Originating Course Information

Offering of Consumer Sciences 5194: Group Studies in Consumer Sciences
Fiscal Unit/Academic Org
Dept Of Consumer Sciences - D1255
Requirement/Elective Designation
Not A General Education course

General Information

Type of Request
Group Studies
Term of Offering
Autumn 2012 - Session 1
Level/Career
Graduate, Undergraduate
Rationale for proposing this offering
Help bridge the gap for students who have not taken CFFS 360. Only offered once autumn 2012 due to semester conversion.
Description for this offering
Analytical techniques for family financial management concepts (offered one time in conjunction with CSCFMFNS 5260 during Au 2012 for students who did not previously take CSCFMFNS 360).

Attachments

* syllabus_5194familyfinancialanalyses.doc: Syllabus
  (Syllabus. Owner: Zircher, Andrew Paul)
* 5194 OneTimeSupplement.doc: Supplemental form
  (One Time Form Supplement. Owner: Zircher, Andrew Paul)

Comments

Workflow Information

<table>
<thead>
<tr>
<th>Status</th>
<th>User(s)</th>
<th>Date/Time</th>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Zircher, Andrew Paul</td>
<td>04/25/2012 08:46 PM</td>
<td>Submitted for Approval</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Ronis, Jason Chadwick  Fox, Jonathan Jay  Zircher, Andrew Paul</td>
<td>04/25/2012 08:46 PM</td>
<td>Unit Approval</td>
</tr>
</tbody>
</table>
A. **One-time Request Information** (This section is required for all one-time offering requests)

1. Requested Room Capacity (if university pool classroom is being requested) _30_______________
2. Enrollment Capacity  _30_______________
3. Waitlist Capacity  _99_______________
4. Final Exam: 
   - X Yes  
   - No
   Last Class (Note: per faculty rules, this option is *NOT* available for the Undergraduate career)
   a. Exam Seat Spacing __________________
5. Special Instructions or Additional Information

__________________________________________

__________________________________________

6. Class Search Title (18 character limit) Fam Fin Analysis ________________________________
7. Display in Class Search :
   - X Yes  
   - No
8. Credit Hours 1__________________________
9. Course Components (check all that apply):
   - [ ] Clinical  [ ] Field Experience  [ ] Independent Study
   - [ ] Laboratory  [ x ] Lecture  [x ] Recitation
10. Graded Component (check one):
    - [ ] Clinical  [ ] Field Experience  [ ] Independent Study
    - [ ] Laboratory  [ x ] Lecture  [ ] Recitation
11. Campus of Offering (check all that apply):
    - [ x] Columbus  [ ] Marion  [ ] Newark
    - [ ] Lima  [ ] Mansfield  [ ] Wooster (ATI)
12. Prerequisites and Exclusions: corequisite CSCFFS 5260

13. Permission to Enroll in this course: □ No Consent needed □ Department Consent □ Instructor Consent

14. General Education Details (if applicable): Attach GE model curriculum compliance statement and GE course assessment plan.

Not applicable

B. Group Studies Request Information (This section is required for group studies requests only)

1. Previous quarters of offering and enrollment (Regular course numbers should be sought for group studies courses taught three times with success).
   None

2. This course has been discussed with and has the concurrence of the following academic units needing this course or with academic units having directly related interests (list units here and attach letters indicating concurrence or objection from academic units that might have jurisdictional interests).
   None- covering content from old CSCFFS 360 for students in transition who did not take it previously.

3. Attach the course syllabus that includes the topical outline of the course, student learning outcomes and/or course objectives and methods of evaluation.

Attached

C. Flexibly Scheduled/Off Campus/Workshop Request Information (This section is required for flexibly scheduled / off-campus / workshop requests only)

1. Start Date and End Date ________________________________

2. Previous quarter(s) of offering and enrollment ________________________________

3. Expected enrollment for proposed quarter of offering ________________________________

4. Attach the course syllabus that includes the topic outline of the course, student learning outcomes and/or course objectives, methods of evaluation and off-campus field experience.

5. Off-Campus Site ________________________________

6. Will course be taught in distance learning format: □ Yes □ No
7. Complete the following for courses offered for less than term length or for Workshops:

<table>
<thead>
<tr>
<th></th>
<th>Present Offering</th>
<th>Proposed Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level and Credit Hours:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class/Lab Contact Time:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prerequisites:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exclusion or Limiting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade Options (Check)</td>
<td>□ Letter □ S/U □ Progress</td>
<td>□ Letter □ S/U □ Progress</td>
</tr>
<tr>
<td>Number of Hours of out-of-class preparation required:</td>
<td>□ □</td>
<td>□ Total hours of class meetings:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. Complete this section for Off-Campus courses only:

Distribution of contact time (explain differences from on-campus offerings):
________________________________________________________________________

Instructor ___________________________ Rank ___________________________

Qualifications (explain any difference in rank/qualification from on-campus instructors)
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Explain differences in teaching arrangements from on-campus offerings
________________________________________________________________________
________________________________________________________________________

Student Services (explain how they will be provided to off-campus students):
Registration ___________________________

Office Hours ___________________________

Academic Advising _______________________

D. Study Tour Request Information (This section is required for study tour requests only)

1. Previous quarters of offering and enrollment:
________________________________________________________________________

2. Expected enrollment for proposed quarter of offering:
________________________________________________________________________
3. This request has been discussed with and has the concurrence of the following academic units needing this study tour or with academic units having directly related interests (list units and this course has been discussed with and has the concurrence of the following academic units needing this course or with academic units having directly related interests (list units here and attach letters indicating concurrence or objection from academic units that might have jurisdictional interests):

4. Attach the academic plan that includes student learning outcomes and/or course objectives, topical outline and percent of time spent on each topic, methods of instruction, course requirements, methods of examination and percent of the final grade each method constitutes, textbooks and/or reading lists, admission procedure, orientation and debriefing plans and method of dealing with any expected language barriers.

5. Attach the administrative plan for the study tour that includes an itinerary, arrangements for travel, housing, meals, classrooms, excursions, and budget.

ATTACHMENT TYPES that may be needed for this form:

- Cover Letter
- Syllabus
- Study Tour Academic Plan
- Study Tour Administrative Plan
- Concurrence Letters / Forms
- GE model curriculum compliance statement
- GE course assessment plan
- Memo of Understanding
- Appeal statement
- Other supporting documentation
Begin Component 1

1. Component (Section) Type (Choose 1):
   - [ ] Clinical
   - [ ] Field Experience
   - [ ] Independent Study
   - [ ] Lab
   - [ ] Lecture
   - [ ] Recitation
   - [ ] Seminar
   - [ ] Workshop

2. Instruction Mode. (Choose only ONE):
   - [ ] Clinic Field Experience
   - [ ] Computer taught
   - [ ] Distance Learning
   - [ ] Flexibly Scheduled
   - [ ] In Person
   - [ ] Video Taught

3. Meeting Pattern
   - [ ] MON [ ] TUE [ ] WED [ ] THR [ ] FRI [ ] SAT [ ] SUN

4. Meeting start time: ___________  5. Meeting end time: ___________

6. Instructors. Provide at least 1 primary instructor.

<table>
<thead>
<tr>
<th>Instructor Name.n</th>
<th>Role</th>
<th>Access</th>
<th>Print name in schedule?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Central classroom pool facility or department room: [ ] Pool [ ] Dept

8. Room Characteristics. Specify up to 5 in priority order.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Characteristic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

9. Notes: ______________________________________________________________
    ___________________________________________________________________
    ___________________________________________________________________
    ___________________________________________________________________

9a. Notes print location relative to class listing: [ ] Do not Print [ ] Before [ ] After
1. Component (Section) Type (Choose 1):
   - [ ] Clinical
   - [ ] Field Experience
   - [ ] Independent Study
   - [ ] Lab
   - [ ] Lecture
   - [ ] Recitation
   - [ ] Seminar
   - [ ] Workshop

2. Instruction Mode. (Choose only ONE):
   - [ ] Clinic Field Experience
   - [ ] Computer taught
   - [ ] Distance Learning
   - [ ] Flexibly Scheduled
   - [ ] In Person
   - [ ] Video Taught

3. Meeting Pattern
   - [ ] MON [ ] TUE [ ] WED [ ] THR [ ] FRI [ ] SAT [ ] SUN

4. Meeting start time: ___________  5. Meeting end time: ___________

6. Instructors. Provide at least 1 primary instructor.

<table>
<thead>
<tr>
<th>Instructor Name</th>
<th>Role</th>
<th>Access</th>
<th>Print name in schedule?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

7. Central classroom pool facility or department room: [ ] Pool [ ] Dept

8. Room Characteristics. Specify up to 5 in priority order.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Characteristic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

9. Notes: ______________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

9a. Notes print location relative to class listing: [ ] Do not Print [ ] Before [ ] After
1. Component (Section) Type (Choose 1):
   - [ ] Clinical
   - [ ] Field Experience
   - [ ] Independent Study
   - [ ] Lab
   - [ ] Lecture
   - [ ] Recitation
   - [ ] Seminar
   - [ ] Workshop

2. Instruction Mode. (Choose only ONE):
   - [ ] Clinic Field Experience
   - [ ] Computer taught
   - [ ] Distance Learning
   - [ ] Flexibly Scheduled
   - [ ] In Person
   - [ ] Video Taught

3. Meeting Pattern
   - [ ] MON [ ] TUE [ ] WED [ ] THR [ ] FRI [ ] SAT [ ] SUN

4. Meeting start time: ___________  5. Meeting end time: ____________

6. Instructors. Provide at least 1 primary instructor.

<table>
<thead>
<tr>
<th>Instructor Name.</th>
<th>Role</th>
<th>Access</th>
<th>Print name in schedule?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Central classroom pool facility or department room: [ ] Pool [ ] Dept

8. Room Characteristics. Specify up to 5 in priority order.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Characteristic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

9. Notes: __________________________________________________________
    __________________________________________________________________
    __________________________________________________________________
    __________________________________________________________________

9a. Notes print location relative to class listing: [ ] Do not Print [ ] Before [ ] After
CSCFMFNS 5194, Group Studies, Family Financial Analyses, Consumer Sciences
Department, Ohio State University
Instructor: Dr. Sherman D. Hanna, Professor.

Course Description: Analytical Techniques for family financial management concepts (offered one time in conjunction with CSCFMFNS 5260 during Autumn, 2012 for students who did not previously take CSCFMFNS 360). Level: U G Semester hours: 1.
Prerequisites: CSCFMFNS 3260 or Fm Res M 359 (Family Financial Management: Theory and Practice); CSCFMFNS 4260 or Fm Res M 560; (Family Financial Management III, or equivalent course in family income tax planning); Bus-Fin 420 or 620 (or equivalent course in business finance); also, as prereq or concurrently, CSCFMFNS 4280 or Fm Res M 568 (Intergenerational Resource Management, or equivalent course in estate planning).
Students in the financial planning track should take 5260 as the final course, and therefore should have also already or be concurrently taking CSCFMFNS 4270 or CSCFMS 561 (Retirement Planning and Employee Benefits or equivalent course or courses in retirement planning and employee benefits planning);

Classes: Two 55 minute meetings per week for 7 weeks

Overall Course Objectives:
Each student will apply concepts covered in previous financial planning courses to hypothetical cases.

After completion of this course, the student will be able to:
Learning Objectives

Upon completion of this course, the student will be able to:
1. Demonstrate a comprehensive understanding of the content found within the Financial Planning curriculum and effectively apply and integrate this information in the formulation of a financial plan.
2. Effectively communicate the financial plan, both orally and in writing, including information based on research, peer, colleague or simulated client interaction and/or results emanating from synthesis of material.
3. Analyze personal financial situations, evaluating clients’ objectives, needs, and values to develop an appropriate strategy within the financial plan.
5. Demonstrate logic and reasoning to identify the strengths and weaknesses of various approaches to a specific problem.
6. Evaluate the impact of economic, political, and regulatory issues with regard to the financial plan.

Brief Outline of Major Topics:
1. Family Financial Goals
2. Using Prescriptive Life Cycle Model to Analyze Family Financial Plans
3. Analyzing Family Budgets
4. Insurance Planning
5. Investment Planning
Primary Texts and Other Required Reading:
Required:

Instructor course packet.
Each student must have a financial calculator and be able to use it: TI BA II + or HP 12-C.

<table>
<thead>
<tr>
<th>Weekly Course Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Week</strong></td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Week</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>6</td>
</tr>
<tr>
<td>7</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>