

Program Inactivation Proposal
CG 16: Financial Planning Graduate Certificate – CIM Key #452

Materials linked from the March 9, 2023 Faculty Senate agenda.

In Workflow

1. **APA Coordinator Programs**
2. **Catalog Coordinator**
3. **02 Dean Designee**
4. **Provost Designee**
5. **Ecampus Programs**
6. **14 Day Review**
7. **John Becker-Blease (College of Business, Associate Dean of Graduate Programs, and Graduate Council Chair)**
8. **AFIS Head**
9. **02 College Committee Approver**
10. **APA Coordinator Programs**
11. **John Becker-Blease (College of Business, Associate Dean of Graduate Programs, and Graduate Council Chair)**
12. **Budgets and Fiscal Planning Committee Chair**
13. **Graduate Council Co-Chairs**
14. **APA Coordinator Programs**
15. **Curriculum Council Co-Chairs**
16. **Executive Committee**
17. **Faculty Senate**
18. APA Coordinator Programs
19. NWCCU
20. Catalog Coordinator
21. Graduate Curriculum Tables
22. Catalog Coordinator

Approval Path

1. Mon, 28 Feb 2022 21:27:19 GMT
Janice Nave-Abele (Curriculum Management, Curriculum Coordinator) (janice.nave-abele): Approved for APA Coordinator Programs
2. Wed, 02 Mar 2022 08:02:12 GMT
Belinda Sykes (Office of the Registrar, Catalog & Curriculum Coordinator) (belinda.sykes): Approved for Catalog Coordinator
3. Fri, 15 Apr 2022 21:36:39 GMT
Prem Mathew (College of Business, Associate Dean of Undergraduate Programs) (prem.mathew): Approved for 02 Dean Designee
4. Mon, 18 Apr 2022 14:52:19 GMT
Alix Gitelman (Vice Provost for Academic Affairs) (alix.gitelman): Approved for Provost Designee

5. Tue, 03 May 2022 15:53:37 GMT
Shannon Riggs (Ecampus, Executive Director Course Dev Learn Innov) (shannon.riggs):
Approved for Ecampus Programs
6. Wed, 18 May 2022 09:33:57 GMT
0/1 votes cast.
Yes: 0% No: 0%
Approved for 14 Day Review
7. Mon, 08 Aug 2022 19:59:55 GMT
John Becker-Blease (College of Business, Associate Dean of Graduate Programs, and
Graduate Council Chair) (john.becker-blease): Approved for beckerbj
8. Mon, 08 Aug 2022 20:06:25 GMT
David Berger (School of Accounting, Finance & Information Systems, Associate
Professor) (dave.berger): Approved for AFIS Head
9. Mon, 19 Sep 2022 22:44:09 GMT
Prem Mathew (College of Business, Associate Dean of Undergraduate Programs)
(prem.mathew): Approved for 02 College Committee Approver
10. Tue, 20 Sep 2022 18:27:35 GMT
Janice Nave-Abele (Curriculum Management, Curriculum Coordinator) (janice.nave-
abele): Approved for APA Coordinator Programs
11. Wed, 21 Sep 2022 20:57:52 GMT
John Becker-Blease (College of Business, Associate Dean of Graduate Programs, and
Graduate Council Chair) (john.becker-blease): Approved for beckerbj
12. Mon, 10 Oct 2022 14:25:16 GMT
Frank Chaplen (Biological & Ecological Engineering, Associate Professor, and Budgets &
Fiscal Planning Committee Chair) (frank.chaplen): Approved for Budgets and Fiscal
Planning Committee Chair
13. Tue, 25 Oct 2022 19:35:27 GMT
John Becker-Blease (College of Business, Associate Dean of Graduate Programs, and
Graduate Council Chair) (john.becker-blease): Approved for Graduate Council Co-Chairs
14. Tue, 25 Oct 2022 21:38:53 GMT
Janice Nave-Abele (Curriculum Management, Curriculum Coordinator) (janice.nave-
abele): Approved for APA Coordinator Programs
15. Thu, 10 Nov 2022 16:08:25 GMT
Ping-Hung Hsieh (College of Business, Professor) (ping-hung.hsieh): Approved for
Curriculum Council Co-Chairs
16. Wed, 15 Feb 2023 03:59:55 GMT
Vickie Nunnemaker (Faculty Senate, Special Assistant to the Faculty Senate President)
(vickie.nunnemaker): Approved for Executive Committee

History

1. Sep 3, 2020 by Belinda Sykes (Office of the Registrar, Catalog & Curriculum Coordinator)
(belinda.sykes)

Program Inactivation Proposal

Date Submitted: Fri, 25 Feb 2022 19:02:27 GMT

Viewing: **CG16 : Financial Planning Graduate Certificate**

Last approved: Thu, 03 Sep 2020 06:37:33 GMT

Last edit: Thu, 30 Jun 2022 02:01:32 GMT

Changes proposed by: beckerbj

Effective Term

Summer 2023

Justification

We have never had a student enroll in this certificate and have suspended any recruiting efforts. The original certificate was poorly timed with a change in alternative methods of earning the necessary coursework for the credential.

When did this program last have student enrollment? **laststudentenrollment (Last Student Enrollment)**

Never

What is the teach-out plan for students currently enrolled in the program? If any core courses will stop being taught, what substitutions will be offered in their place so that students can still complete their requirements?

Teach Out Plan: **teach_out_plan (Teach Out Plan:)**

No students have ever enrolled in the certificate so no teach-out plan is required.

Explain how the academic unit's current objectives, functions, and/or activities will change. Address issues such as course offerings, student learning outcomes and experiences, and how the advising structure and availability will be changed. Describe the extent to which affected faculty and staff support this change.

Objectives, Functions, and Activities: **obj_func_act (Provide Objectives, Functions, and Activities:)**

There will be no changes.

How will the change support OSU's mission, vision, and goals?

Mission: **mission (Mission:)**

There will be no changes; this program has not factored into our plans for many years.

Describe the potential positive and negative impacts of the change. Identify other OSU programs or units which might be affected and describe the impact on their mission and activities.

Impact: `missionposneg (Impact:)`

No negative impact. Terminating degree will allow for a more accurate graduate catalog.

Describe how the proposal will affect the long-range strategic goals and plans for the academic program(s) or academic unit(s). Compare with OSU's current strategic plan and its three signature areas of distinction.

Strategic Plan: `strat_plan (Strategic Plan:)`

No impact.

What is the relationship with constituencies outside of OSU (e.g., federal state, local, private) and other institutions in Oregon? Describe how this relationship might be altered.

External Impacts: `external_impacts (External Impacts:)`

No relationships are linked to this program.

If the academic program is professionally accredited, identify the accrediting body and describe how the proposed change may affect accreditation.

Accreditation: `delete_accreditation (Accreditation:)`

No effect.

External Letters of Support

Financial Planning GC Termination Letter of Support.docx

Organizational Chart

Budget Worksheet and Narrative

Budget Narrative_GCFP_Termination.docx

Proposal

Effective Term

Summer 2023

Justification

Primary Originator

Name

John Becker-Blease (College of Business, Associate Dean of Graduate Programs, and Graduate Council Chair)

Program Information

Program Level

Graduate

Program Type

Certificate

Name

Financial Planning Graduate Certificate

Program (SIS) Code

CG16

CIP Code

520804 - Financial Planning and Services.

College

Business (02)

Academic Unit

School of Accounting, Finance & Information Systems

Is this program jointly administered?

No

Date the Early Alert was submitted for this proposal

What degree types are available for this graduate or professional program?

Certificate

Campus Locations

Corvallis

Ecampus

Is this program currently or planned to be offered in hybrid format?

No

Will this program lead to professional licensure in any U.S. state or territory?

No

Executive Summary

Executive Summary

Graduate Learning Outcomes (GLOs) for Graduate Students

Will this program fulfill more than one learning outcome?

Conduct research or produce some other form of creative work

List the measures or instruments used to assess each outcome. How do students demonstrate their attainment of the learning outcome? How is their learning evaluated? At least one of these must be a direct measure. In order to explore trends in the data, we advise that assessment method remain consistent from year-to-year

Has this assessment method changed since the last reporting cycle?

What benchmark or milestone - related to the specific measure or instrument - is used to determine whether the outcome has been satisfactorily met by the students? In order to explore trends in the data, we advise that benchmarks remain consistent from year-to-year

Describe any changes to the benchmark or milestone since the last reporting cycle

Describe the data collection process (e.g., Who is involved? How is the data collected?)

What do the data show about student learning relative to the specific learning outcome? Describe any result, pattern, or trends that you identify as meaningful or that highlights an area(s) of concern or success

Describe any course-level (content, pedagogical, structural, etc.) changes that are an outgrowth of the current year's assessment of this outcome. Include timelines

Describe any program or degree-level changes that are an outgrowth of the current year's assessment of this outcome. Include timeline

If this learning outcome has been assessed previously and is being reported on again this year, what impact have the changes had (if any) on student learning? If you have not previously assessed this learning outcome, indicate the year you will revisit this outcome

Demonstrate mastery of subject material

List the measures or instruments used to assess each outcome. How do students demonstrate their attainment of the learning outcome? How is their learning evaluated? At least one of these must be a direct measure. In order to explore trends in the data, we advise that assessment method remain consistent from year-to-year

Has this assessment method changed since the last reporting cycle?

What benchmark or milestone - related to the specific measure or instrument - is used to determine whether the outcome has been satisfactorily met by the students? In order to explore trends in the data, we advise that benchmarks remain consistent from year-to-year

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Describe the data collection process (e.g., Who is involved? How is the data collected?)

What do the data show about student learning relative to the specific learning outcome? Describe any result, pattern, or trends that you identify as meaningful or that highlights an area(s) of concern or success

Describe any course-level (content, pedagogical, structural, etc.) changes that are an outgrowth of the current year's assessment of this outcome. Include timelines

Describe any program or degree-level changes that are an outgrowth of the current year's assessment of this outcome. Include timeline

If this learning outcome has been assessed previously and is being reported on again this year, what impact have the changes had (if any) on student learning? If you have not previously assessed this learning outcome, indicate the year you will revisit this outcome

Conduct scholarly or professional activities in an ethical manner

List the measures or instruments used to assess each outcome. How do students demonstrate their attainment of the learning outcome? How is their learning evaluated? At least one of these must be a direct measure. In order to explore trends in the data, we advise that assessment method remain consistent from year-to-year

Has this assessment method changed since the last reporting cycle?

What benchmark or milestone - related to the specific measure or instrument - is used to determine whether the outcome has been satisfactorily met by the students? In order to explore trends in the data, we advise that benchmarks remain consistent from year-to-year

Describe any changes to the benchmark or milestone since the last reporting cycle

Describe the data collection process (e.g., Who is involved? How is the data collected?)

What do the data show about student learning relative to the specific learning outcome? Describe any result, pattern, or trends that you identify as meaningful or that highlights an area(s) of concern or success

Describe any course-level (content, pedagogical, structural, etc.) changes that are an outgrowth of the current year's assessment of this outcome. Include timelines

Describe any program or degree-level changes that are an outgrowth of the current year's assessment of this outcome. Include timeline

If this learning outcome has been assessed previously and is being reported on again this year, what impact have the changes had (if any) on student learning? If you have not previously assessed this learning outcome, indicate the year you will revisit this outcome

Process

Describe the process the program used to reflect on the outcome data

Were there any challenges or concerns?

How are the results of your assessment effort related to strategic planning and overall program review?

Are there specific data archiving notes for the outcome(s) you are reporting on in this report?

Plans

Describe the unit's (or sub-units) assessment plans for the upcoming year

Additional Graduate Level Student Learning Outcomes (optional)

Information for the Catalog

How many total credits are required for completion of this program?

Catalog Description (this will display on the Overview tab in the Catalog)

This graduate certificate is designed to help prepare students with an undergraduate degree for careers in financial planning and wealth management. The curriculum includes coursework required by the CFP Board.

Are you adding, removing or changing learning outcomes in this proposal?

Student Learning Outcomes (this will display on the Learning Outcomes tab in the Catalog)

Requirements (this will display on the Requirements tab in the Catalog and be coded into MyDegrees)

Course List		
Code	Title	Credits
Required		
<u>BA 540</u>	CORPORATE FINANCE	3
<u>FIN 542</u>	INVESTMENTS	3
<u>FIN 550</u>	Course FIN 550 Not Found	
or <u>FIN 551</u>	Course FIN 551 Not Found	
<u>FIN 552</u>	Course FIN 552 Not Found	3
<u>FIN 553</u>	Course FIN 553 Not Found	6
<u>MRKT 588</u>	PROFESSIONAL SALES	4
Total Credits		19

Accessibility Form

Accessibility Guidelines

Faculty Guidelines

Information Technology Guidelines

By submitting this form, we affirm that we have reviewed the listed documents and will apply a good faith effort to ensure accessibility in curricular design, delivery, and supporting information.

Budget Information

Budget Worksheet and Narrative

Supporting Documentation

Reviewer Comments

Belinda Sykes (Office of the Registrar, Catalog Curriculum Coordinator) (belinda.sykes) (Wed, 02 Mar 2022 07:59:21 GMT): This proposal terminates the Financial Planning GR Certificate. I can confirm that no student has ever declared it.

Catherine Bolzendahl (School of Public Policy, Director) (catherine.bolzendahl) (Tue, 03 May 2022 16:10:07 GMT): No objections from SPP

Jennifer Alix-Garcia (Sustainability Double Degree, Director) (jennifer.alix-garcia) (Tue, 03 May 2022 16:10:57 GMT): No objections.

Tjodie Richardson (Applied Economics, Head Advisor) (tjrichardson) (Tue, 03 May 2022 16:16:23 GMT): No objections.

Key: 452

Select any proposals you would like to bundle together for approval. Only proposals you have saved are available to bundle.

Bundle Title:

Course:

Proposal A

Program:

Proposal B