yes, please check all that apply:
- Add [x] Remove [ ] Prerequisite [ ] Corequisite [x] BUS prefix 3504 Number and or
- Add [ ] Remove [ ] Prerequisite [ ] Corequisite [ ] Sophomore Standing and or
- Add [ ] Remove [ ] Other Restrictions* [ ] Yes [x] No If yes, please use box below:

*Other restrictions may include changing the grade mode (P/F, S/U, A-F, EIU), desaculating a course already in the system, majors or class levels restricted from registration, or other restrictions.
Please enter the complete prerequisite/restriction list as it should appear if this change is approved:

Requirement: Sophomore Standing

[ ] Yes [x] No Is this request for the course to be used to measure program-level student learning outcomes?
[ ] Yes [x] No Is this request for the course to satisfy the scholarly inquiry requirement? If yes, attach "O" materials for review.
[ ] Yes [x] No Will this change impact any existing programs? If yes, attach "Changing Graduation Requirements" form for each program that is impacted.

APPROVALS: Once appropriate department approvals are completed, submit to the Office of Graduate Programs, or Undergraduate Curriculum Committee Chair for placement on agenda.

1) [Signature] [Date] Chair, Graduate Council [Date]
2) [Signature] [Date] OR
3) [Signature] [Date] Chair, Undergraduate Curriculum Committee [Date]

CATALOG & CURRICULUM MANAGER’S USE ONLY

SCACRSE SCADRTL SCAREQ

SCBASE SCARRES ACALOG Operator Initials [Date]

DISTRIBUTION

Original - Catalog & Curriculum Manager
Copy - Academic Unit

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RGR 254-1015
Florida Institute of Technology

ADDING A NEW COURSE TO THE CURRICULUM

If this is a request for reactivation of a course in the system, ☐ Yes ☐ No

New courses are available beginning with the fall term in which they appear in the University Catalog.

SUBJECT BUSINESS COURSE NO.* 3210 CREDIT HOURS 3 ACADEMIC YEAR TO BE ADDED TO THE FILE Fall 2018 (e.g., CSE) (e.g., 1301)

*Justify level if 1000-level and no co- or prerequisites

CLASS HOURS 45/semester LECTURE HOURS 45/semester LAB HOURS 0/semester CONTACT HOURS (CEU ONLY) N/A

DEPARTMENT Business SCHEDULE TYPE Lecture (A) (e.g., Biological Sciences)

☐ COLLEGE OF AERONAUTICS – 23 ☐ COLLEGE OF PSYCHOLOGY AND LIBERAL ARTS – 25
☐ NATHAN M. BISK COLLEGE OF BUSINESS – 24 ☐ COLLEGE OF SCIENCE – 26

COMPUTER TITLE Intermed Financial Mgmt Restricted to 25 characters, including spaces

This course will be entered into the system as: B-Level ☐ Cross-Listed ☐ Dual-Numbered ☐ Full-Load ☐ None of these/Standard Listing

CATALOG TITLE Intermediate Financial Management

CATALOG DESCRIPTION OF COURSE Restricted to 350 characters, including spaces

Presents financial theory in a decision-making context. Emphasizes corporate valuation (planning, forecasting, cost of capital), project valuation (capital budgeting, cash flows, risk), strategic financing decisions (optimal capital structure), tactical financing decisions and working capital management.

This description has been approved by the catalog office

In addition, please attach a course syllabus and/or more detailed description.

GRADES TO BE ISSUED

☐ A, B, C, D, F ☐ A, B, C, D, F, CEU/Audit
☐ CEU ☐ S, U
☐ P, F ☐ Other

ADDITIONAL RESTRICTION ☐ and ☐ or

(e.g., Major, Class Level, Department Head Approval)

If this course replaces a course currently offered in BANNER, please indicate old course information and the date/term the course may be removed from the system.

SUBJECT Alpha Prefix (e.g., CSE) COURSE NO. (e.g., 1301) TERM TO INACTIVATE

☐ Yes ☐ No Will this course be used to measure program-level student learning outcomes? If yes, review and signature required.

☐ Yes ☐ No Will this course be used to satisfy the scholarly inquiry requirement? If yes, attach "Q" materials for review.

☐ Yes ☐ No Will this course impact any existing programs? If yes, attach "Charging Graduation Requirements" form for each program impacted.

☐ Yes ☐ No Will this course be used to satisfy the Cross Cultural (CC) requirement? If yes, attach confirmation memo from QEP2 Committee.

APPROVALS: On completion of description and course number verification, affix appropriate signatures as indicated, and submit to the Office of Graduate Programs, or Undergraduate Curriculum Committee Chair for placement on agenda.

Or

Date

Chair, Graduate Council

Date

Chair, Undergraduate Curriculum Committee

**Chair, Academic Programs Assessment Committee

CATALOG & CURRICULUM MANAGER

These changes/additions have been made for the University Catalog and entered into the BANNER term named above.

Catalog & Curriculum Manager

REGISTRAR’S USE ONLY

SCACRSE __________ SCADERL __________ SCAPREQ __________ SCABASE __________ ACATALOG __________

SCARRS __________ CIP Code 520899 Operator Init. Date

Date

Florida Institute of Technology • Office of the Registrar

150 West University Boulevard, Melbourne, FL 32901-6975 • 321-674-8114 • Fax 321-674-7827

RGR-030-1217
Nathan M. Bisk College of Business  
BUS 3XXX Intermediate Financial Management  
Babcock Oaks 145  
Section 1: M-W: 2:00 – 3:15  
SPRING 2018

SYLLABUS

Instructor:  
Meeting Times:  
Class Location:  
Office Location:  
Phone:  
Office hours:  
Email:

PRE-REQUISITE:  
BUS3401: Corporate Finance

READING MATERIALS:  
Articles, as assigned

SUGGESTED OUTSIDE READING  
Wall Street Journal, Yahoo Finance, Bloomberg Finance  
Knowing what’s going on daily in the world of finance is a great first step to understanding the world of business. Get in the habit of reading something financial EVERYDAY and learn to track the financial performance of firms, industries, & markets.

COURSE DESCRIPTION  
This course presents financial theory in a decision-making context. The course will emphasize Corporate Valuation (planning, forecasting, the cost of capital), Project Valuation (capital budgeting, cash flows and risk), Strategic Financing Decisions (optimal capital structure), Tactical Financing Decisions, and Working Capital Management.
COURSE COMPETENCIES

A. College of Business

1. Professional Competence
   a. Specialized business knowledge
   b. Analytical
   c. Logical thinking
   d. Conceptual thinking
   e. Application of theory and concepts

2. Communication
   a. Verbal and written

3. Integrity
   a. Openness
   b. Honesty

4. Interpersonal Competence
   a. Respect
   b. Preparedness
   c. Presentation

B. BUS 3XXX

1. Diagnostic use of concepts – Use theories and concepts to evaluate and solve intermediate level financial analysis problems

2. Interpersonal communication - Effective use of verbal and written communication skills as well as strong command of body-language (self presentation)

3. Accountability and reliability – Students will not play the victim. Students will develop a professional approach to assignments, homework, and teamwork. Students will be responsible for themselves and if applicable, their team

4. Decision Making – Students will learn to make decisions based on the logic facts presented and the assumptions available.

5. Conceptualization – Look for the “big picture”. Students will learn to think in terms of an issue or problem to be solved and not focus strictly on financial technique.

6. Enthusiasm – Have fun!

COURSE OBJECTIVES

This course, designed specifically for finance majors, builds upon the introduction of finance offered in BUS 3401. It aims to provide the student with an examination of financial theory as applied to business management. The course will emphasize Corporate Valuation (planning,
forecasting, the cost of capital), Project Valuation (capital budgeting, cash flows and risk), Strategic Financing Decisions (optimal capital structure), Tactical Financing Decisions, and Working Capital Management.

In BUS 3XXX, we present theory in a decision-making context designed to motivate students by showing them how theory can lead to better decisions. The primary focus is on value creation in the corporate world and we will apply value creation thinking into every decision. Further, the emphasis on applications makes the course usable as a reference both for case courses and for “real world” decision-making.

Specifically, students will learn how to explain the primary goal of financial management and to relate this goal to societal goals and considerations.

**STUDENT LEARNING OUTCOMES**

Students will learn the specialized body of knowledge relating to the course content listed in this syllabus. By the end of the course, students will demonstrate a practical understanding of the specific issues and problems encountered in financial decisions, and have the ability to apply critical thinking and problem solving skills to make decisions based on that understanding. Students will demonstrate the ability to communicate ideas effectively in both in written and verbal form. Specific student learning outcomes include:

1. Describe in detail the 5 areas necessary for Time-Value-of-Money (TVM) decisions
2. Complete valuation of corporate bonds, U.S. Treasuries, and municipal bonds
3. Develop complete financial planning (pro-forma) financial statements
4. Complete fundamental firm level valuation and determine stock prices based on expected future cash flows
5. Develop accurate cost of capital (WACC) models
6. Describe the optimum capital structure at the firm level
7. Develop accurate capital budgeting decision models (Project level)

**STUDENT ASSESSMENT CRITERIA**

Overall student performance will be assessed using several methods. There will be one mid-term exam and one final exam. These exams will be comprised of multiple choice and short-answer questions. Additionally, homework will be assigned from each chapter on a weekly basis. Finally, a team based, comprehensive case analysis will be required to incorporate all applicable knowledge areas.

Note on Case Analysis: You will work in teams of 3-5 people and each individual will be required to submit a written case analysis. There is also a peer-review form that must be completed. This ensures equal participation from all team members and will impact the case score for each team member.

**Chapter Homework**

Homework is assigned for each chapter to demonstrate understanding of the concepts presented. It is due at the beginning of class and will be the subject of discussion at the
beginning of each session. Students will be asked to present their results to lead the discussion.

Exams – 3
There will be two examinations, one in the middle of the semester and one near the end of the semester. They will be rigorous, closed book, and comprehensive. A single page of notes will be permitted.

Final Paper/Case
Each student group will summarize the work done on the case in a 2-3 page, double-spaced paper. The paper will be due as scheduled at which time each student group will give a PowerPoint presentation.

Participation
This class will be both lecture and interactive dialog. Therefore, it is expected that students will be prepared to discuss relevant concepts and their applications each week.

**GRADING**

Homework 25%

Examinations
Quiz (TBD) 10%
Participation (1) 10%
Mid-term (exams) (2 @ 15%) 30%
Final (1) 15%
Case Analysis
(Presentation & Paper) (1) 15%
Case Peer Review (1) 5%

Scale
A 100 -95
A- 94 -90
B 89 -85
B- 84 -80
C 79 -75
C- 74 -70
D 69 -65
D- 64 -60
F 59 -
This course is designed to help the student learn and become proficient in the basics of fundamental analysis and security valuation. It is assumed that this is the objective of each student in the class and that each one wants to learn, otherwise you would not have applied for admission. This is to be a worthwhile experience for everyone involved.
METHODOLOGY
Students will read all assigned materials prior to class. These materials will be the subject of interactive class dialogue in which students will present the major subjects, provide an interpretation of them, and offer insights from previous experience. Throughout each class, there will be questions posed for the students, and it is expected that each one will participate to the degree that s/he wishes. Part of the grade for this course will depend on it.

Throughout each dialogue, there will be conversation about the discussion questions that conclude each chapter in the text. Thus, students will be asked to apply what they read in preparation and what they learned in class. The main objective is to assist in the learning of interpretive skills as well as computing skills and then to communicate about the specific issues at hand. Students will learn “what the numbers mean” and be able to effectively present factual data in a meaningful manner.

The course will conclude with a “real-world” case, in which it is expected that students will incorporate teamwork skills, case analysis skills, and presentation skills at a professional level. This case experience will be used to help students attain higher cognitive levels and to improve post course retention of material. This will be a “real world” experience and the highest levels of professionalism will be expected. Each student will be assigned to a group for the purpose of in-depth diagnostic analysis. The skill and knowledge gained from this exercise will be evaluated through a written assignment and an oral presentation.

CLASS POLICIES
1. Attendance and participation are essential for maximum educational advantage and will be expected. Responsibility for all course material rests entirely with each student, whether or not s/he chooses to attend class.

2. Students will be responsible for all materials - even for what is presented when absent. There is a very good chance that those who miss class will be called upon in the next class. It will be advantageous to have the phone numbers and e-mail addresses of the other students. Get them now!

3. It is the prerogative of the instructor to administer unannounced quizzes as part of the student evaluation process and to pass judgment on the merits of all assignments and other requirements. Make-up quizzes will not be administered.

4. It is assumed that each student will have read the text materials before class. Therefore, dialogue will attempt to supplement and expand on the material in the text.

5. As a rule, the format of the class will feature dialogue between all participants. This will be a participative class with student participation integrated with lecture. That means an emphasis on preparation. Students will also be expected to ask questions about issues and subjects, which are unclear.
6. All assignments are due at the beginning of class. Any homework turned in more than 15 minutes after class has started will be considered late and will be penalized 20%. No homework will be accepted after midnight of the due date without special arrangements.

7. Cheating of any kind will result in an automatic "F" and dismissal from the class, in accordance with the procedures outlined in the FIT University Student Handbook.

8. Any citations should be referenced according to business writing standards (APA format). Plagiarism is the intentional or unintentional presentation of someone else's words, ideas, or data as one's own work. In the event the faculty member deems the plagiarism is unintentional, he/she shall ask the student to rewrite the assignment. In the event the faculty member believes the plagiarism is willful, the sanctions in FIT University Student Handbook will apply, including documentation of the circumstance for inclusion in the student's personal file. If the work of another is used, acknowledgment of the original source must be made through a recognized reference practice, and, if verbatim statements are included, through quotation marks as well. To assure proper crediting, a student will acknowledge the work of others:

   A. Whenever one quotes another person's actual words.

   B. Whenever one uses another person's idea, opinion, or theory, even if it is paraphrased completely in one's own words.

   C. Whenever one borrows facts, statistics, or other illustrative materials -- unless the information is of such common knowledge as not to be questioned.

   D. Through the use of the APA standard.

   A grade of "0" will be given on any assignment for which plagiarism has been established.

9. In case students are having problems, please do not hesitate to talk with me early -- failure to do so usually compounds things later. Resources are available and I am personally committed to your success.

STUDENTS WITH DISABILITIES
For any students who have specific physical, psychiatric, or learning disabilities and who require special accommodations, please let me know early in the semester so that your learning needs can be met appropriately. It is your responsibility to provide documentation of your disability to Classroom Support Services.
STUDENT RESPONSIBILITIES

1. Students will be responsible for all assignments, taking exams, and all notes. In other words, if you miss class, you are responsible for what you missed.

2. Students are encouraged to work on their homework with others. However, YOUR WORK IS YOUR OWN!! Duplicate copies are completely unacceptable. If duplicate copies or one copy of the same work is submitted, the homework for all students involved will be assigned a grade of zero, at a minimum, unless evidence of a violation of the academic integrity policy is present. If you do work together, indicate whom you have worked with at the top of the first page of the homework. Each and every student is responsible for understanding the homework.

3. Show all work with homework problems. Except when stated otherwise, all homework problems assignments must be typed. Showing how you arrived at the answer can be done in pencil. All work must be legible in order to be graded. No value will be given to work that can’t be read.
# SCHEDULE AND ASSIGNMENTS

<table>
<thead>
<tr>
<th>Week</th>
<th>Materials</th>
<th>Primary Topic</th>
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| Jan 5 | Introductions, Course overview  
Financial Fundamentals review  
PV, FV, NPV, TVM, TVM, TVM  
Chapter 1 | |
| 12   | Chapter 2: Risk and Return | |
| 19   | Chapter 4 - 5: Bond and Stock valuation | |
| 26   | Chapter 7 - 8: Financial Statements and Financial Ratios | |
| Feb 2 | Chapter 7 - 8: Financial Statements and Financial Ratios | |
| 9    | Exam #1 (Celebration #1) (Chapter 1 – 8: Not including 3 & 6)  
Chapter 9: Financial Forecasting | |
| 16   | Chapter 9 - 10 Cases and Review | |
| 23   | Chapter 10: Cost of Capital | |
| Mar 2 | SPRING BREAK (NO CLASS) | |
| 9    | Corporate Valuation Chapter 11  
(Corporate Valuation) | |
| 16   | Corporate Valuation Chapter 11  
Exam (Celebration #2) (Chapter 1 – Chapter 11)  
(Corporate Valuation) | |
| 23   | Project Valuation Chapter 12  
(Capital Budgeting)  
Project Valuation Chapter 12  
(Review and Problems) | |
| 30   | Project Valuation Chapter 13  
(Capital Budgeting)  
Project Valuation Chapter 13  
(Review and Problems) | |
| April 5 | Project Valuation Review Chapter 12 - 13  
(Review and Problems)  
Assign Case Analysis – Form Groups | |
| 13   | Real Options (Chapter 14)  
(Real Options) | |

1The schedule and the assignments are subject to revision should there be good reason. I will reserve the right to make any such changes and will make them known in class at least a week before they take effect.
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
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<tr>
<td>20</td>
<td>Strategic Financial Decisions Chapter 15 (Capital Structure)</td>
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<tr>
<td>27</td>
<td>Case Presentations</td>
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<td></td>
<td>Review for Final Exam - Comprehensive - Chapter 1 - Chapter 15 (Inclusive of</td>
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<td></td>
<td>everything we’ve covered in class. Primarily focus on topics covered since the</td>
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<td></td>
<td>last exam)</td>
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<tr>
<td>May 4</td>
<td>Final Exam (Celebration #3)</td>
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<tr>
<td>Week</td>
<td>Homework Assignment**</td>
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</tr>
<tr>
<td>1</td>
<td>TVM Review Handout</td>
</tr>
<tr>
<td>2</td>
<td>Ch 2: Problems 3, 4, 12</td>
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<tr>
<td>3</td>
<td>Ch 4: Problems 1 – 6, 10</td>
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<tr>
<td>4</td>
<td>Ch 5: 14, 15</td>
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<tr>
<td>5</td>
<td>Ch 7: 8, 12</td>
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<tr>
<td>6</td>
<td>Ch 8: mini case a, b, c, d, e, f, &amp; i</td>
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<tr>
<td>7</td>
<td>Ch 9: Problems 4, 7, 8</td>
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<td>8</td>
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<td>9</td>
<td>Ch 10: Problems 1, 2, 8, 15</td>
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<td>10</td>
<td>Ch 11: Problems 2, 7, 8, 9</td>
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<td>11</td>
<td>Ch 12: Problems 1, 10, 12, 21</td>
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<tr>
<td>12</td>
<td>Ch 13: Problems 4, 5, 7 <strong>Final Exam Case Assignment</strong></td>
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<tr>
<td>13</td>
<td>Chap 15: Problems 7, 8</td>
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<tr>
<td>14</td>
<td>Mini-Case</td>
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<tr>
<td>15</td>
<td>Final Exam Review (Handout)</td>
</tr>
</tbody>
</table>

** Homework assignments may be delivered and administered electronically via the FIT Canvas system. I’ll make any necessary announcements no less than 1 week prior to the assignment.
Florida Institute of Technology

Adding a New Course to the Curriculum

This is a request for reactivation of a course in the system.  [ ] Yes [ ] No

New courses are available beginning with the fall term in which they appear in the University Catalog.

Subject B Us Course No. 4210 Credit Hours 3 Academic Year to be Added to the File Fall 2018
(e.g., CSE) (e.g., 1301)

*Justify level if 1000-level+ and no co- or prerequisites

Class Hours 45/semester  Lecture Hours 45/semester  Lab Hours 0/semester  Contact Hours (CEU only) N/A

Department Business

Schedule Type Lecture (A)
(e.g., Lecture, Lab or Special Topics/Project)

[ ] College of Aeronautics – 23
[ ] College of Psychology and Liberal Arts – 25
[ ] Nathan M. Bisk College of Business – 24
[ ] College of Science – 26
[ ] College of Engineering and Computing – 01

Computer Title: Financial Case Mgmt

This course will be entered into the system as: [ ] Bi-Level [ ] Cross-Listed [ ] Dual-Numbered [ ] Full-Load [ ] None of these/Standard Listing

Catalog Title: Financial Case Management

Catalog Description of Course: Restricted to 350 characters. Including spaces

Covers value creation (debt, equities, options) in a wide range of perspectives (leaders, shareholders, bondholders). Includes factors impacting corporate decisions and the role of strategy in corporate financial decisions. Teaches how to present a case analysis in a concise and meaningful manner. Requires a team project.

This description has been approved by the catalog office: Emory 1/19/2018

Catalog & Curriculum Manager Date

In addition, please attach a course syllabus and/or more detailed description.

Restrictions [ ] Prerequisite: BUS 3210

Course Number

[ ] Corequisite

Course Number

[ ] and [ ] or

Grades to be Issued

[ ] A, B, C, D, F

[ ] A, B, C, D, F, CEU/Audit

[ ] CEU

[ ] S, U

[ ] P, F

[ ] Other

Additional Restrictions [ ] and [ ] or

(e.g., Major, Class Level, Department Head Approval)

If this course replaces a course currently offered in BANNER, please indicate old course information and the date/term the course may be removed from the system.

Subject Alpha Prefix (e.g., CSE) [ ] Course No. (e.g., 1301) [ ] Term to Inactivate

[ ] Yes [ ] No Will this course be used to measure program-level student learning outcomes? If yes, review and signature required.**

[ ] Yes [ ] No Will this course be used to satisfy the scholarly inquiry requirement? If yes, attach "Q" materials for review.

[ ] Yes [ ] No Will this course impact any existing programs? If yes, attach "Changing Graduation Requirements" form for each program impacted.

[ ] Yes [ ] No Will this course be used to satisfy the Cross Cultural (CC) requirement? If yes, attach confirmation memo from QEP2 Committee.

Approvers: On completion of description and course number verification, affix appropriate signatures as indicated, and submit the Office of Graduate Programs, or Undergraduate Curriculum Committee Chair for placement on agenda.

Signatures

Chair, Graduate Council Date

Chair, Undergraduate Curriculum Committee Date

[ ] Yes [ ] No Will this course be used to measure program-level student learning outcomes? If yes, review and signature required.**

[ ] Yes [ ] No Will this course be used to satisfy the scholarly inquiry requirement? If yes, attach "Q" materials for review.

[ ] Yes [ ] No Will this course impact any existing programs? If yes, attach "Changing Graduation Requirements" form for each program impacted.

[ ] Yes [ ] No Will this course be used to satisfy the Cross Cultural (CC) requirement? If yes, attach confirmation memo from QEP2 Committee.

Catalog & Curriculum Manager Date

Registrar’s Use Only

SCACRESC SCADETL SCAIPRED SCABASE ACatalog

SCARES CIP Code 520899 Operator Init. Date

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RGR-350-1217
Nathan M. Bisk College of Business  
BUS 4XXX Financial Case Management  
Babcock Oaks 145  
Section 1: M-W: 2:00 – 3:15  
SPRING 2018

SYLLABUS

Instructor:
Meeting Times:
Class Location:
Office Location:
Phone:
Office hours:
Email:

PRE-REQUISITE:
BUS3XXX: Intermediate Financial Management

READING MATERIALS:
Friedman, Thomas L. 2005. The World is Flat, Farrar, Straus, and Giroux
Articles, as assigned.

OTHER MATERIALS
Financial calculator - HP or Texas Instruments
Computer access to spreadsheet and word processing programs

SUGGESTED OUTSIDE READING
Wall Street Journal, Yahoo Finance, Bloomberg Finance

Knowing what’s going on daily in the world of finance is a great first step to understand the world of business. Get in the habit of reading something financial EVERYDAY and learn to track the financial performance of firms, industries, markets.
Twitter:
I will occasionally post article on my twitter account. You will be required to read these articles and be prepared to discuss them in the class and possibly use them in your case analysis. Please have a working twitter account within the first week of class.

Course Description

Course Objectives

1. Quantitative - To focus the student on understanding value creation in real world situations - especially with regard to a wide range of debt, equities, and options and a wide range of perspectives such as investor, creditor, and managers (CEO, CIO, COO, CFO, Labor, Shareholders, Bondholders).

2. Qualitative – To focus the student on understanding the complete (non-quantitative) factors impacting corporate decisions – especially with regard to ethics, shareholder ownership model, corporate mission and vision).

3. Action Plans - To understand the role of strategy in corporate financial decisions, and how to apply tactical force to shape the future of the firm (future cash flows)

4. Capital Markets - To concentrate on the capital markets in four ways: illustration of the important players, interpretation of capital market conditions, exploration of the design of financial securities, and understanding the importance of the transparency of the firm in an efficient market

5. Presentation – To enhance the students ability to present case analysis in a concise and meaningful manner. To enhance the students ability to participate in, and effectively manage a team project.

6. External Focus:
   1. To introduce students to the management tenets of leading strategic thought leaders, (Peter F. Drucker, Kenichi Ohmae, Michael E. Porter), and other modern leaders in management.
   2. To develop an international perspective to the students’ strategic analysis.
COURSE COMPETENCIES

A. College of Business
   1. Professional Competence
      a. Specialized business knowledge
      b. Analytical
      c. Logical thinking
      d. Conceptual thinking
      e. Application of theory and concepts
   2. Communication
      a. Verbal and written
      b. Presentation
   3. Integrity
      a. Honesty +
   4. Interpersonal Competence
      a. Respect
      b. Preparedness
      c. Presentation

B. FIN 4XXX - Financial Case Management
   1. Diagnostic use of concepts – Use theories and concepts to evaluate and solve financial analysis problems
   2. Interpersonal communication - Effective use of verbal and written communication skills as well as strong command of body-language (self presentation)
   3. Accountability and reliability – Students will not play the victim. Students will develop a professional approach to assignments, homework, and teamwork. Students will be responsible for themselves and their team
   4. Decision Making – Students will learn to make decisions based on the logical facts presented and the available non-quantitative factors. Students will learn to make solid business decisions in spite of a “lack of complete information”.
   5. Conceptualization – Look for the “big picture”. Students will learn to think in terms of an issue or problem to be solved and not focus only on the financial technique.
   6. Enthusiasm – Have fun!
**STUDENT LEARNING OUTCOMES**
This course is designed as a strategic case analysis study and as such, is dependent on prerequisite fundamental financial techniques (TVM, Capital Budgeting, Capital Structure, etc). This course is focused on enhancing the ability to think strategically in a decision context. While fundamental techniques are assumed, the objectives of this course are focused on strategy and decisions. Specific learning outcomes are as follows:

1. Understand and present financial quantitative reasoning based on case analysis.
2. Understand and present corporate (firm-level and project level) qualitative reasoning based on case analysis.
3. To formulate and financially support action plans (decisions) for the future of the firm’s in question.
4. To understand and present the interdependency of public firms and capital markets, and how that impacts corporate decisions (firm-level and project-level).
5. To enhance the students ability to accurately and concisely present case analysis and fully support recommended decisions.
6. To understand and present the stakeholder ownership model for U.S. firms and the shareholder ownership model for non-U.S. firms, and understand how MNE’s use this information to make strategic decisions.

**STUDENT ASSESSMENT CRITERIA**

**Cases**
Students will work in the analysis, interpretation, and presentation of solutions to various assigned cases. Students will work in teams that will be formed during the first week of the semester. For each case, students will prepare a 2 - 3 page Executive Summary and a PowerPoint presentation which will be given class. Each case is worth 50 points. In this course, presentation is extremely important! Be prepared. Be professional. (i.e.: Have all materials ready prior to class.). There is no excuse for not being prepared and there is a 20% penalty for showing up unprepared.

**Paper I**
Students will read *The World is Flat* by Thomas L. Friedman, which will be discussed in class. At the conclusion of the discussion, students will write a 5 - 7 page paper on a subject of interest from the book as it applies to financial management strategy. This assignment is worth 150 points.

**Paper II**
Students will read *Competitive Strategy* by Michael E. Porter, which will be discussed in class. At the conclusion of the discussion, students will write a 5 - 7 page paper on a subject of interest from the book as it applies to financial management strategy. This assignment is worth 150 points.

**Final Paper/Case**
Teams of students will participate in the Final Case. The result of the analysis will be a PowerPoint presentation, complete with exhibits and reference points, in which solutions will be identified and presented.
Participation
This class will be taught as a seminar in financial management strategy. Accordingly, it is expected that students will be prepared to have dialogue about concepts and their application each week.

Teams
During the first week, teams will be formed for the purpose of case analysis and presentation. Each team will consist of 3 – 4 students. Each team member will be assigned the duty of team assessment. Students will allocate points to individual team members based on value and effort provided to the team. The purpose of this is to create an active team with all players equally involved in the analysis, discussion, and presentation.

Grading will be dependant on your ability to address the necessary issues from each case. These issues vary with each case but generally fall into the 4 categories listed below. Additionally, the presentation will be part of the grade. Please note, proper grammar is expected in every write-up and every presentation. Points will be deducted for grammatical errors.

1) Technical Analysis (Quantitative)
2) Qualitative Factors
3) Action Plan
4) Capital Markets and Perspective
5) Presentation

Cases (X @ 50 pts each) 30%
Papers (2 @ 150 each) 15%
Final Case and Presentation 10%
Final paper 25%
Participation 10%
Team Assessment 10%
Total 100%

Scale
A 100 -95   D 69 - 65
A- 94 -90   D- 64 - 60
B 89 -85   F 59 -
B- 84 -80
C 79 -75
C- 74 -70

This course is designed to help the student learn and become proficient in the basics of financial management strategy. It is assumed that this is the objective of each student in the class and that each one wants to learn, otherwise you would not have applied for admission. This is to be a worthwhile experience for everyone involved.
METHODOLOGY
This is a Financial Case Study course. Students will read all assigned materials prior to class. These materials will be the subject of interactive class dialogue in which students will present the major subjects, provide an interpretation of them, and offer insights from previous experience. Throughout each class, there will be questions posed for the students, and it is expected that each one will participate to the degree that s/he wishes.

Throughout each dialogue, there will be conversation about the discussion questions that conclude each case in the text. The main objective is to assist in the learning of interpretive skills as well as computing skills and then to communicate about the specific issues at hand.

Since this course is case driven, all assignments will be associated with case analysis with particular attention given to Quantitative analysis, Qualitative analysis, and creative assessment.

CLASS POLICIES:
1. Attendance and participation are essential for maximum educational advantage and will be expected. Responsibility for all course material rests entirely with each student, whether or not s/he chooses to attend class.

2. Students will be responsible for all materials – even if the student is absent from class. There is a very good chance that those who miss class will be called upon in the next class. It will be advantageous to have the phone numbers and e-mail addresses of the other students. Get them now!

3. It is the prerogative of the instructor to administer unannounced quizzes as part of the student evaluation process and to pass judgment on the merits of all assignments and other requirements.

4. It is assumed that each student will have read the text materials prior to class. Therefore, dialogue will attempt to supplement and expand on the material in the text.

5. As a rule, the format of the class will feature dialogue between all participants, and each student will be expected to be actively involved in all class discussions. That means an emphasis on preparation. Students will also be expected to participate – ask questions, interject personal experience, and add to the overall learning experience. In this course, presentation is extremely important! Be prepared. Be professional. (i.e.: have all materials ready prior to class.). There is no excuse for not being prepared and there is a 20% penalty for showing up unprepared.

6. All assignments are due at the beginning of class. Any turned in more than 15 minutes after class has started will be considered late and will be penalized 20%

7. Cheating of any kind will result in an automatic "F" and dismissal from the class, in accordance with the procedures outlined in the FIT University Student Handbook.

8. More than six (6) unexcused absences will not be tolerated, as class attendance is imperative for success.
9. Any citations should be referenced according to APA standards. Plagiarism is the intentional or unintentional presentation of someone else's words, ideas, or data as one's own work. In the event the faculty member deems the plagiarism is unintentional, he/she shall student to rewrite the assignment. In the event the faculty member believes the plagiarism is willful, the sanctions in *FIT University Student Handbook* will apply, including documentation of the circumstance for inclusion in the student's personal file. If the work of another is used, acknowledgment of the original source must be made through a recognized reference practice, and, if verbatim statements are included, through quotation marks as well. To assure proper crediting, a student will acknowledge the work of others:

B. Whenever one quotes another person's actual words.
C. Whenever one uses another person's idea, opinion, or theory, even if it is paraphrased completely in one's own words.
D. Whenever one borrows facts, statistics, or other illustrative materials -- unless the information is of such common knowledge as not to be questioned.

A grade of "0" will be given on any assignment for which plagiarism has been established.

10. If a student is having problems, please do not hesitate to seek counseling early -- failure to do so usually compounds things later.

**STUDENTS WITH DISABILITIES**

For any students who have specific physical, psychiatric, or learning disabilities and who require special accommodations, please let me know early in the semester so that your learning needs can be met appropriately. It is your responsibility to provide documentation of your disability to Classroom Support Services.

**SCHEDULE AND ASSIGNMENTS**

See Excel Handout for Details

1The schedule and the assignments are subject to revision. We will most likely cover 8 -10 of the above cases and any changes will be announced at least 1 week ahead of time.
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<tr>
<th>WEEK</th>
<th>Financial Case Analysis - Topic List</th>
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<tbody>
<tr>
<td>1</td>
<td>Overview of Financial Analysis (Case Methods)</td>
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<tr>
<td>2</td>
<td>Ethics in Finance</td>
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<td>3</td>
<td>Financial Agenda, Social Considerations</td>
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<td>4</td>
<td>Financial Statement Analysis</td>
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<td>5</td>
<td>Market value of equity</td>
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<td>6</td>
<td>Financial Modeling</td>
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<td>7</td>
<td>Working Capital Management and WACC</td>
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<td>8</td>
<td>WACC Implementation Analysis / Capital Structure</td>
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<td>Topic Paper - Globalization</td>
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<td>Discounted Cash Flow Analysis</td>
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<td>Financial Decision Tools (NPV / IRR / MIRR)</td>
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<td>Topic Paper - Global Competition</td>
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Please provide the following information when requesting a new major or minor (program or option) to be added to the curriculum. Only new majors, minors and options are assigned a new code and print on the diploma. The code will be assigned by the Office of the Registrar and information emailed to all appropriate personnel.

COLLEGE: Bisk College of Business
DELIVERY MODE(S): classroom (classroom, online)
DEPARTMENT: College of Business
CAMPUS/SITE(S): Melbourne - Main Campus

PROGRAM TO BE ADDED: [ ] Major [ ] Minor [ ] Option for (existing degree program)

NOTE: Only Majors, Minors and Options receive new codes and print on the diploma; use Option for new program name to appear with existing degree name.

☐ Associate of Arts (A.A.) ☐ Master of Business Administration (M.B.A.) ☐ Doctor of Aviation (Av.D.)
☐ Associate of Science (A.S.) ☐ Master of Education (M.Ed.) ☐ Doctor of Business Administration (D.B.A.)
☐ Bachelor of Arts (B.A.) ☐ Master of Public Administration (M.P.A.) ☐ Doctor of Philosophy (Ph.D.)
☐ Bachelor of Science (B.S.) ☐ Master of Science (M.S.) ☐ Doctor of Psychology (Psy.D.)
☐ Master of Arts (M.A.) ☐ Master of Science in Aviation (M.S.A.) ☐ Graduate Certificate
☐ Master of Arts in Teaching (M.A.T.) ☐ Educational Specialist (Ed.S.) ☐ Undergraduate Certificate

OTHER ADDITION TO THE CURRICULUM NOTE: Only Majors, Minors and Options receive new codes and print on the diploma; use the Adding a New Concentration or Specialization form if the new program represents less than a full degree curriculum.

PROGRAM TITLE Restricted to 30 characters, including spaces
B.S. Finance

ACADEMIC YEAR TO BE INITIATED: FALL 2018
ADVISOR FOR NEW PROGRAM Dr. Bryant & Dutta

New programs are available beginning with the fall term in which they appear in the University Catalog

ROUTING APPROVALS: 1) Department head/program chair and college dean approve and sign form. 2) The chief academic officer reviews and approves business plan of the program in terms of financial viability and impact on the university mission and signs form. 3) Graduate Council or Undergraduate Curriculum Committee approves academics and signs form. 4) The chief academic officer reviews and signs form, and forwards to the Catalog & Curriculum Manager.

1) [Signature]
   Date 11/8/18

2) [Signature]
   Date 11/9/18

3) Chair, Graduate Council
   Date

4) Chair, Undergraduate Curriculum Committee
   Date

Chief Academic Officer
Date

REGISTRAR'S USE ONLY

FSA ATLAS
SOAXREF
SMAPRLF

STVMAJR
SOACURR
Major Code Assigned

GWVSOAX
CIPC Code
Operator Initials/Date

Florida Institute of Technology • Office of the Registrar
150 West University Boulevard, Melbourne, FL 32901-6975 • 321-674-8365 • Fax 321-674-7827
RGR-337-317
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#### SPRING

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**Total Credit:** 15

#### Senior Year

**FALL**

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**Total Credit:** 15

#### SPRING

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**Total Credit:** 121