*Note before completing this proposal that all core courses for a new program or certificate must have already been reviewed (or submitted for the same meeting) by the Curriculum Committee and approved by the Provost and Vice President of Academic Affairs. In addition, the complete catalog page must be included at the end of this document.*

|  |  |
| --- | --- |
| **School or Division** | School of Business and Technology |
| **Proposed by (faculty only)** | Prof. David Hoffman |
| **Presenter (faculty only)** | Prof. David Hoffman |
| Note that the presenter (faculty) listed above must be present at the Curriculum Committee meeting or the proposal will be returned to the School or Division and must be submitted for a later date. | |
| **Submission date** | 11/23/2015 |

**Section I, New Program or Certificate Information (must complete all items)**

|  |  |
| --- | --- |
| **List new program or certificate** | Financial Services Management |
| **Describe (below) the process by which the need for the new program or certificate was identified** | |
| This is the 27 credit hour Banking Management certificate in the state inventory (CIP 0252080301) under the Finance career cluster.  Suncoast Credit Union, in particular, is asking for a recognized CCC to replace its phased out PCUE program (a training program that it ran in-house) so that employees can be trained to successfully advance within the organization. Suncoast also wants to be able to offer the program to employees throughout the state, not just those within our region. In consultation with this industry partner, this curriculum is appropriate to best meet the identified need. This curriculum also meets the needs for other bank and non-bank financial institutions.  Per the Florida Department of Economic Opportunity, there are 4 classifications of occupations where this training could be appropriately applied, all of which show significant job availability and are on both the statewide Demand Occupations List for 2015-16 as follows:   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | |  | Occupational Title | Ann % Growth | Ann Open | Mean wage | Entry wage | EFI Target | | HSHW | Business Operations Specialists, All Other | 1.52 | 2,516 | 31.01 | 17.72 | Yes | | HSHW | Credit Analysts | 2.63 | 172 | 31.73 | 20.78 | Yes | | HSHW | First-Line Super, Office & Admin. Supt Workers | 1.44 | 3,356 | 24.64 | 16.23 | Yes | |  | Loan Counselors | 2.36 | 174 | 20.94 | 15.14 | Yes |   And on the regional list as follows:   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | |  | Occupational Title | Ann % Growth | Ann Open | Mean wage | Entry wage | EFI Target | | HSHW | Business Operations Specialists, All Other | 2.28 | 111 | 28.08 | 16.32 | Yes | | HSHW | Credit Analysts | 2.63 | 172 | 31.73 | 20.78 | Yes | | HSHW | First-Line Super, Office & Admin. Supt Workers | 2.05 | 176 | 23.63 | 15.69 | Yes | |  | Loan Counselors | 2.36 | 174 | 20.94 | 15.14 | Yes |   Three of the four occupations are also High-Skill, High Wage.  This program also allows SoBT to begin to expand into the financial services area, an area that has been proposed by industry and the advisory committees on occasion in the past. | |
| **Project (below) average enrollment for core courses** | |
| 15-25 students per term for the first year. | |
| **Describe (below) how this projection was determined** | |
| Based on current number of Suncoast employees currently enrolled in business classes. In addition, this number is generally consistent with those business classes that are not typically taken as electives (those with prerequisites) or that come later in the AS degree curriculum. | |
| **List (below) similar programs or certificates at other colleges and universities** | |
| Miami Dade College: Banking Management CCC and AS in Financial Services with two different concentrations  Palm Beach State College: Banking Specialist CCC | |

**Section II, Personnel and Resources Needed** (add rows if necessary)

|  |  |  |
| --- | --- | --- |
| **Faculty position(s) (List discipline)** | **Full time or adjunct?** | **Total annual expenses** |
| Prof. Larry Kirschner | Adjunct | $4500.00 |
| Prof. Matt Visaggio | Adjunct | $4500.00 |
| Prof. Alisa Callahan | F/T | $4842.00 |
| Dr. Tim Lucas | F/T | $5346.00 |
| Other classes already offered | Both | N/A |
| **Staff position(s) (List title)** | **Full time or part time?** | **Total annual expenses** |
| No additional impact |  |  |
|  |  |  |
| **Describe (below) library resources needed to support this program or certificate. Explain rationale for response, even if answer is none** | | |
| No additional resources required. The Library maintains adequate electronic and print business resources for CCC, AS, and BAS programming. | | |
| **Describe (below) the technology, facilities, laboratory, or other resources needed to support this program or certificate** | | |
| No additional | | |
| **List (below) the estimated annual amount required for educational materials and supplies or other operating expenses for implementation of the new program or certificate** | | |
| No additional | | |
| **Identify (below) the funding source to be used for personnel and operating expenses** | | |
| Adjunct budget, Fund 10. | | |

**Section III,Justification for proposal**

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| --- |
| **Provide justification (below) for this proposed curriculum action** |
| There is a bona-fide industry demand for this new workforce credential. The majority of the courses are already in the catalog and are taught in other curricula. |

**Section IV, Important Dates and Endorsements Required**

|  |
| --- |
| **List all faculty endorsements below. (Note that proposals will be returned to the School or Division if faculty endorsements are not provided).** |
| Prof. David Hoffman  Prof. Alisa Callahan  Prof. Leroy Bugger  Prof. Bill Van Glabek  Dr. Tim Lucas |

**nOTE:**Changes for the Fall 2016term must be submitted to the Dropbox by the February 5, 2016 deadline and approved no later than the March 4, 2016 Curriculum Committee meeting. Changes during mid-school year are NOT permitted. Extreme circumstances will require approval from the appropriate Dean or Associate Vice President as well as the Provost and Vice President of Academic Affairs to begin in either theSpring2016 or Summer2016 term.

|  |  |
| --- | --- |
| **Term in which approved action will take place** | Fall 2016 |

|  |  |  |
| --- | --- | --- |
| **Required Endorsements** | **Type in Name** | **Select Date** |
| **Department Chair or Program Coordinator/Director** | Prof. David Hoffman | 11/23/2015 |
| **Academic Dean or Associate Vice President** | Dr. John Meyer | 11/23/2015 |

|  |  |
| --- | --- |
| **Select Curriculum Committee Meeting Date** | February 5, 2016 |

Completed curriculum proposals must be uploaded to Dropbox by the deadline. Please refer to the *Curriculum Committee Calendar* document available in the document manager in the FSW Portal:

* Document Manager
* VP Academic Affairs
* Curriculum Process Documents

**Important Note to Faculty, Department Chairs or Program Coordinators, and Deans or an Associate Vice President:**

Incomplete proposals or proposals requiring corrections will be returned to the School or Division. If a proposal is incomplete or requires multiple corrections, the proposal will need to be completed or corrected and **resubmitted to the Dropbox for the next Curriculum Committee meeting**. All Curriculum proposals require approval of the Provost and Vice President of Academic Affairs. Final approval or denial of a proposal is reflected on the completed and signed Summary Report.

***Include complete new catalog page below.***

**Financial Services Management, CCC**

**Purpose**

This program is part of the Finance career cluster.

A College Credit Certificate consists of a program of instruction of less than sixty (60) credits of college-level courses, which is part of an A.S. degree program and prepares students for entry into employment.

The College Credit Certificate (CCC) in Financial Services Management offers a sequence of courses that provides coherent and rigorous content aligned with challenging academic standards and relevant technical knowledge and skills needed to prepare for further education and careers in the retail financial services sector including banks, credit unions, and other non-bank retail financial services operations.

The purpose of this program is to prepare students for initial employment with an occupational title or to provide supplemental training for persons previously or currently employed in these occupations with cross-functional skills necessary for planning, and operations of retail financial services operations.

**Program Structure**

This program is a planned sequence of instruction consisting of 27 credit hours of business and finance curriculum.

**Course Prerequisites**

***Many courses require prerequisites.*** Check the description of each course in the list below to check for prerequisites, minimum grade requirements, and other restrictions related to the course. Students must complete all prerequisites for a course prior to registering for it.

**Certificate Completion/Graduation**

Students must fulfill all requirements of their program major after which, students must completean application for graduation through the Office of the Registrar and enroll in the GRD 1500course the semester in which they intend to graduate. Students must apply for graduation ***by thepublished deadline***to be assured of final clearance for graduation, timely receipt of theirdiploma, and participation in the commencement ceremony.

**Financial Services Management Certificate Requirements: 27 credit hours**

ACG 2021 – Financial Accounting – 3 credits

BAN 1004 – Principles of Banking/Credit Union Operations – 3 credits

BUL 2241 – Business Law – 3 credits

CGS 1100 – Computer Applications for Business - 3 credits

GEB 2430 – Ethics in Management – 3 credits

MAN 1023 – Management for Non-Profit Organizations – 3 credits

MAN 2021 – Management Principles – 3 Credits

MAR 2011 – Marketing – 3 Credits

MKA 1161 – Introduction to Customer Service – 3 Credits

**Total Certificate Requirements: 27 Credit Hours**

**Information is available online at:** [**www.fsw.edu/academics**](http://www.fsw.edu/academics) **or on the School of Business and Technology Home Page at:** [**www.fsw.edu/sobt**](http://www.fsw.edu/sobt)**.**