January 14, 2015

To: Curriculum Committee

From: Department of Finance, Elaine Wortala

Re: Changes to Real Estate Minor/Concentration

The Department of Finance wishes to modify the requirements for the Real Estate minor/concentration by adding 10 electives to the list and making a requirement that no more than six (6) of these elective requirements can come from one discipline for both the Real Estate minor and the Real Estate concentration.

The electives being added are:


Enclosures:

COURSE FORM
SIGNATURE FORM
PERMISSION
SYLLABI
FACULTY CURRICULUM COMMITTEE

SIGNATURE PAGE

- In section A, list ALL of the forms covered by this signature page. If you submit a form that is not listed in A, your proposal will be held back until we receive a new, updated signature page.
- You must obtain the signature of your department chair and dean before submitting your proposal.

A. FORMS COVERED BY THIS SIGNATURE PAGE. List each form you are submitting—for instance, PSYC 383, Course Form; PSYC, Change of Major Form; PSYC, Change of Minor Form.

Change of Minor Form, REAL
Change/Delete Program Form, REAL

B. APPROVAL AND SIGNATURES.

1. Signature of Department Chair or Program Director:

   [Signature]

   Date: 1/31/2015

2. Signature of Academic Dean:

   [Signature]

   Date: 2/16/15

3. Signature of Provost:

   [Signature]

   Date: 3/10/15

4. Signature of Business Affairs (only for course fees):

   [Signature]

   Date: 

   □ fee approved on 

   □ BOT approval pending

5. Signature of Curriculum Committee Chair:

   [Signature]

   Date: 

6. Signature of Budget Committee Chair (only for new programs):

   [Signature]

   Date: 

7. Signature of Academic Planning Committee Chair (only for new programs):

   [Signature]

   Date: 

8. Signature of Faculty Senate Secretary:

   [Signature]

   Date: 

Date Approved by Faculty Senate: 

   [Signature]
FACULTY CURRICULUM COMMITTEE
CHANGE/DELETE PROGRAM FORM

Instructions:
- Please fill out all of the portions of the form that are specified in section B. You must do this before your request can move forward!
- Remember that your changes will not be implemented until the next catalog year at the earliest.
- If you have questions, please start by checking the detailed instructions on the website.
- Please feel free to contact the committee chair with any remaining questions you might have.

A. CONTACT INFORMATION.

Name: Elaine Worzala Phone: 953-8121 Email: worzalaem@cofc.edu

School: Business
Department or Program: Real Estate Minor

Name and Acronym of Major: Real Estate
BAdm - Business Administration (Major)
REAL - Real Estate (Concentration)

B. CATEGORY OF REVIEW. Please check all that apply, then fill out the specified parts of the form.

☑ Change Request
☐ Add an existing course to requirements or electives (fill out all sections)
☐ Add a new course to requirements or electives (attach completed course form for each; fill out all sections)
☐ Delete courses from requirements or electives (fill out all sections)
☒ Add or modify concentration (fill out C, D, E, G, H, and I)*
☐ Add or modify cognate (fill out C, D, E, G, H, and I)*

*Note: Only concentrations and cognates requiring 18 or more credit hours will be tracked in Banner and Degree Works and noted on the transcript.

☐ Terminate Program (fill out E, G, H, and I)
☐ Terminate degree
☐ Terminate major
☐ Terminate concentration
☐ Terminate cognate

C. GENERAL INFORMATION

Number of Current Credit Hours (for existing program): 18
Number of Proposed Credit Hours (for changed program): 18
Catalog Year in which changes will take effect: FALL 2015

D. CURRICULUM. Please list every change you are making below AND attach the current Program of Study Worksheet for this major (http://registrar.cofc.edu/program-of-study-worksheets/index.php) with changes marked in RED. Additions should show where the course will be inserted, deletions should be noted by crossing out the course, and moves indicated with arrows. Distinguish between required and elective courses, and note any prerequisites, co-requisites, sequencing, or other restrictions. Provide the catalog description and course list exactly as they should appear in the catalog. For each new course, submit the Curriculum Committee’s Course Form and a sample syllabus.

The program of study sheets are attached to the packet.

This form was last updated on 6/6/2013 and replaces all others.
We are adding 10 electives to the list and making a requirement that no more than six (6) credit hours of these elective requirements can come from any one discipline except for REAL.

REAL ESTATE Concentration
Degree: Bachelor of Science
Credit Hours: 18

"PR" indicates a pre-requisite. "CO" indicates a co-requisite.

Required Courses
- REAL 310 Principles of Real Estate
- REAL 410 Real Estate Finance

Elective Courses (12 credit hours)

At least six (6) credit hours from the following:
- REAL 376 Real Estate Market Analysis
- REAL 380 Real Estate Investment Analysis
- REAL 444 Real Estate Internship
- REAL 420 Real Estate Independent Study

And no more than six (6) credit hours from the following:

Any real estate (REAL) course at the 300 level and above
- ECON 307 Urban Economics
- ECON 311 Environmental Economics
- ENTR 320 Principles of Entrepreneurship
- HPCP 319 Architectural Design Studio
- POLI 305 Urbanization and Urban Geography
- UREST 310 Urban Planning

FINC 385 Individual Risk Management and Insurance (3)
Prerequisite: Junior standing.

FINC 313 Management of Financial Institutions (3)
Prerequisites: Junior standing; ACCT 203, 204, FINC 303, ECON 200, 201, MATH 104 or 250.

FINC 389 Financial Management Information Systems (3)
Prerequisites: Junior standing; FINC 303

FINC 360 Special Topics in Finance (3)
Prerequisites: Junior standing; FINC 303; ACCT 203, 204; ECON 200, 201; MATH 104 or 250; or permission of the instructor.

HPCP 315 Urban Design Studio (3)
Prerequisite: UREST 310 or permission of the instructor.

HTMT 351 Hotel Management (3)
Prerequisite: Junior standing; HTMT 210 or permission of the instructor.

This form was last updated on 6/6/2013 and replaces all others.
POLI 306 Urban Policy (3)

TRAN 312 Global Logistics (3)
Prerequisites: ECON 200, 201, junior standing.

URST 320 Town and Country Planning (3)

No more than three (3) credit hours from REAL 420, REAL 444, or REAL 499. No more than six (6) credit hours from HPCP 319, POLS 305 or URST 310. No more than six (6) credit hours from any one area except REAL.

Students completing the Bachelor of Science in Business Administration with a concentration in real estate must complete the B.S.B.A. requirements as specified within the department of Management and Entrepreneurship’s section. The concentration will substitute for the 12 credit hours of upper-level electives required in the B.S.B.A., except for HPCP 319, POLS 305 or URST 310.

NOTE: All prerequisites for business and economics courses must be met. Business Finance (FINC 303) is a prerequisite for most upper-level real estate courses.

E. RATIONALE AND EXPLANATION. Please provide a narrative addressing the request you are making and why you are making it.

The original electives chosen for this concentration were limiting. Real Estate encompasses many fields and disciplines so we wanted to allow the students to choose from a broader array of courses from across the College and also from within the School of Business. We added additional courses in finance, hospitality and transportation from within the school and urban studies, historic preservation and political science from the College. I have worked with the department chairs and program directors for all of the departments to identify the appropriate courses.

F. STUDENT LEARNING OUTCOMES AND ASSESSMENT.

<table>
<thead>
<tr>
<th>Student Learning Outcomes</th>
<th>Assessment Method and Performance Expected</th>
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</tbody>
</table>

This form was last updated on 6/6/2013 and replaces all others.
G. IMPACT ON EXISTING PROGRAMS AND COURSES. Please describe the impact of this request on other programs and courses. If you are deleting a program, please describe the effect on all programs that will be impacted; if you are adding or changing a program, please explain any overlap with existing programs at the College.

Adding these electives to the list will likely increase enrollment in these courses but there are so many too choose from we do not anticipate the increase to be significant for any one course. All department chairs and program directors have indicated it was OK to add their courses to the list of electives.

H. COSTS ASSOCIATED WITH THE REQUESTED ACTION. List all of the new costs or cost savings (including new faculty/staff requests, library, or equipment) associated with your request.

There are no additional costs that are associated with this request.

I. CHECKLIST

☒ I have completed all relevant parts of the form.

☒ I have attached a cover letter that describes my request and lists all the documents I am submitting.

☐ I have attached a Course Form for each newly-created or modified course.

☒ (For proposals that affect other departments in any way) I have attached an acknowledgement from the relevant department.

☒ I have provided the complete curriculum for the program, concentration, emphasis, etc., including the description and course list, exactly as it should appear in the catalog.

☒ I have submitted one Signature Form that lists all of the different forms I am submitting.
So sorry about this. I started this email last week...but forgot to finish it.

For number 1...we want the students to be able to choose 6 credits from the four courses...REAL 376, REAL 380, REAL 420 or REAL 444. I am not sure if we needed to attach the REAL 444 syllabus so I am attaching one now.

The URST 360 should be one of the electives. It was supposed to be URST 360 not REAL 360 as you are entirely correct that REAL 360 is already an elective. So, there are 10 courses...and URST 360 should have been on the elective list. We have included the syllabus in the packet. It is a great course for real estate people.

Please let me know if you need anything else. Thanks for your help and I am sorry for the confusion and the mistakes...

All the best. E.

Elaine Wozzala
Associate Dean of the School of Business
Executive Director of the Carter Real Estate Center
College of Charleston
Charleston, SC
343-953-8121
858-353-2067 (cell)
worzalaem@cofc.edu
http://sb.cofc.edu/centers/carter/

From: Czwazka, Franklin James
Sent: Thursday, March 05, 2015 10:27 AM
To: Wozzala, Elaine M
Cc: Czwazka, Franklin James; Mackeldon, Jerry W; Boyd, Cathy; Bergstrom, Mary C; Springer, Bonnie C; Ford, Lynne E
Subject: Questions for REAL Proposals for March Curriculum Committee Meeting

The RO just reviewed your packet of proposals. Please see below for our questions below:

- Change/Delete Program Form
  - Section D – The current Program of Study Worksheet was not submitted.
    (http://registrar.cofc.edu/program-of-study-resources/program-of-study-worksheets/wkchts14/business-school/badm-
    is-real-2014-check.pdf)

  1.) Changing the current 3 credit hours from REAL 376, 380, and 420 to a 6 credit hours requirement. Is the addition of REAL 444 the intended change?
2.) Changing the current 3 credit hours of Electives to 6 credit hours, and also adding ten additional courses to the list. Amongst the 10 courses in the cover letter is URST 360. However, it is not listed on the mark-up sheet. Is this intended? Should the concentration only include 9 of the 10 courses as noted on the cover letter?

From the concentration as currently listed in the catalog and Program of Study Worksheet:

Choose at least 3 credit hours from the following:

REAL 376 Real Estate Market Analysis (3) CO or PR: Junior standing, FINC 303
REAL 380 Real Estate Investment Analysis (3) PR: Junior standing, ACCT 203, 204, FINC 303, ECON 200, 201, MATH 104 or 250, REAL 310, or instructor permission
REAL 420 Real Estate Independent Study (1-3) PR: Junior standing, instructor and department chair permission

- Minor Form
--Section D – The current catalog entry for this minor was not submitted.
(http://catalogs.cofc.edu/undergraduate/real-estate-minor.htm )

1.) Changing the current 3 credit hours from REAL 376, 380, and 444 to a 6 credit hours requirement. Is the addition of REAL 420 the intended change?

2.) Changing the current 3 credit hours of Electives to 6 credit hours, and also adding ten additional courses to the list. Amongst the 10 courses in the cover letter is URST 360. However, it is not listed on the mark-up sheet. Is this intended? REAL 360 is listed in the mark-up but this course is already included since it is a (REAL) course at the 300 level and above.

From the minor as presented in the catalog:

At least three (3) credit hours from the following:

REAL 376 Real Estate Market Analysis
REAL 380 Real Estate Investment Analysis
REAL 444 Real Estate Internship

Thanks!
Franklin

Franklin J. Czwazka, M.A.
Catalog Manager | Office of the Registrar, College of Charleston
66 George Street | Charleston, SC 29424
843.953.5421 (voice) | 843.953.6560 (fax) | czwazkaf@cofc.edu
Office of the Registrar website: http://registrar.cofc.edu/
Academic Catalogs: http://catalogs.cofc.edu/

Treasurer | Carolina Association of Collegiate Registrars and Admissions Officers (CACRAO)

From: Mackeldon, Jerry W
Sent: Tuesday, March 03, 2015 4:12 PM
To: Boyd, Cathy; Czwazka, Franklin James
Subject: Questions for REAL Proposals for March Curriculum Committee Meeting
FACULTY CURRICULUM COMMITTEE
MINOR FORM

Instructions:
• Please fill out all of the portions of the form that are specified in section B. You must do this before your request can move forward!
• Remember that your changes will not be implemented until the next catalog year at the earliest.
• If you have questions, please start by checking the detailed instructions on the website. Please feel free to contact the committee chair with any remaining questions you might have.

A. CONTACT INFORMATION.

Name: Elaine Worzala Phone: 953-9121 Email: worzalaem@cofc.edu
School: Business Department or Program: Finance
Name and Acronym of Minor: REAL

B. TYPE OF REQUEST. Please check all that apply, then fill out the specified parts of the form.

☐ Add a New Minor (complete all portions)

☐ Change an Existing Minor (complete C, D, E, G, H, and I)
  ☑ Add existing course or courses to requirements or electives
  ☐ Add new course(s) to requirements or electives (attach completed course form for each)
  ☐ Delete courses from requirements or electives

☐ Terminate a Minor (complete E, G, H, and I)

C. GENERAL INFORMATION.

Number of Current Credit Hours (for existing minors): ___18____
Number of Proposed Credit Hours (for new or changing minors): ___18____

Catalog year in which changes will take effect: FALL ___2015____

☐ Interdisciplinary (please see guidelines on the Curriculum Committee website and include acknowledgments from relevant departments)

According to academic policy, students may not obtain a major/concentration and minor in the same subject. Will students in specific majors be prohibited from declaring this minor because of this policy?
___X___ Yes—Which major(s) or concentration(s)? Business Administration - Real Estate Concentration

___ No

D. CURRICULUM. For a changed minor, please list every change you are making below AND attach the current catalog entry for this minor (from the Minor Requirements section) with changes marked in RED. Additions should show where the course will be inserted, deletions should be noted by crossing out the course, and moves indicated with arrows. Distinguish between required and elective courses, and note any prerequisites, corequisites, sequencing, or other restrictions. For each new course, submit the Curriculum Committee’s Course Form and a sample syllabus. For a new program, please submit the complete curriculum and catalog description exactly as they should appear in the

This form was last updated on 6/6/2013 and replaces all others.
POLI 306 Urban Policy (3)

REAL 360 Special Topics in Real Estate (1-3)
Prerequisites: Junior standing; FINC 303.

TRAN 312 Global Logistics (3)
Prerequisites: ECON 200, 201, junior standing.

URST 320 Town and Country Planning (3)

No more than three (3) credit hours from REAL 420, REAL 444, or REAL 499. No more than six (6) credit hours from HPCP 319, POLI 305 or URST 310. No more than six (6) credit hours from any one area except REAL.

Students completing the Bachelor of Science in Business Administration with a concentration in real estate must complete the B.S.B.A. requirements as specified within the department of Management and Entrepreneurship’s section. The concentration will substitute for the 12 credit hours of upper-level electives required in the B.S.B.A., except for HPCP 319, POLI 305 or URST 310.

NOTE: All prerequisites for business and economics courses must be met. Business Finance (FINC 303) is a prerequisite for most upper-level real estate courses.

E. RATIONALE AND EXPLANATION. Please provide a narrative addressing the request you are making and why you are making it. In addition, for a new minor, please address its objectives, provide evidence of student interest (e.g. interviews with student focus groups, enrollment in special-topics courses in this area), and explain how the minor supports the liberal arts tradition as well as the mission of the institution.

The original electives chosen for this minor were limiting. Real Estate encompasses many fields and disciplines so we wanted to allow the students to choose from a broader array of courses from across the College and also from within the School of Business. We added additional courses in finance, entrepreneurship, hospitality, transportation and decision science from within the school and planning, historic preservation and political science from the College. I have worked with the department chairs and program directors for all of the departments to identify the appropriate courses.

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<td>What will students know and be able to do when they complete the minor? Attach a Curriculum Map.</td>
<td>How will each outcome be measured? Who will be assessed, when, and how often? How well should students be able to do on the assessment?</td>
</tr>
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1.

2.

3.

4. This form was last updated on 6/6/2013 and replaces all others.
G. IMPACT ON EXISTING PROGRAMS AND COURSES. Please describe the impact of this request on other programs and courses. If you are deleting a minor, please identify all programs that will be affected. If you are adding or changing a minor, please explain any overlap with existing programs at the College.

Adding these electives to the list will likely increase enrollment in these courses but there are so many too choose from we do not anticipate the increase to be significant for any one course. All department chairs and program directors have indicated it was OK to add their courses to the list of electives.

H. COSTS. List all of the new costs or cost savings (including new faculty/staff requests, library, equipment, etc.) associated with your request.

There are courses that are currently being offered and we do not see any additional costs associated with this request.

I. CHECKLIST.

- [ ] I have completed all relevant parts of the form.

- [ ] I have attached a cover letter that describes my request and lists all the documents I am submitting.

- [ ] I have attached a Course Form for each newly-created or modified course.

- [ ] (For proposals that affect other departments in any way) I have attached an acknowledgement from the relevant department.

- [ ] I have provided the complete curriculum for the minor, including the description and course list, exactly as it should appear in the catalog.

- [ ] I have submitted one Signature Form that lists all of the different forms I am submitting.
So sorry about this. I started this email last week...but forgot to finish it.

For number 1...we want the students to be able to choose 6 credits from the four courses...REAL 376, REAL 380, REAL 420 or REAL 444. I am not sure if we needed to attach the REAL 444 syllabus so I am attaching one now.

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All the best. E.

Elaine Worzala
Associate Dean of the School of Business
Executive Director of the Carter Real Estate Center
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http://sb.cofc.edu/centers/carter/

From: Czwazka, Franklin James
Sent: Thursday, March 05, 2015 10:27 AM
To: Worzala, Elaine M
Cc: Czwazka, Franklin James; Mackeldon, Jerry W; Boyd, Cathy; Bergstrom, Mary C; Springer, Bonnie C; Ford, Lynne E
Subject: Questions for REAL Proposals for March Curriculum Committee Meeting

The RO just reviewed your packet of proposals. Please see below for our questions below:

- Change/Delete Program Form
  --Section D – The current Program of Study Worksheet was not submitted.
  (http://registrar.cofc.edu/program-of-study-resources/program-of-study-worksheets/wkshts14/business-school/badm-05-real-2014-check.pdf)
  1.) Changing the current 3 credit hours from REAL 376, 380, and 420 to a 6 credit hours requirement. Is the addition of REAL 444 the intended change?
2.) Changing the current 3 credit hours of Electives to 6 credit hours, and also adding ten additional courses to the list. Amongst the 10 courses in the cover letter is URST 360. However, it is not listed on the mark-up sheet. Is this intended? Should the concentration only include 9 of the 10 courses as noted on the cover letter?

From the concentration as currently listed in the catalog and Program of Study Worksheet:

Choose at least 3 credit hours from the following:

- **REAL 376** Real Estate Market Analysis (3) CO or PR: Junior standing, FINC 303
- **REAL 380** Real Estate Investment Analysis (3) PR: Junior standing, ACCT 203, 204, FINC 303, ECON 200, 201, MATH 104 or 250, REAL 310, or instructor permission
- **REAL 420** Real Estate Independent Study (1-3) PR: Junior standing, instructor and department chair permission

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**- Minor Form**

--Section D – The current catalog entry for this minor was not submitted. ([http://catalogs.cofc.edu/undergraduate/real-estate-minor.htm](http://catalogs.cofc.edu/undergraduate/real-estate-minor.htm))

1.) Changing the current 3 credit hours from REAL 376, 380, and 444 to a 6 credit hours requirement. Is the addition of REAL 420 the intended change?

2.) Changing the current 3 credit hours of Electives to 6 credit hours, and also adding ten additional courses to the list. Amongst the 10 courses in the cover letter is URST 360. However, it is not listed on the mark-up sheet. Is this intended? REAL 360 is listed in the mark-up but this course is already included since it is a (REAL) course at the 300 level and above.

From the minor as presented in the catalog:

*At least three (3) credit hours from the following:*

- **REAL 376** Real Estate Market Analysis
- **REAL 380** Real Estate Investment Analysis
- **REAL 444** Real Estate Internship

Thanks!

Franklin

Franklin J. Czwasza, M.A.

**Catalog Manager | Office of the Registrar, College of Charleston**

66 George Street | Charleston, SC 29424

843.953.5421 (voice) | 843.953.6560 (fax) | czwaska@cofc.edu


Academic Catalogs: [http://catalogs.cofc.edu/](http://catalogs.cofc.edu/)

**Treasurer | Carolina Association of Collegiate Registrars and Admissions Officers (CACRAO)**

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**From:** Mackeldon, Jerry W

**Sent:** Tuesday, March 03, 2015 4:12 PM

**To:** Boyd, Cathy; Czwaska, Franklin James

**Subject:** Questions for REAL Proposals for March Curriculum Committee Meeting
catalog. Changes to the program are made below in red. We are adding 10 electives to the list and making a requirement that no more than six (6) credit hours of these elective requirements can come from one discipline.

REAL ESTATE Minor Requirements
Degree: Bachelor of Science
Credit Hours: 18

"PR" indicates a pre-requisite. "CO" indicates a co-requisite.

Required Courses
REAL 310 Principles of Real Estate
REAL 410 Real Estate Finance

Elective Courses (12 credit hours)

At least six (6) credit hours from the following:
REAL 376 Real Estate Market Analysis
REAL 380 Real Estate Investment Analysis
REAL 444 Real Estate Internship - CURRENT
REAL 420 Real Estate Independent Study - ADDITION SEE EMAIL

And no more than six (6) credit hours from the following:

Any real estate (REAL) course at the 300 level and above
ECON 307 Urban Economics
ECON 311 Environmental Economics
ENTR 320 Principles of Entrepreneurship
HPCP 319 Architectural Design Studio
POLI 305 Urbanization and Urban Geography
URST 310 Urban Planning

FINC 385 Individual Risk Management and Insurance (3)
Prerequisite: Junior standing.

FINC 313 Management of Financial Institutions (3)
Prerequisites: Junior standing; ACCT 203, 204, FINC 303, ECON 200, 201, MATH 104 or 250.

FINC 389 Financial Management Information Systems (3)
Prerequisites: Junior standing; FINC 303

FINC 360 Special Topics in Finance (3)
Prerequisites: Junior standing; FINC 303; ACCT 203, 204; ECON 200, 201; MATH 104 or 250; or permission of the instructor. Also need consent of the real estate program director.

HPCP 315 Urban Design Studio (3)
Prerequisite: URST 310 or permission of the instructor.

HTMT 351 Hotel Management (3)
Prerequisite: Junior standing; HTMT 210 or permission of the instructor.

This form was last updated on 6/6/2013 and replaces all others.
From: Gilmore, Richard Grant
Sent: Tuesday, January 06, 2015 4:40 PM
To: Worzala, Elaine M
Cc: Mazzone, Marian; Ruthsatz, Ashley Mudge
Subject: Re: HPCP 315

Dear Elaine

I hereby approve HPCP 315 to be an elective for the real estate minor and concentration until further notice.

Regards

Grant Gilmore
R. Grant Gilmore III, PhD, IFA, RPA, ICAHM Expert Member
Director, Historic Preservation and Community Planning Program
Addlestone Chair in Historic Preservation
College of Charleston, Charleston, SC 29464
United States of America

Office: ++1 843 953 6352
Mobile: ++1 843 830 6813
I tweet @Dig_or_Die
Elaine,

The HTMT Department voted to allow HTMT 351 to be offered as a Real Estate upper-level elective.

Bob Frash

Dr. Robert E. Frash, Jr.
Mobile (843) 327-7071

Sent from my iPhone
Please excuse typos
From: Knotts, Gibbs  
Sent: Tuesday, November 25, 2014 8:32 AM  
To: Worzala, Elaine M  
Cc: Keenan, Kevin P  
Subject: RE: adding POLI 306 to the elective list for the real estate minor and concentration

Sounds good to me.

From: Worzala, Elaine M  
Sent: Friday, November 21, 2014 10:47 AM  
To: Knotts, Gibbs  
Cc: Keenan, Kevin P  
Subject: adding POLI 306 to the elective list for the real estate minor and concentration

Good morning, Gibbs,

I have been working with Kevin Keenan on expanding the electives that our real estate minor and concentration students can take. POLI 305 is currently on the list and we were thinking about adding his POLI 306 as well. Would you have a problem with that? Obviously, planning and urban issues are important for anyone studying real estate markets...particularly commercial real estate markets. Kevin and I both think that the topics discussed in both of these classes would be relevant for someone studying real estate issues and planning to work in the real estate industry. Just to be clear...my definition of real estate is broader than many and I believe a good real estate decision (investment, development) must take in to account the urban environment where that real estate is located so understanding urban policy and how decisions are made for a community is important.

So...let me know what you think. All the best, Elaine.

Elaine Worzala  
Director of the Carter Real Estate Center  
College of Charleston  
112 Beatty Center  
Charleston, SC  
843-953-8121  
858-353-2067  
worzalaem@cofc.edu  
http://sb.cofc.edu/centers/carter/
Subject: FW: TRAN 312 as an elective for REAL Concentration and Minor

From: Gourdin, Kent N
Sent: Thursday, January 08, 2015 11:22 AM
To: Davis, Joshua M; Worzala, Elaine M
Cc: Ruthsatz, Ashley Mudge
Subject: RE: TRAN 312 as an elective for REAL Concentration and Minor

Fine by me everyone.

From: Davis, Joshua M
Sent: Thursday, January 08, 2015 11:07 AM
To: Worzala, Elaine M; Gourdin, Kent N
Cc: Ruthsatz, Ashley Mudge
Subject: RE: TRAN 312 as an elective for REAL Concentration and Minor

Thanks for the note Elaine.

Kent—this is your call.

Sincerely,

Joshua M. Davis, Ph.D.
Chair, Department of Supply Chain and Information Management
School of Business
College of Charleston

From: Worzala, Elaine M
Sent: Thursday, January 08, 2015 8:39 AM
To: Davis, Joshua M; Gourdin, Kent N
Cc: Ruthsatz, Ashley Mudge
Subject: RE: TRAN 312 as an elective for REAL Concentration and Minor

Hey guys....did you guys decided if we can list this as an elective for the REAL minors and concentrations? If so, we need a note from you indicating that is ok. Just a quick and dirty one, Josh. PLEASE reply all as Ashley is trying to get this all put together this week and I will be out of town. Thanks. E.

Elaine Worzala
Associate Dean of the School of Business
Executive Director of the Carter Real Estate Center
College of Charleston
Charleston, SC
From: Keenan, Kevin P  
Sent: Friday, November 21, 2014 9:57 AM  
To: Worzala, Elaine M  
Subject: RE: electives for the REAL minor

That sounds like a good one too, and yes I am in charge of the URST classes.

I approve URST 310, 320, and 360 counting towards the REAL minor. You need to attach this to your application.

Kevin
FIN 313-BANK MANAGEMENT
COLLEGE OF CHARLESTON
Course Syllabus
Fall Semester – 2013

Instructor: Jay Peroni, CFP®
Phone: 603-315-9683 (cell)
Email: jay@jayperoni.com
Class Meets: TH 5:30-6:45pm
Class location: Beatty Center 216
Office Hours: Office Hours by appointment

NOTE: It is your responsibility to read, understand and abide by all of the course information and policies listed below. Failure to do so could result in you failing this course or being withdrawn from this course by your instructor or by the Finance Department. The course syllabus provides a general plan for the course; deviations may be necessary.

IMPORTANT RULES, GUIDELINES AND OTHER INFORMATION

NOTE:
I apologize in advance for the official/legal tone of the rules and guidelines that follow. I do not wish to be impersonal, demeaning or harsh. These policies have evolved over many years and hopefully cover any and all questions that may arise concerning the administration of the class.

Course Overview

The financial crisis that appeared in 2007 has dramatically altered global financial institutions and markets. It continues to create macroeconomic problems despite the regulatory reforms that have been implemented. Economic growth is slow and unemployment is high. While the largest institutions have survived and are regaining profitability, many smaller institutions are struggling, in part, because they haven’t had the same access to government guarantees. What does the future hold?

This course is structured around the theme of risk management in banking. You will examine how banking institutions generate earnings and assess the risks assumed in their operations. Topics to be covered include performance analysis, capital management, interest rate risk management, credit analysis and resolving asset quality problems, liquidity planning, investment portfolio analysis, the use of off-balance sheet instruments and activities, and industry consolidation associated with failures and acquisitions. Content and discussion will cover both domestic and international banking activities.

The objective of this course is to provide the student with the conceptual framework necessary to analyze and comprehend the current problems confronting managers of commercial banks and other depository institutions. The course materials do not dwell on the development of financial theories. It is assumed that the student comprehends the basic theoretical concepts of corporation finance, monetary theory, and financial accounting. Each class session will be structured to include lecture, discussion, and problem/case analysis. Text reading assignments are described in the attached materials. Specific dates at which assignments are due will be indicated in class.
Required Course Materials

2. Selected articles and cases

Recommended Materials

1. Bloomberg Business Week
2. Fortune
3. Economist
4. American Banker
5. Financial Times
6. ABA Banking Journal
7. The RMA Journal
8. Forbes

The *Wall Street Journal*, *Business Week*, and *Fortune* can be obtained at reduced student rates by completing the subscription forms circulated in class. The current banking periodicals listed are available in the Moore School library.

**STUDENT RESPONSIBILITY:**
Textbook chapters to read **before the day that topic is covered in class**, are listed in the course outline. Be sure to refer to the outline that corresponds to the class days for the course you attend. The Textbook has been designed as a self-directed learning guide. It is the responsibility of each student to know and understand the subject matter covered in each Textbook chapter whether or not the specific material is covered in class. Additionally, each student is responsible to know how to solve, before each scheduled exam, all of the assignments and problems listed in the course outline for all of the chapters covered in that exam.

**ATTENDANCE:**
Each student is expected to attend **ALL** scheduled class meetings for the **entire duration** of the class meeting. An attendance sign-up sheet will be circulated each class period. **It is your responsibility to sign the attendance sheet. If you do not sign the list, you will be considered absent.** (See the note on academic honesty below). The attendance sheet may be circulated at any time during the class period (at the beginning of class, at the end of class, or in the middle of class) and may even be circulated twice during the same class period. If you do not sign the attendance sheet when circulated or if you do not sign the attendance sheet both times it may be circulated during a given class period, you will be considered absent. Students arriving late may be permitted to sign the sheet only at the discretion of the instructor.

An absence from class for any reason (job conflict, illness, appearance in court, transportation problems, travel, athletic event, etc.), even if permitted and/or excused by your instructor, will count as one of the class absences against the three-week equivalent cumulative limit specified above. **If a student is withdrawn for excessive absences, a final grade of WF will be assigned.** There will be no exceptions to this policy!!!

**ACADEMIC HONESTY:**
The College of Business Administration adheres strictly to the University’s policy on academic honesty as contained in the Academic Regulations section of the College of Charleston Honor Code in the Student Handbook. Any student found copying during exams or quizzes, signing someone else’s name to the attendance list, using stored formulas in programmable calculators, using non-authorized formula sheets or other notes during exams, collaborating on and/or copying the course project (including from students in prior classes), or the like will receive an F for the course and possibly be subject to additional University disciplinary action.

Course Grading

The course grade will be determined on the basis of three written exams and four quizzes given throughout the semester.* There will be five quizzes with the lowest score dropped. The grading weights are provided below. Make-up exams, where appropriate, will be given at the end of the semester. **You must notify me before a quiz or test begins to qualify for consideration regarding a make-up.** Contact me directly via my university telephone number or send me an email message. All exams and quizzes will be problem-oriented and/or short-answer (key concept) in form. If you do not take a quiz, a score of 0 will be assigned.

<table>
<thead>
<tr>
<th>Grading</th>
<th>Total points possible</th>
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<tbody>
<tr>
<td>3 Exams (150 each)</td>
<td>450</td>
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<tr>
<td>2 Projects</td>
<td>225</td>
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<tr>
<td>Attendance &amp; participation</td>
<td>75</td>
</tr>
<tr>
<td>Total Points</td>
<td>750</td>
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</tbody>
</table>

**Class Grading**

A  
90% and above
B+  
87%–89.9%
B   
80%–86.9%
C+  
77%–79.9%
C   
70%–76.9%
D   
60%–69.9%
F   
Below 60%

Assignments & Class Participation

Daily assignments will be made at the end of each class. Typical assignments include background readings and selected problems or a case. Regular participation is an integral part of this class. Each student is expected to contribute by answering questions and presenting data analysis in class. During each session students will be selected to respond to questions. It is expected that each student come to class prepared to participate in class discussion and present his or her analysis. Questions at the end of each chapter will be used as a basis for discussion.
Course Outline: Bank Management

A. Part One: Overview & Asset Liability Management

1. Banking & Financial Services Industry (Chapter 1)
2. Analyzing Bank Performance (Chapter 3)
3. Effective Use of Bank Capital (Chapter 12)
4. Managing Noninterest Income and Noninterest Expense (Chapter 4)
5. The Performance of Nontraditional Banking Companies (Chapter 5)

EXAM #1: September 26, 2013 [150 points]
PROJECT #1 Due: Oct 1, 2013 [110 points]

B. Part Two: Managing Liquidity & Bank Lending

1. Funding the Bank (Chapter 10)
2. Managing Liquidity (Chapter 11)
3. Overview of Credit Policy and Loan Characteristics (Chapter 13)
4. Evaluating Commercial Loan Requests & Managing Credit Risk (Chapter 14)
5. Evaluating Consumer Loans (Chapter 15)

EXAM #2: October 29, 2013 [150 points]

C. Part Three: Managing Interest Rate Risk & Other Activities

1. Managing Interest Rate Risk: GAP and Earnings Sensitivity (Chapter 7); Review (Chapter 6)
2. Managing Interest Rate Risk: Duration Gap and Economic Value of Equity (Chapter 8)
3. Using Derivatives to Manage Interest Rate Risk (Chapter 9)
4. Managing the Investment Portfolio (Chapter 16)
5. Global Banking Activities (Chapter 17)

EXAM #3: In class on 11-26-13 [150 points]
PROJECT 2 DUE: Thursday Dec 5th by Midnight [115 points]
Finance 360 Section 001 (11208)
Applied Portfolio Management I
Fall 2014

Instructor  Dr. Mark K. Pyles
Class       4:00 – 5:15 TR, 320 Beatty Center (T), 207 Tate Center (R)
Office      414 Beatty Center
E-mail      PylesM@cofc.edu
Phone Number 953-7991 (Office); 513-8970 (Cell)
Office Hours 12:30 AM – 1:30 PM TR
            11:00 AM - 2:00 PM W

DESCRIPTION
This course presents an opportunity for advanced students to apply investment theory in a
real world setting. Course content will center on asset valuation, portfolio analysis, and
active portfolio management. Students will obtain and cultivate knowledge related to
traditional market efficiency arguments for portfolio creation as well as behavioral
motivations. The course will use many public asset types as vehicles for investment,
including equity, debt, derivatives, funds, and real assets. Application will be
demonstrated via the real money accounts associated with the School of Business
Investment Program.

PREREQUISITES
Junior standing, FINC 303, ACCT 203, 204, ECON 200, 201, MATH 104 or 250, or
instructor permission. Students must apply for application.

OBJECTIVES
Course Objectives
Successful completion of this course will entail the student has a working knowledge in:

- financial market operations, both domestic and global
- public asset investments valuation methods
- portfolio theory
- equity, debt, derivatives and real asset trading
- portfolio creation and performance evaluation
- understanding group dynamic
- written and verbal communication
- utilizing technological tools associated with the profession

SB Objectives
Consistent with the goals of the School of Business, this course includes instruction in:

Communication Skills: Students will extensively test their ability to effectively
communicate with fellow students, instructors, and financial professionals. The
nature of the course and the associated real world application of the management
of funds requires students be prepared to defend their portfolio selections both
internally and externally to the School and College. Students will complete
numerous written and verbal reports during the course of the semester, many of
which will be shared with external groups, including College leadership, financial professionals, and potential employers.

**Quantitative Fluency:** A high level of quantitative fluency is a necessity in the field of investments. During the course, students will apply traditional mathematical tools in firm and asset valuation and portfolio performance. In addition, students will use, to a high degree, technological tools, such as Excel and Morningstar Direct, to aid in investment decisions. Doing so requires absorbing and organizing the mass amounts of quantitative information available.

**Global and Civic Responsibility:** Students will be asked to solve problems related to ethical dilemmas, encapsulated in problems related to the global investment environment. They will be asked to view issues through different lenses and gain an appreciation for the complexities involved in addressing financial situations in a global economy. Students will learn to trade securities on exchanges around the world, develop an appreciation for the similarities and differences, and recognize the benefit of developing a global investment portfolio.

**Intellectual Innovation and Creativity:** Careful attention will be devoted to placing students in a position where they must utilize resourcefulness and creativity in solving problems related to investing financial assets. Questions will be asked in ways that require the students to use the materials learned in a variety of ways, rather than repeating known processes. Such flexibility in application is a necessity in successfully addressing changing investment environments. Students will be required to address situations where changing external parameters are not only possible, but expected.

**Synthesis:** This course requires knowledge from the associated disciplines of accounting, economics, math, and statistics. As such, students are expected to apply a level of proficiency in these subject areas in their understanding of financial principles and investment applications.

**COURSE MATERIALS**

**Textbook**

The course has no set textbook, but will include a large amount of reading. Initially, students are expected to read the following books related to investment and portfolio theory.

- *A Random Walk Down Wall Street*
  By: Burton Malkiel

- *The Intelligent Investor*
  By: Benjamin Graham

- *Fooled by Randomness*
  By: Nassim Taleb

- *One Up On Wall Street*
  By: Peter Lynch

- *The Five Rules for Successful Stock Investing*
  By: Pat Dorsey/Joe Mansueto

In addition, numerous readings will be assigned throughout the course and will be provided by the instructor.
Finally, since this is an advanced course, a general level of knowledge related to finance is assumed. Thus, the following texts are suggested for use as supplemental reference.

*Fundamentals of Corporate Finance, 10/e*
  By Ross, Westerfield, and Jordan, McGraw Hill.

  By Pyles, New York: Springer Texts in Business and Economics.

*Fundamentals of Investments, 6/e*
  By Jordan, Miller, and Dolvin, McGraw-Hill.

**Calculator**
Using a calculator is a natural element of investment analysis. A financial calculator with functions such as present value and internal rate of return will be used periodically throughout the class. If you buy a new one, I highly recommend the TI BA II Plus. It is inexpensive and is considered very easy to use.

**Computer**
Students will be expected to use their personal laptop computers at times during the course. While any computer will work, it is worth noting that the School of Business Investment Program has purchased Morningstar Direct, a web-based database that interacts through downloadable software. The software currently does not work through MAC devices.

**COURSE STRUCTURE**
Unlike traditional courses, the students will direct most of the activity within the classroom. A typical class period will include reports from students pertaining to both their administrative role and their sector assignment. In an attempt to replicate the real world feel of an investment firm, students are expected to be prepared to discuss their position at any point when called upon to do so. In addition, each sector will be asked to present a suggested investment opportunity at least twice during the semester.

The course will be roughly divided into four sections. The semester will begin with a philosophical examination of what is desired in a portfolio. We will then spend approximately two weeks discussing asset analysis methods, including valuation methods and analyst report types. We will also learn to use the Morningstar Database during this period. The third section of the course is most important and includes the presentations of sector representatives. The fourth and final section is the semester wrap-up and includes both portfolio analysis and exit strategies that will carry the fund through the break.

**COURSE POLICIES**

*Rules of Conduct*
This course is unique in many facets and must be respected as such. Students are accepted into the course under the assumption they have the personal drive and ability to succeed without constant prodding. There is a large degree of self-motivation that must
come into play and will determine not only the student’s grade, but also what they obtain from the course.

Also of considerable concern is the fact that the collective cohort will make decisions that result in real financial gains or losses. While making money is not the primary concern of the course, it is a relevant factor and is absent in any other course at the College. This requires decisions to be made with extreme care and diligence. At any time the instructor feels a student is not doing so, the student may be removed from the decision-making process.

It is critically important that everyone treats the opinions of others with respect. It is natural for opinions to differ, and questioning the conclusions of others is a necessary part of the process. However, if the criticism crosses the line from constructive to destructive, the offending source will be asked to remove themselves from the decision-making process.

Honor Code
Lying, cheating, attempted cheating, and plagiarism are violations of our Honor Code that, when identified, are investigated. Each incident will be examined to determine the degree of deception involved.

Incidents where the instructor determines the student’s actions are related more to a misunderstanding will handled by the instructor. A written intervention designed to help prevent the student from repeating the error will be given to the student. The intervention, submitted by form and signed both by the instructor and the student, will be forwarded to the Dean of Students and placed in the student’s file.

Cases of suspected academic dishonesty will be reported directly by the instructor and/or others having knowledge of the incident to the Dean of Students. A student found responsible by the Honor Board for academic dishonesty will receive a XF in the course, indicating failure of the course due to academic dishonesty. This grade will appear on the student’s transcript for two years after which the student may petition for the X to be expunged. The student may also be placed on disciplinary probation, suspended (temporary removal) or expelled (permanent removal) from the College by the Honor Board.

Students should be aware that unauthorized collaboration—working together without permission— is a form of cheating. Unless the instructor specifies that students can work together on an assignment, quiz and/or test, no collaboration during the completion of the assignment is permitted. Other forms of cheating include possessing or using an unauthorized study aid (which could include accessing information via a cell phone or computer), copying from others’ exams, fabricating data, and giving unauthorized assistance.

Research conducted and/or papers written for other classes cannot be used in whole or in part for any assignment in this class without obtaining prior permission from the instructor.
Students can find the complete Honor Code and all related processes in the Student Handbook at http://studentaffairs.cofc.edu/honor-system/studenthand_book/index.php

Students with Disabilities
The College will provide reasonable accommodations for persons with documented disabilities. Students should apply at the Center for Disability Services/SNAP, located on the first floor of the Lightsey Center, Suite 104. Students approved for accommodations are responsible for notifying me as soon as possible and for contacting me one week before accommodation is needed.

ASSIGNMENTS
Students enrolled into the course will wear three hats. Each student will be assigned to a sector, defined by the S&P 500. Given the size of the cohort, there will be approximately two students assigned per sector. In this role, each group will be responsible for analyzing the sector, including key drivers and outlook. Each group will also be responsible for identifying a minimum of two securities within their sector they feel is a valid investment opportunity. Once identified, students will compile a complete valuation analysis of the asset and present their findings to the class for a vote.

In addition, each student will be assigned an officer role in the “investment company” that determines portfolio strategy and implementation. The roles will be determined, when at all possible, by the student’s area of strength and/or interest. However, there may remain instances where the instructor assigns a student a specific role. The responsibilities of each position differ and evaluation of the completion of these responsibilities will be determined at the subjection of the instructor.

Finally, each student is expected to be an ancillary participant in all class discussions and provide constructive criticism to those presenting at any point in time. This level of contribution is a critical component to the success of the course.

GRADING

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<tr>
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<tbody>
<tr>
<td>Sector Analysis</td>
<td>10%</td>
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<tr>
<td>Asset Analysis and Presentation (2x)</td>
<td>40%</td>
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<tr>
<td>Officer Assignments</td>
<td>20%</td>
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<tr>
<td>Class Participation</td>
<td>20%</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
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</tbody>
</table>

Letter grades are assigned as follows:
A = 90% - 100%
B = 80% - 89%
C = 70% - 79%
D = 60% - 69%
F = below 60%
**TENTATIVE CLASS SCHEDULE**

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
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<tbody>
<tr>
<td>Aug. 19</td>
<td>Overview of the SB Investment Program and Public Investment Fund</td>
</tr>
<tr>
<td>Aug. 21</td>
<td>Sector Presentations / Existing Asset Presentations</td>
</tr>
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<td>Aug. 26</td>
<td>Sector Presentations / Existing Asset Presentations</td>
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<tr>
<td>Aug. 28</td>
<td>Sector Presentations / Existing Asset Presentations</td>
</tr>
<tr>
<td>Sept. 2</td>
<td>Sector Asset Pitch</td>
</tr>
<tr>
<td>Sept. 4</td>
<td>JP Morgan Day</td>
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<tr>
<td>Sept. 9</td>
<td>Sector Asset Pitch</td>
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<tr>
<td>Sept. 11</td>
<td>Sector Asset Pitch</td>
</tr>
<tr>
<td>Sept. 16</td>
<td>Goldman Sachs Day (17th) Preparation</td>
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<tr>
<td>Sept. 18</td>
<td>Sector Asset Pitch</td>
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<tr>
<td>Sept. 23</td>
<td>Asset Analysis Instruction</td>
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<tr>
<td>Sept. 25</td>
<td>Asset Analysis Instruction</td>
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<tr>
<td>Sept. 30</td>
<td>Economic Overview Presentations / Market Analysis Presentations</td>
</tr>
<tr>
<td>Oct. 2</td>
<td>Portfolio Summary / Examination of Existing Positions</td>
</tr>
<tr>
<td>Oct. 7</td>
<td>Portfolio Summary / Examination of Existing Positions</td>
</tr>
<tr>
<td>Oct. 9</td>
<td>Sector Asset Pitch</td>
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<tr>
<td>Oct. 14</td>
<td>Sector Asset Pitch</td>
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<tr>
<td>Oct. 16</td>
<td>Sector Asset Pitch</td>
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<tr>
<td>Oct. 21</td>
<td>Sector Asset Pitch</td>
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<td>Oct. 23</td>
<td>CFA SC Presentation Day</td>
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<tr>
<td>Oct. 28</td>
<td>Sector Asset Pitch</td>
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<td>Oct. 30</td>
<td>Officer Role Presentations / Sector Presentations</td>
</tr>
<tr>
<td>Nov. 4</td>
<td>Fall break (no class)</td>
</tr>
<tr>
<td>Nov. 6</td>
<td>Portfolio Summary / Examination of Existing Positions</td>
</tr>
<tr>
<td>Nov. 11</td>
<td>Portfolio Summary / Examination of Existing Positions</td>
</tr>
<tr>
<td>Nov. 13</td>
<td>Portfolio Analysis and Exit Strategies</td>
</tr>
<tr>
<td>Nov. 18</td>
<td>Portfolio Analysis and Exit Strategies</td>
</tr>
<tr>
<td>Nov. 20</td>
<td>Semester Summary / Advisory Panel Presentation</td>
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<tr>
<td>Nov. 25</td>
<td>Semester Summary / Advisory Panel Presentation</td>
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COLLEGE OF CHARLESTON  
SCHOOL OF BUSINESS AND ECONOMICS  
COURSE SYLLABUS  

FINC 385, Fall 2014  
Principles of Risk Management and Insurance  
Mondays & Wednesdays 5:30 to 6:45 p.m., Room 320  

Instructor: Peter Alan Smith  

Home telephone: 843 577 9707  
Email: smithpa@cofc.edu or Psmith.harvard@gmail.com  

Office Hours: by appointment  
With the varied work schedules of most students and faculty, fixed office hours are generally inconvenient for all. As a result, I have provided my home telephone number. If you would like to meet with me, let me know and we will arrange a mutually satisfactory time. For some students, telephone "meetings" are easier. To this end, you may call me at home during reasonable hours (i.e., before 9:00 p.m.).  

Emails: I regularly send emails to convey assignments, important dates and messages. It is important to regularly check your email account for such messages.  

Textbooks:  
The following Textbooks must be purchased:  

"Fundamentals of Insurance", Tena B. Crew, Cengage/South Western, 2010, 2ND ED  
ISBN-10: 0538450150  

Hubbard, Douglas W., "The Failure of Risk Management": Why It's Broken and How to Fix It, John Wiley & Sons, 2009,  

ISBN: 978-1-118-53927-9  
*There is an optional workbook available, replete with practice questions, which will help students who require further clarification.  

Ariely, Dan, "Predictably Irrational": The Hidden Forces That Shape Our Decisions, Harper Collins publishers  
ISBN: 006135323X  

The daily reading of the Wall Street Journal is important. It is accessible via the school's library network or for a deeply discounted student rate. Student subscriptions can be found at: www.wsj.com/studentoffer
Students will be asked to bring an article of interest on a particular class related topic for presentation and discussion. **An oral presentation** of 5 to 7 minutes will be required of each student expanding on the articles premises. Topics will be discussed in class, but I would prefer that you bring insights from your own interests to the presentation.

**Reading assignments:** The "Fundamentals of Insurance" textbook is basic and straightforward. Each assigned chapter constitutes a subject that we will discuss at length in class. I will highlight important terms within the book as we go along. "The Failure of Risk Management" is a brilliantly written book on a subject that has come under strong and well deserved scrutiny in the past few years. I believe its contents will be a resource for all business students and graduates for years to come. Some of the math might seem rather complex for some students. But since this is a "principles" course, I expect students to learn the underlying concepts pertaining to risk management. I want students to come away with a broad understanding of how risk management works and how to avoid its pitfalls. Douglas Hubbard’s other master-work, "How To Measure Anything", still the #1 best seller in Amazon’s Business Math ranking, will be studied concurrently with his risk management book. There is no finer authority on risk, uncertainty, and applied metrics available today. Great news! Douglas Hubbard has agreed to respond to emailed questions regarding topics on his two books. They must be very pertinent and well thought out and cc’d to me. **Extra credit** will be given to any student who receives a response from Mr. Hubbard. His email address is:  

**The Logic of Collective Action** by Mancur Olsen remains one of the great works on group behavior whether for business, government, or social dynamics. I will cite it throughout the course and weave it into most themes. Students who can bring Olsen’s work into their own efforts will be accordingly rewarded.

Dan Ariely, author of "Predictably Irrational," has made the growing field of Behavioral Economics more easily understood for the average business person. This work has challenged many conventions about rational behavior, especially within the business, economics and risk management realms. I hope that some students will find the work so compelling that they might do their research paper on this book.

**Guest lecturers**  
I have lined up many guest lecturers to speak on topics of their expertise. Speakers availability might vary; therefore, dates are subject to change. Speaker topics to be covered include:  

- Life  
- Property and Casualty  
- Lloyd’s of London  
- Captive and Reinsurance Markets  
- Maritime  
- Insurance Careers  
- Establishing an Agency  
- IT/Social Media Risk  
- Insurance Fraud  

**Format for the Paper:**  
A paper on the insurance or risk topic of your choice is due in late April. It should be between 5 and 7 pages (not including bibliography). I do not need a paper hard-copy.
Format for the Paper: continued
Double space, with a 12 point font, and cite your sources. When in doubt about whether to acknowledge the work of others, always opt to cite it! Occasionally, I will print out a paper for my colleagues.

COURSE DESCRIPTION:

Risks and uncertainty are pervasive in every aspect of business and life. The field of insurance is as wide ranging as life itself. We are going to make the concept of Risk more tangible. We are going to examine many diverse types of insurance products and Risk Management procedures. Some of these are very worthwhile, while others are marginally beneficial, and others are unethical or useless. Some are even worse than useless. We will learn about many of these products and procedures from the Corporate, Agent or client perspective.

Professionals in the insurance and risk management arenas have developed their own terminologies. There are many unique words used to describe insurance contracts, coverage and risk management techniques. Acronyms are widespread. Use of insurance and risk management terminology will be encouraged in class, on exams and assignments. Much of your grade will develop from your mastering this vocabulary!

Between the basic study of insurance products and the steady absorption of risk management dynamics, you will be thoroughly immersed in the fascinating world of insurance!

COURSE Goals:
By the completion of this course, You will:

- Gain knowledge of a wide range of insurance products and terminologies
- Become more calibrated in making estimations and predictions
- Understand The psychology of risk with regard to statistics and behavioral economics
- Determine the inherent risks present in your academic field of study or interest
- Learn how to properly measure and model risks
- Understand the use of lobbying and pressure groups to mitigate risk or attain benefits
- Be exposed to a wide range of insurance and risk management careers
- Learn to avoid the diverse range of risk management faults and traps

METHOD OF EVALUATION AND GRADING SCALE:
Your grade will be determined by the following.

- Mid-term Examination 20%
- Final Examination 30%
- In-class Oral Presentation 20%
- Paper 20%
- Class Participation 10%
I will be taking attendance. It will be factored into your class participation grade along with homeworks and class interactions.

Course Syllabus

OUTLINE OF COURSE CONTENT:

Warning:
This course outline provides a general plan for the course; deviation may be necessary. Any schedule change will be announced in class and emailed to you. You are responsible for the announced change regardless of whether you are in class at the time of the announcement. This includes announcements made the first night of class. Not having received the emails in time is not an excuse!

Spring, 2014 Tentative Course Calendar

Wednesday, August 20
Lecture #1 Introduction, Homework Assignment #1 will be given, due on Wednesday, August 27

Monday, August 25
Lecture #2 The Basics - We will begin a discussion on important terminologies.
  Chapter 1 in “Fundamentals of Insurance”
  Chapter 1 in “Failure of Risk Management”
Homework Assignment #2, on Auto Insurance web sites, given, due on Monday, September 1.

Wednesday August 27
Lecture #3 More basic terms & Auto Insurance
  Chapter 2 in “Fundamentals of Insurance”
  Chapter 1 in “How to Measure Anything”
Homework Assignment #1 is Due

Monday, September 01
Lecture #4 Automobile & Homeowners Insurance
  Chapters 2 & 6 in “Fundamentals of Insurance”
  Chapter 2 in “Failure of Risk Management”
Homework #2 on Auto Insurance web sites is due.

Wednesday, September 03
Insurance Fraud, Margaret Fleming and Bryan Beason, Special Claims
Investigators for Farm Bureau Insurance, will discuss insurance fraud.
  Chapter 2 in “How to Measure Anything”
Homework #4 Assignment on Campus Risks given due on Wednesday, September 15.

Monday September 08
Randy Beaver, Health, Safety and Emergency Manager for the College of Charleston will be a guest speaker
  Homework #5, providing your presentation topic and article url, is announced, due Monday, September 22.
Wednesday, September 10
Paul Steadman will discuss Commercial Lines Property & Casualty and Business Liability Insurance.
Chapter 6 on Homeowner's Insurance, "Fundamentals of Insurance"
Chapter 2 in "The Failure of Risk Management"
Homework #3 on Schiller Group Think article is due.

Monday, September 15
Lecture #5 Homeowners Insurance
Chapter 6 on Homeowner's Insurance, "Fundamentals of Insurance"
Chapter 2 in "How to Measure Anything"
Chapter 3 in "The Failure of Risk Management"
Homework #4 on Campus Risks is due

Wednesday, September 17
Lecture #6 Health Care
Chapter 3 in "Failure of Risk Management"
Chapter 3 in "How to Measure Anything"

Monday, September 22
Lecture #7 Collective Action & Health Care
Pages 1 - 21, & 148 - 159 in Olsen's "Logic of Collective Action"
Chapter 3 in "The Failure of Risk Management"
Chapter 3 in "How to Measure Anything"
Homework #5, providing your presentation topic and article url, is due.
Presentation Schedule announced shortly thereafter.

Wednesday, September 24
Lecture #8 Worker's Compensation and Disability Insurance
Chapter 4 in "The Failure of Risk Management"
Chapter 4 in "Fundamentals of Insurance" on Worker's Compensation.
Chapter 8 in "Fundamentals of Insurance" on Disability

Monday, September 29
Mid-Term Examination, 5:30 – 6:45 p.m.
*Please note that no one can leave the room until they hand in their exam!

Wednesday, October 01
Oral Presentations Round 1

Monday, October 06
Presentations Round 2
Chapter 4 in The Failure of Risk Management
Chapter 3 in How To Measure Anything

Wednesday, October 08
Presentations Round 3

Monday, October 13
Jason Odgers from Roanoke Trade will talk with us on Maritime Risks and Insurance.

Wednesday, October 15
Jamey Mellis from Computer Solutions will discuss Information Technology risks
Chapter 4 in The Failure of Risk Management
Chapter 3 in How To Measure Anything

Monday, October 20
Oral Presentations Round 4

Wednesday, October 22
Oral Presentations Round 5
Chapter 5 in "The Failure of Risk Management"
Chapter 4 in "How To Measure Anything"
HW#6 Persi Mathematician given, due on Wednesday, October 29

Monday, October 27
Lecture #9, Life Insurance
Chapter 7 on Life Insurance in "Fundamentals of Insurance"
Chapter 6 in "The Failure of Risk Management"

Wednesday, October 29
Lecture #10, Life Insurance
Chapter 7 on Life Insurance in "Fundamentals of Insurance"
Chapter 5 How to Measure Anything
Homework #6 on Persi Mathematician due
Homework #7 on Confidence Intervals given, due Wednesday, November 12

Monday, November 03
Fall Break, No class

Wednesday, November 05
Guest Speaker, Eric Cox, from Atlantic Coast Advisory Group will discuss financial planning & life insurance. Be sure to have finished Chapter 7 in "Fundamentals of Insurance"
Chapter 7 in "The Failure of Risk Management"

Course Syllabus
Chapter 8 The Failure of Risk Management
Chapter 6 How to Measure Anything

Wednesday, November 12
Captives 101
Guest speaker, Brian Johnson, from Bartlett Actuarial, will give us an overview of the Captive Insurance markets from a Charleston perspective.
Homework #7 on Confidence Intervals is due.

Monday, November 17
Jason Luck, Captive Market Attorney, will talk on Captives, Claims and Legislation

Wednesday, November 19
Guest Lecturer and Author Douglas Hubbard will talk about his books.
Chapters 1-6 How to Measure Anything
Chapters 1-8 The Failure of Risk Management

Monday, November 24
Lecture #12 Bringing It All Together
Chapters 1 & 2 of Ariely’s “Predictably Irrational” must be completed.
Chapter 8 in “The Failure of Risk Management”
Chapter 6 in “How to Measure Anything”

Wednesday, November 26
Thanksgiving Break, No Class

Monday, December 01
Mike Veeck, Owner of the Charleston Riverdogs will tell us why he hates Insurance!
Papers are due.

Wednesday, December 10, 4:00 p.m. – 7:00 p.m.
*Final Examination Room 320

*Please note that no one can leave the classroom during an exam, for any reason, until they have finished their work and handed in the exam. All students are responsible for all assignment deadlines. Late assignments will suffer a penalty of 10% per day.

Course Syllabus

Academic Honesty:
It is your responsibility to read the University Policy on Academic Honesty.
This document establishes clear standards for academic honesty and it will be enforced in this course. My policy is completely consistent with that document. Here is my position. A University can successfully function only when its integrity is maintained. One important element of integrity is personal honesty. Cheating, a form of personal dishonesty is unfair to students who do not cheat because their performance may appear relatively inferior, and it is unfair to students who do cheat because it short circuits the learning process. In short, cheating is a cancer that invades and subverts the legitimate academic process. It cannot be tolerated at any level. Consequently, my position is simple. All work must be your own. Any student found using work prepared by others (including students from prior classes), copying during exams, signing someone else's name to an attendance list, or attempting in any way to promote the work of others as his or her own will receive an F for the course. Note that a person providing assistance is equally as guilty of cheating as the recipient of the assistance. In addition, I will make every effort to see that the guilty party receives the most severe University disciplinary action appropriate. There will be no exceptions or second chances. Period!

**Classroom Code of Conduct:** You are expected to abide by the Classroom Code described in your Student Handbook. Students will advise the professor if deviations from expected behavior are needed.

Since I will not be able to view visual attempts to gain my attention, we will work out a means by which a classroom discussion can be facilitated.

**Please turn off your mobile phones upon entering the classroom. Texting is rude and not allowed!**
Your First Homework Assignment: Due, Wednesday, August 27.

Please email me at

psmith.harvard@gmail.com or smithpa@cofc.edu

The following information about yourself: (it will remain confidential!)

Name: First, Middle Initial, Last

How you would like to be called.

Phone #(s)

Preferred email address

Major(s)

Junior, Senior, etc.

Any employment during semester?

Hometown(s): Where you have lived or traveled?

Interests (inside or outside of academia)

Your career goals?

Other pertinent information
FINC 389 Section 02
Financial Management Information Systems, Fall 2014
Beatty Center 214, 1:00-1:50 pm, Mondays, Wednesdays & Fridays

Professor: James Malm, Ph.D.
Office: Beatty Center 416
Office hours: M & W 10:00 am-11:30 am, M & W 2:00-3:00 pm & By Appointment
Phone: 843-953-5192
Email: malmj@cofc.edu


Course Description

This course is an introduction to financial modeling. The course is designed for students planning careers in the following areas of finance: corporate finance, private equity, venture capital, investments, financial planning, banking, risk management and real estate. The main focus of the course is to link the theory of finance to real-world and usable spreadsheet models that would help financial managers with decision making in the firm. The course will examine modeling in corporate finance, fixed income securities, portfolio management, and option pricing. Students will also be introduced to optimization models as well as various forecasting and sensitivity analysis techniques.

Course Objectives

The student will learn to develop financial models in Excel and develop a practical understanding of the financial theory underlying the models. Students will also learn to use financial models and theory to address a variety of business problems and will clearly and concisely communicate their findings from the financial models.

School of Business Objectives

Consistent with the goals of the School of Business, this course includes instruction in:
Quantitative Fluency: The course requires extensive aptitude in comprehending and implementing strategies to solve practical quantitative problems. This aptitude is a readily transferable skill to other areas.
Global and Civic Responsibility: The course covers topics that require understanding of the appropriate response to legal and ethical problems and an understanding of the legal and social ramifications of financial decision making. The course requires an understanding of international implications of managerial finance.
Communication Skills: The course instructs on the ability to communicate relatively complex quantitative data and results to both financially educated and uneducated individuals.
Synthesis: Concepts from accounting, economics, and statistics will be applied throughout the course to solve financial problems. The ability to synthesize information from these disciplines and others is essential.

Prerequisites

Students should have either taken CS 102 or have the equivalent knowledge.
Class Format

The class format will include classroom lectures and discussions of theoretical material as well as computer lab sessions devoted to the development of financial models in Excel. Both the classroom lectures and the computer lab sessions will be conducted in the assigned classroom.

Quizzes, Project Assignments and Exams

Quizzes and Assignments

There will be approximately 13 weekly quizzes but only 10 will count towards your grade. Each student must complete all the quizzes. The purpose of giving quizzes is to encourage you to keep up with the material. The quizzes will provide an opportunity to for you to practice applying the concept learned in this course to real world situations. The quizzes will emphasize financial models and techniques previously shown in class. There will be no opportunities to make up quizzes. The content of the quizzes will be announced in class.

Team Work and Project Assignments

There will be three project assignments. These project assignments must be completed in teams. You must work on the assignments in teams of 4 to 5 persons and hand in the assignments as a team. The cover page for each memorandum must identify the names of the team members who participated in developing the model and in the preparation of the memorandum. Your teams are self-selected, and you can change the composition for each project assignment if desired. For each project assignment, team members must submit the Excel file for the model as well as 1 page narrative memorandum that summarizes the solution and explains the model. The assigned models will provide an opportunity to practice the concepts learned in class to real world situations. You are expected to submit the assignment by the schedule date. Late assignments will not be accepted for grading. You should assume you are writing the memorandum to a high-level executive with limited time. The standards for grading are summarized in the table below:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Model (70%)</th>
<th>Memorandum (30%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Model works, is well-structured and easy to follow</td>
<td>Memorandum is well-structured, well written, concise and analysis shows serious thought</td>
</tr>
<tr>
<td>A-</td>
<td>Model works, but is poorly structured and/or contains minor errors</td>
<td>Memorandum is reasonably well written and organized. Analysis shows some thought.</td>
</tr>
<tr>
<td>B+</td>
<td>Model almost works, but contains somewhat significant errors</td>
<td>Memorandum is poorly organized. Prose rambles and analysis shows little thought</td>
</tr>
<tr>
<td>B</td>
<td>Model does not work correctly</td>
<td>Memorandum is poorly organized. Prose difficult to follow and analysis lacking thought</td>
</tr>
<tr>
<td>B-</td>
<td>Model is incomplete</td>
<td>Memorandum is poorly organized. Prose rambles and analysis is lacking or incorrect</td>
</tr>
</tbody>
</table>

Final Exam

There will be a final exam in this course on the date scheduled by the University for the class meeting date and time. The final exam will test your knowledge of material covered in the readings, lectures, lab sessions and assignments. You are responsible for taking the final exam on the designated date.
Lecture Notes

Lecture slides and other course documents will be posted on the course website. Check the site on a daily basis in order to keep up with the course. Lecture slides are provided as an enhancement to and not a replacement for class lectures.

Grading Policy

Course grades will be determined by total points earned in the course from exams, quizzes, and class participation.

<table>
<thead>
<tr>
<th>Item</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inclass/Participation</td>
<td>5%</td>
</tr>
<tr>
<td>Tests (Top 10 Quizzes)</td>
<td>25%</td>
</tr>
<tr>
<td>Project 1</td>
<td>15%</td>
</tr>
<tr>
<td>Project 2</td>
<td>15%</td>
</tr>
<tr>
<td>Project 3</td>
<td>15%</td>
</tr>
<tr>
<td>Final Exam</td>
<td>25%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>

Grades will be assigned as follows:

<table>
<thead>
<tr>
<th>Letter Grade</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>90-100%</td>
</tr>
<tr>
<td>A-</td>
<td>88-89.99%</td>
</tr>
<tr>
<td>B+</td>
<td>86-87.99%</td>
</tr>
<tr>
<td>B</td>
<td>83-85.99%</td>
</tr>
<tr>
<td>B-</td>
<td>80-82.99%</td>
</tr>
<tr>
<td>C+</td>
<td>76-79.99%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Letter Grade</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>72-75.99%</td>
</tr>
<tr>
<td>C-</td>
<td>70-71.99%</td>
</tr>
<tr>
<td>D+</td>
<td>66-69.99%</td>
</tr>
<tr>
<td>D</td>
<td>62-65.99%</td>
</tr>
<tr>
<td>D-</td>
<td>60-61.99%</td>
</tr>
<tr>
<td>F</td>
<td>0-59.99%</td>
</tr>
</tbody>
</table>

Policy on Missed Exams & Coursework

Exam attendance is mandatory, and makeup exams will only be given under extenuating circumstances. If extenuating circumstances cause you to miss an exam, then you must contact me by 5:00 pm the day following the exam; otherwise, your exam grade is zero. If you make contact, and the extenuating circumstances you describe are deemed valid, then you will be allowed to take a makeup exam. Makeup exams must be completed as soon as possible and in almost all cases, before the next exam.

Attendance Policy

Regular, on time attendance is expected for this class. Attendance will be recorded.

Center for Student Learning

I encourage you to utilize the Center for Student Learning's (CSL) academic support services for assistance in study strategies, speaking & writing skills, and course content. They offer tutoring, Supplemental Instruction, study skills appointments, and workshops. Students of all abilities have become more successful using these programs throughout their academic career and the services are available to you at no additional cost. For more information regarding these services please visit the CSL website at [http://csl.cofc.edu](http://csl.cofc.edu) or call (843)953-5635.
Students with disabilities

The College will make reasonable accommodations for persons with documented disabilities. Students should apply at the Center for Disability Services/SNAP, located on the first floor of the Lightsey Center, Suite 104. Students approved for accommodations are responsible for notifying me as soon as possible and for contacting me one week before accommodation is needed.

College of Charleston Honor Code and Academic Integrity

Lying, cheating, attempted cheating, and plagiarism are violations of our Honor Code that, when identified, are investigated. Each incident will be examined to determine the degree of deception involved.

Incidents where the instructor determines the student’s actions are related more to a misunderstanding will handled by the instructor. A written intervention designed to help prevent the student from repeating the error will be given to the student. The intervention, submitted by form and signed both by the instructor and the student, will be forwarded to the Dean of Students and placed in the student’s file.

Cases of suspected academic dishonesty will be reported directly by the instructor and/or others having knowledge of the incident to the Dean of Students. A student found responsible by the Honor Board for academic dishonesty will receive a XF in the course, indicating failure of the course due to academic dishonesty. This grade will appear on the student’s transcript for two years after which the student may petition for the X to be expunged. The student may also be placed on disciplinary probation, suspended (temporary removal) or expelled (permanent removal) from the College by the Honor Board.

Students should be aware that unauthorized collaboration—working together without permission—is a form of cheating. Unless the instructor specifies that students can work together on an assignment, quiz and/or test, no collaboration during the completion of the assignment is permitted. Other forms of cheating include possessing or using an unauthorized study aid (which could include accessing information via a cell phone or computer), copying from others’ exams, fabricating data, and giving unauthorized assistance.

Research conducted and/or papers written for other classes cannot be used in whole or in part for any assignment in this class without obtaining prior permission from the instructor.

Students can find the complete Honor Code and all related processes in the Student Handbook at http://studentaffairs.cofc.edu/honor-system/studenthandbook/index.php
**Tentative Class Schedule**

Below are topics and reading assignments. You are expected to attend all classes and to arrive on time.

<table>
<thead>
<tr>
<th>Date</th>
<th>Lecture</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/20</td>
<td>1</td>
<td>Syllabus; Course Intro &amp; Overview of Financial Modeling</td>
</tr>
<tr>
<td>08/22</td>
<td>1</td>
<td>Basic Excel Operations</td>
</tr>
<tr>
<td>08/25</td>
<td>2</td>
<td>Time Value of Money: Part I</td>
</tr>
<tr>
<td>08/27</td>
<td>2</td>
<td>Time Value of Money: Part II</td>
</tr>
<tr>
<td>08/29</td>
<td></td>
<td>Quiz 1</td>
</tr>
<tr>
<td>09/01</td>
<td>3</td>
<td>Amortization Table</td>
</tr>
<tr>
<td>09/03</td>
<td>4</td>
<td>Intro to Macros: User Defined Function: Part I</td>
</tr>
<tr>
<td>09/05</td>
<td></td>
<td>Quiz 2</td>
</tr>
<tr>
<td>09/08</td>
<td>5</td>
<td>Stock Valuation: Part I</td>
</tr>
<tr>
<td>09/10</td>
<td>5</td>
<td>Stock Valuation: Part II</td>
</tr>
<tr>
<td>09/12</td>
<td></td>
<td>Quiz 3</td>
</tr>
<tr>
<td>09/15</td>
<td>6</td>
<td>Capital Budgeting: Part I</td>
</tr>
<tr>
<td>09/17</td>
<td>6</td>
<td>Capital Budgeting: Part II</td>
</tr>
<tr>
<td>09/19</td>
<td></td>
<td>Quiz 4</td>
</tr>
<tr>
<td>09/22</td>
<td>7</td>
<td>Pivot Tables: Part I</td>
</tr>
<tr>
<td>09/24</td>
<td>7</td>
<td>Pivot Tables: Part II</td>
</tr>
<tr>
<td>09/26</td>
<td></td>
<td>Quiz 5</td>
</tr>
<tr>
<td>09/29</td>
<td></td>
<td>Portfolio Management: Part I</td>
</tr>
<tr>
<td>10/01</td>
<td></td>
<td>Portfolio Management: Part II</td>
</tr>
<tr>
<td>10/03</td>
<td></td>
<td>Quiz 6</td>
</tr>
<tr>
<td>10/06</td>
<td>8</td>
<td>Portfolio Management: Part III</td>
</tr>
<tr>
<td>10/08</td>
<td>8</td>
<td>Portfolio Management: Part IV</td>
</tr>
<tr>
<td>10/10</td>
<td></td>
<td>Quiz 7</td>
</tr>
<tr>
<td>10/13</td>
<td>9</td>
<td>Statistical Analysis: Part I</td>
</tr>
<tr>
<td>10/15</td>
<td>9</td>
<td>Statistical Analysis: Part II</td>
</tr>
<tr>
<td>10/17</td>
<td></td>
<td>Quiz 8</td>
</tr>
<tr>
<td>10/20</td>
<td>10</td>
<td>Introduction to Option: Part I</td>
</tr>
<tr>
<td>10/22</td>
<td>10</td>
<td>Black-Scholes Option Pricing: Part II</td>
</tr>
<tr>
<td>10/24</td>
<td></td>
<td>Quiz 9</td>
</tr>
<tr>
<td>10/27</td>
<td>11</td>
<td>Mortgage Refinancing: Part I</td>
</tr>
<tr>
<td>10/29</td>
<td>11</td>
<td>Mortgage Refinancing: Part II</td>
</tr>
<tr>
<td>10/31</td>
<td></td>
<td>Quiz 10</td>
</tr>
<tr>
<td>11/03</td>
<td>12</td>
<td>Fall Break: NO CLASS</td>
</tr>
<tr>
<td>11/05</td>
<td>12</td>
<td>Retirement Fund Modeling</td>
</tr>
<tr>
<td>11/07</td>
<td></td>
<td>Quiz 11</td>
</tr>
<tr>
<td>11/10</td>
<td>13</td>
<td>Excel Solver Applications: Part I</td>
</tr>
<tr>
<td>11/12</td>
<td>13</td>
<td>Excel Solver Applications: Part II</td>
</tr>
<tr>
<td>11/14</td>
<td></td>
<td>Quiz 12</td>
</tr>
<tr>
<td>11/17</td>
<td>14</td>
<td>More Excel Functions - Part I: Vlookup, Hlookup, Logical functions</td>
</tr>
<tr>
<td>11/19</td>
<td>14</td>
<td>More Excel Functions - Part II: Sorting, Filtering, Countif, Averageif, Data Table</td>
</tr>
<tr>
<td>11/21</td>
<td></td>
<td>Quiz 13</td>
</tr>
<tr>
<td>11/24</td>
<td>15</td>
<td>WACC &amp; Recording Macros</td>
</tr>
<tr>
<td>11/26</td>
<td></td>
<td>Thanksgiving Holiday (No Classes)</td>
</tr>
<tr>
<td>11/28</td>
<td></td>
<td>Thanksgiving Holiday (No Classes)</td>
</tr>
<tr>
<td>12/01</td>
<td>16</td>
<td>Review for Finals</td>
</tr>
<tr>
<td>12/08</td>
<td></td>
<td>Final Exams 12:00 - 3:00 PM</td>
</tr>
</tbody>
</table>
College of Charleston
Urban Design Studio
HPCP 315
Fall, 2012

Instructor: Tim Keane
843.609.6207
keanet@charleston.com
Office: 75 Calhoun Street (Planning, Preservation and Sustainability)

Office Hours: By Appointment

Grading Criteria
1/3 Class Attendance and Participation
1/3 Completion and Thoroughness of Design Projects
1/3 Discussion and Testing on Lecture Material and Readings

This is a studio course – which requires initiative of each student. Class participation and independent studio time are essential. Each student will be responsible for production of sketches and specific urban design-related drawings. This will require time outside the regularly scheduled three-hour studio period. All instructors say that individual student initiative and class participation are critical for grading. This is because it is true – and particularly in a studio course where lectures and conventional tests are limited.

Course Readings
Assigned from multiple texts.

Other Equipment Needed
List provided separately.

Outline of Topics to be Covered

Urban Pattern Analysis
  Public Spaces
  Buildings
Site Analysis
  Environmental
  Contextual
Site Design
  Design Processes
  Plan Drawing
  Design Principles
Urban Design Drawings
  Scale
  Plans
  Sections
Approach to Course Topics

1. Throughout history, human settlements have taken on a tremendous variety of forms. This is not a survey intended to familiarize students with all of those settlement patterns, but rather to give understanding to the basics of urban patterns of America, with specific emphasis on the settlement of the Lowcountry, because of the exemplary patterns found here and there profound implications for planning in the south and America generally.

2. It will be understood that despite the many forms of settlement, we will generally divide our discussion into two categories, pre-industrial and post-industrial. For this course, we will generally assume that post-industrial planning and urban design have yielded cities and towns which (1) consume land and natural resources at an unsustainable rate (2) increase and sustain our dependence on petroleum (3) engender social isolation and (4) have exceptionally poor aesthetic qualities.

3. While pre-industrial towns have many superior qualities, inhabiting these spaces requires accommodation of modern realities such as transportation by car. In this course, we will analyze urban patterns for their successes and failures, and learn how we can (1) accommodate dense settlement in existing cities and (2) create new patterns which have the best qualities of pre-industrial settlement while accommodating modern lifestyle requirements.

4. This course will function independent of discussions of architectural style. We will give no instruction regarding the qualities of traditional or modern design, but will instead limit our architectural discourse to an understanding of building types and their application along the transect of urban intensity.

Schedule

Studio is each Wednesday afternoon starting at 4 pm from August 22 through November 28. There is no studio on November 21 as this is Thanksgiving break. Of course October 29 is the last day to officially drop a class and receive a W.

Studio will be held at 12 Bull Street unless otherwise scheduled.
Instructor Information:

Dr. Brumby McLeod, Assistant Professor
College of Charleston
School of Business
Department of Hospitality & Tourism Management
Beatty, Room 326
843-708-8814 (mobile)  mcleodb@cofc.edu (email)

Course Catalog Description:

This course examines hotel and resort management issues emphasizing general management, service, sales, forecasting, financial aspects, rate efficiencies, labor management and guest relations. See the Course Overview below for details.

Class Time and Location:

HTMT 351-01 (10766): Tuesday & Thursday from 9:25 to 10:40 AM, BCTR 212
HTMT 351-02 (12565): Tuesday & Thursday from 12:15 to 1:30 PM, BCTR 212

Office hours:

Tuesday & Thursday from 11:00 AM to noon for walk-ins, or by appointment anytime.

Prerequisites:

HTMT 210 & Junior Status (60 credit hours).

Required Textbook:

None.

OAKS:

The learning management system OAKS (a.k.a. Desire 2 Learn) is heavily utilized in this course. Grades, general communication, electronic documents, assignments, discussions, and exams are managed on this platform throughout the semester. Please develop a habit of checking the course management software frequently. Your current grade is also maintained in this system. An overview about my use of OAKS will be provided within the first few class sessions.

Course Overview:

This course is organized around four content modules: (1) Industry Overview, (2) Sales & Marketing, (3) Lodging Operations, (4) Fiscal Matters.

My course instruction style utilizes lectures, class exercises, guest speakers, discussions, assignments, and exams. The typical class will consist of a lecture and discussion about a current topic with extensive supplements from industry. Resources and materials will be shared from industry organizations such as the American Hotel & Lodging Association (AHLA), Smith Travel Research (STR), the World Tourism Organization (WTO), Travel Industry Association (TIA), Hospitality Valuation Services (HVS) and numerous industry publications such as Lodging, Hotel & Motel Management, and Developments. These supplementary materials are critical to the learning experience.
The notes from the lectures will NOT be provided to students. Students are required to attend and participate in class discussion to acquire the necessary materials for success in the course. Class exercises are used to expand beyond the classroom, to promote attendance, and to demonstrate understanding of the material. Assignments are used to benchmark your learning, demonstrate application of the material, improve retention, and migrate beyond the classroom.

School of Business Learning Goals:

All of the Business Learning Goals listed below are addressed in this course via assignments and class exercises.

Effective Communications—Students will demonstrate the ability, via both written and spoken word, to effectively present, critique, and defend ideas in a cogent, persuasive manner.

Quantitative Fluency—Students will demonstrate competency in logical reasoning and data analysis skills.

Global and Civic Responsibility—Students will be able to identify and define social, ethical, environmental and economic challenges at local, national and international levels. Students will also be able to integrate knowledge and skills in addressing these issues.

Intellectual Innovation and Creativity—Students will be able to demonstrate their resourcefulness and originality in addressing extemporaneous problems.

Synthesis—Students will demonstrate the ability to integrate knowledge from multiple disciplines incorporating learning from both classroom and non-classroom settings in the completion of complex and comprehensive tasks.

Learning Outcomes:

During classroom discussions students will incorporate key operating ratios, traditional hotel classifications, common hotel design features, typical organization structures, and other lodging terminology to demonstrate their knowledge about the industry.

Throughout the course, students will calculate key operating ratios through repetitive practice and discussion. This ability will be enhanced by openly discussing challenges associated with using these ratios to compare properties and organizations.

Students will be able to diagram and describe the traditional reservation system utilized by lodging organizations, distinguish key differences in transient versus group reservations, and prepare and explain a simple and adjusted room forecast.

Students will recognize the importance of quality in lodging operations by learning to identify, categorize, inspect, and measure key characteristics regarding products and services. Students will be able to comfortably identify guest needs by developing a service blueprint of a typical stay from search to future stays.

Students will be able to articulate the importance of room rates and their importance in the hotel revenue cycle. Through lectures and discussions, students will be exposed to key concerns regarding these processes.

Students will learn to develop and narrate an operating budget. In addition, students will be able to modify assumptions to the budget and describe their impact on the P&L statement.
Class Exercises:

Class exercises are provided to practice, reinforce, and detail concepts discussed in lectures. The concepts and problems from the exercises are included on the exams. Twelve class exercises will be given during the course for a combined value of 20% of your overall grade; the two lowest will be dropped. There are no make-ups or excused absences for class exercises.

Assignments:

Three assignments are required during the course; details are provided in OAKS at the appropriate time. Each assignment takes several weeks to complete. They require extensive application of the material discussed in class. The first assignment is a hotel property profile. The second assignment is a market analysis. The third assignment is the creation and narration of an operating budget. The assignments are worth 10% each for a combined 30% of your overall grade.

Exams:

There are two exams in this course: a mid-term and a comprehensive final exam. The first is worth 20% the second exam is worth 30%.

Grade Determination:

<table>
<thead>
<tr>
<th>Class Exercises</th>
<th>20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignments</td>
<td>30%</td>
</tr>
<tr>
<td>Mid-term Exam</td>
<td>20%</td>
</tr>
<tr>
<td>Final Exam</td>
<td>30%</td>
</tr>
</tbody>
</table>

Grading Scale:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>94 or above</td>
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<tr>
<td>A-</td>
<td>90 - 93</td>
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<tr>
<td>B+</td>
<td>87 - 89</td>
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<tr>
<td>B</td>
<td>83 - 86</td>
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<tr>
<td>C+</td>
<td>77 - 79</td>
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<td>C</td>
<td>73 - 76</td>
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<tr>
<td>D</td>
<td>60 - 69</td>
</tr>
<tr>
<td>F</td>
<td>Below 60</td>
</tr>
</tbody>
</table>

Honor Code and Academic Integrity:

Lying, cheating, attempted cheating, and plagiarism are violations of our Honor Code that, when identified, are investigated. Each incident will be examined to determine the degree of deception involved.

Incidents where the instructor determines the student's actions are related more to a misunderstanding will handled by the instructor. A written intervention designed to help prevent the student from repeating the error will be given to the student. The intervention, submitted by form and signed both by the instructor and the student, will be forwarded to the Dean of Students and placed in the student's file.

Cases of suspected academic dishonesty will be reported directly by the instructor and/or others having knowledge of the incident to the Dean of Students. A student found responsible by the Honor Board for academic dishonesty will receive a XF in the course, indicating failure of the course due to academic dishonesty. This grade will appear on the student's transcript for two years after which the student may petition for the X to be expunged. The student may also be placed on disciplinary probation, suspended (temporary removal) or expelled (permanent removal) from the College by the Honor Board.
Students should be aware that unauthorized collaboration—working together without permission—is a form of cheating. Unless the instructor specifies that students can work together on an assignment, quiz and/or test, no collaboration during the completion of the assignment is permitted.

Other forms of cheating include possessing or using an unauthorized study aid (which could include accessing information via a cell phone or computer), copying from others’ exams, fabricating data, and giving unauthorized assistance.

Research conducted and/or papers written for other classes cannot be used in whole or in part for any assignment in this class without obtaining prior permission from the instructor.

Students can find the complete Honor Code and all related processes in the Student Handbook for Academic Year 2014-2015: http://studentaffairs.cofc.edu/honor-system/studenthandbook/index.php

Disability Services:

Students approved for SNAP (Students Needing Access Parity) Services are instructed to meet with each of their professors during the first two weeks of classes or as soon as they are approved for services to discuss accommodations and present a copy of their SNAP-issued Professor Notification Letter (PNL).

The College will make reasonable accommodations for persons with documented disabilities. Students should apply at the Center for Disability Services / SNAP, located on the first floor of the Lightsey Center, Suite 104. Students approved for accommodations are responsible for notifying me during my office hours within the drop add period.
## Classroom Lecture Schedule:

### Module I: Industry Overview
- Introduction
- History of the American Hotel
- Great Hoteliers
- The Hotel Business
- Measuring Hotel Performance
- Management Contracts

### Module II: Sales & Marketing
- Distribution Channels
- Revenue Management
- Competitor Analysis
- Room Inventory (Day of Arrival)
- Market Segments
- Mid-term Exam
- Market Analysis

### Module III: Hotel Operations
- Organizational Structures
- Guest Services & Quality Assurance
- Human Resources
- Front Office Management
- Housekeeping
- Maintenance & Engineering
- Food & Beverage
- Safety & Security

### Module IV: Fiscal Matters
- Budgeting (Operating and Capital)
- Financial Statements
- Hotel Accounting and Operating Statements
- Acquisitions
- Development
- Final Exam

Assignment 1 released
Assignment 2 released
Assignment 3 released
Introduction to Critical Urban Policy Analysis
POLS 306

Spring 2011
Tuesdays and Thursdays, 12:15 p.m. to 1:30 p.m.
Maybank Hall, Room 307

Kevin Keenan
Office: 114 Wentworth, Room 105
Phone: (843) 953-5679

Email: KeenanK@cofc.edu
Office hours: M: 10 AM to 12 PM;
T: 1:30 to 3:30 PM & By appointment

Course Description
This course provides students with an introduction to the urban policy process, a critical assessment of that process, and a survey of the major urban issues that policy is currently and has historically been developed around. As an introduction to urban policy, the course focuses on how policies that are designed for and which affect U.S. cities and the people who live in them come about, who makes these policies, and what they ultimately mean for people in their everyday lives. While this course focuses on urban policy, many of the principles are applicable to any government body crafting policy, including those in suburban and rural areas. The issues—at their broadest articulation—are also applicable in nonurban areas, but their contexts, resources, and conditions will be different. As a critical interrogation, students will study the major policy areas that have dominated governmental agendas for the past 50 years: urban restructuring, housing, crime and (most recently) terrorism, education, and economic development. Through this review of major policy areas, students will learn that policy is never a simple endeavor and that straightforward formulations often have quite unintended (and sometimes nefariously intended) consequences.

Objectives
This course is designed for upper-level undergraduates. As such, the course emphasizes synthesis and evaluation skills. Synthesis means that students will be expected to hone their ability to summarize principles (not data or statistics) and concepts found in the readings and link them together to form a new piece of useful knowledge. Evaluation means that students will be expected to practice and hone their ability to break down arguments, concepts, and most importantly policies and their outcomes into the constituent parts. Students will then practice offering informed judgments about these parts, and the whole that they ultimately form as policy and as real-world affect on people’s lives. Specifically, students successfully completing this class will be able to:

- **Outline** the foundational process of forming urban policy.
- Identify and explain principles that can be used to critique urban policies.
- Discuss the major issues that have dominated urban policy for the past 50 years.

Course Philosophy

There are a couple of philosophies that underpin this course. First, the course is designed to encourage students to think about policy holistically, and to reflect on possible outcomes in both the here-and-now and in the abstract and hypothetical. Practically, this philosophy means two things for the student: (1) students will be expected to think carefully at home about readings and the principles that the readings contain. Assessments will be designed to ensure this occurs; students will craft summaries and find ways to illustrate concepts with items from the real world. There will be only one in class (final) exam; (2) The class will not read many explicit policy documents, but rather will read assessments and evaluations of those policies once they are in operation. The second philosophy that underpins this class posits the upper-level undergraduate student as in the process of completing the highest levels of their education and honing the associated skills. This means that writing and discussion are emphasized.

Course Texts

There are two main texts for this course, both of which are available in the campus bookstore.


Additional readings will be posted on OAKS.

Course Overview

11, 13 January: Introductions; syllabus review
18, 20 January: What is urban policy I?
25, 27 January: What is urban policy II?
1, 3 February: Urban restructuring I
8, 10 February: Urban restructuring II
15, 17 February: Housing: Community Development
22, 24 February: Housing: Gentrification
1, 3 March: Crime
8, 10 March: No class; Spring break
15, 17 March: Terrorism
22, 24, 28, 29 March: Education
5, 7 April: Economic Development
12, 14 April: No class; Keenan at AAG
19 April: Struggling with the Creative Class
21 April: Review and evaluations
***28 April: Final examination

Assignments & Evaluation

**Final Examination:** Examinations are just one way of giving you and me feedback on how well the learning is going. There will be one in class final examination in this course. The exam will be essay based. The exam will be given on Thursday, 28 April from 12:00 p.m. to 3:00 p.m. The examination will count towards 35% of your grade.

NOTE: There will be no make-up final exams, nor will any incomplete be issued for this course. If you miss the final exam, you must provide a documented reason for your absence within 2 business days of the exam date. With a sufficient, documented reason for absence, you will be excused from the final exam. **Absence memos are insufficient justification for missing the final exam. You must provide, directly to me, a verifiable doctor’s note that explains your illness and why it prevented you from taking the final exam.** The only other exception that will be acceptable for missing the final examination is the documented death of a family member or friend. Documentation must be provided within two business days of the exam. Further, the final exam will begin precisely at 12:00 noon; students arriving late to the exam will not receive extra time.

**Presentations on selected readings** – You are required to read all readings throughout the semester, but approximately every other class you will be responsible for presenting one reading. Presentations should reflect serious engagement with the reading. Students should be prepared to give a general, 5 minute overview of the assigned reading, and provide a 1 page handout that includes a summary of the overall message of the reading, the key points and principles in the reading, and several questions for discussion. The questions can ask for clarification on a particular point, may draw comparisons between readings, or may simply present points for general discussion. You must send me your presentation handout via email by 5:00 p.m. the day before the class so that I might read it and give you feedback. This process will help you improve your writing and synthesis
skills. The presentations will count towards **30% of your grade**. See Rubric #1: “Evaluating Presentations on the Readings” for the specific guidelines that I will use to evaluate your work.

SPECIAL NOTE: Failure to conduct your presentation on the date scheduled will result in a zero for that presentation. Your final grade on the presentations will be an average of all of your scheduled presentations. No make-ups will be issued.

**In-class participation:** The in-class participation grade will be determined by your attendance at each class, your engagement during the lectures, and your responses to questions and other students’ comments. Sleeping or putting one’s head down during the course will adversely affect the grade. Lateness—both at the beginning of the course and after the break—as well as early departures, will adversely affect the grade. The participation grade will also be determined by your willingness to speak up and share thoughts, questions, and concerns during the course and to connect constructively with the contributions of your classmates. In class participation counts as **15% of your grade**. See Rubric #2: “Evaluating In-class Participation” for the specific guidelines that I will use to evaluate your work.

**Concept / Media presentations:** To connect course material with the world beyond the classroom, another component of the course is finding and discussing news or other real-world items that illustrate concepts, ideas, or issues from the assigned reading. Each class session, at least one student who is not presenting on the readings will be asked to find a media piece, to be prepared to share it with the class on the date of the presentation, and to provide an overview in class of the concept that the media piece illustrates and how the piece does so. You are required to submit a short, two paragraph explanation of the connections that you see to me by noon the day before your presentation. Your final media presentation grade will count towards **20% of your grade**. See Rubric #3: “Evaluating student concept / media presentations” for the specific guidelines that I will use to evaluate your work.

SPECIAL NOTE: Failure to conduct your presentation on the date scheduled will result in a zero for that presentation. Your final grade on the media presentations will be an average of all of your scheduled presentations. No make-ups will be issued.

**General Policies and Procedures**

- **Statement on Academic Integrity:** The College of Charleston regards acts of academic dishonesty (e.g., plagiarism, cheating on examinations, obtaining unfair advantage, and falsification of records and official documents) as serious offenses
against the values of intellectual honesty. The Collège is committed to enforcing the Student Honor Code and the Code of Conduct. The College will pursue cases of academic dishonesty.

Complete information about the College of Charleston’s academic integrity policies is available through the Office of Student Services. Please see the following document, available online:
http://studentaffairs.cofc.edu/general_info/honor_system/index.html.

- **Student Email**: Students are required to have a College of Charleston email account and to check it at least once per day. All notices regarding the course will be sent to the College of Charleston account.

- **Faculty Email**: The professor uses KeenanK@cofc.edu and will check it at least once per day during the week. Immediate responses via email should not be expected, but can generally be expected within a 24-hour period.

- **Cell phones and pagers** may be left on, but they must be turned to silent mode.

- **Texting in class** while lecture is in progress or while people are participating is rude. It also hinders your learning. Please do not do it.

- **Chatting online, or checking facebook** while the class is in progress or while people are participating is rude. It also hinders your learning. Please do not do it.

- **Special needs or concerns**: Any students who have special learning needs or concerns are urged to speak with me during the first week of the semester if accommodations are needed. The Center for Disability Services provides a comprehensive list of accessibility resources available at the College on the following website: http://spinner.cofc.edu/~cds.

- **Mutual respect for differing questions and ideas**: The College is a place for open inquiry and exchange of ideas. All members of the College should treat all other members of the College and members of society with mutual respect and appreciation.
Course Schedule and Assigned Readings
All selections are presented in the order in which you should read them.

Part 1: What is Urban Policy

18 January (Tuesday): Defining urban policy; understanding the lineage
Cochrane, Chapters 1 “What is urban policy?” and 2 “Exploring the Roots: Race, Disorder, and Poverty”

20 January (Thursday): Understanding the lineage (cont’d); Policy formation process


25 January (Tuesday): Urban policy as Management
Cochrane, Chapter 3 “Managerialism and the City”


27 January (Thursday): Urban policy as economy

Part II: Urban Restructuring as Driver of Urban Policy

1 February (Tuesday): Changing urban landscapes
Fallows, J. "America’s Changing Economic Landscape" from *The Atlantic*.

3 February (Thursday): Federal stimulus to urban deconcentration

8 February (Tuesday): Economic stimuli to restructuring

10 February (Thursday): Thinking critically about urban restructuring

Part III: Predominant Urban Policy Areas in the last 50 years

15 February (Tuesday): Housing: Community Development – What is Community?
Cochrane, Chapter 4 “The Meaning(s) of Community”
17 February (Thursday): Housing: Community Development – What affects community?

22 February (Tuesday): Housing: Gentrification – Economy as cause

24 February (Thursday): Housing: Gentrification – The state as cause

1 March (Tuesday): Crime: Broken Windows
Cochrane, Chapter 5. “Managing Disorderly Places”

3 March (Thursday): Crime: Critiquing Broken Windows

March 8, 10 no classes; spring break

15 March (Tuesday): Terrorism
17 March (Thursday): Terrorism: Thinking critically

22 March (Tuesday): Education I
Kozol: Chapters 1 through 8.

24 March: (Thursday): Education I
Kozol: Chapters 9 through 12.

29 March (Tuesday): Education II

31 March (Thursday): Education 111 ~ Charter Schools

5 April (Tuesday): Economic Development I

7 April (Thursday): Economic Development II
Cochrane, Chapter 6 “Competitiveness, the Market and Urban Entrepreneurialism.”

**12 April and 14 April: No class; Keenan at the AAG**

**19 April (Tuesday): Struggling with the Creative Class**

Florida, R. Cities and the creative class. Chapters 1 (“Introduction”) and 2 (“Cities and the creative class”)


**21 April (Thursday): Review and evaluations**
REAL 444
Real Estate Internship
Spring 2014

Instructor: Dr. Elaine Worzala  e-mail: worzalaem@cofc.edu
Office: Beatty 112  phone: 953-8121

Office Hours: TR 9:30-10:30, Wed 9-11 or by appointment

Course prerequisites: Senior standing, a declared Business Administration Major with a
concentration in Real Estate, or a minor in Real Estate, completed REAL 310, and at least a 2.0
GPA

Course Description and Objective: The purpose of academic credit internships is two-fold.
Not only are you performing tasks for your experience provider and learning about the field in a
"real world" setting, but also there is a component that requires intellectual study of the field.
An internship is a supervised learning experience guided by your Learning Contract that requires
reflection of the correlation between the theory you have studied in the classroom and practice
and application of the theory in a professional environment.

To this end, there are certain academic requirements associated with the internship, and it is your
responsibility to fulfill these requirements according to the deadlines established by the SB and
your faculty coordinator. Simply performing well on the job will not guarantee you an "A" for
the internship.

Please note that this is a self-directed course of study designed to help prepare you for the
professional world.

You will not be reminded of assignment deadlines. It is your responsibility to abide by the
dates set forth in this Syllabus. It is your responsibility to follow up with your experience
provider to ensure your evaluations are submitted by deadline. It is your responsibility to plan
ahead for the executive interview to ensure you meet the deadline. Executives are busy, so do
not wait until the last minute, or he/she may not have time to see you. It is recommended that an
appointment with them be set.

Your grade is based on the academic work you are submitting versus your work
experience, so do not discount the importance of submitting your work in on time and
presenting your work in a professional manner.
Through the successful completion of this internship, the student will address the following School of Business Learning Goals:

**Communication Skills:** Students demonstrate the ability, both written and spoken, to effectively present, critique, and defend ideas in a cogent, persuasive manner.

**Quantitative Fluency:** Students demonstrate competency in logical reasoning and data analysis skills.

**Global and Civic Responsibility:** Students able to identify and define social, ethical, environmental and economic challenges at local, national and international levels. Students will also be able to integrate knowledge and skills in addressing these issues.

**Intellectual Innovation and Creativity:** Students demonstrate their resourcefulness and originality in addressing extemporaneous problems.

**Synthesis:** Students demonstrate the ability to integrate knowledge from multiple disciplines incorporating learning from both classroom and off-campus settings in the completion of complex and comprehensive tasks.

**Email Policy:** Students will operate under the following email guidelines:
- Expect faculty/staff to respond to emails between 9 a.m. and 5 p.m., Monday through Friday with a 48 hour lag time.
- For any concerns about grades, meet with your professor face-to-face.
- Before sending questions via email, make sure that your question is not answered on the course syllabus or website.
- Be specific about the subject of the email in the mail subject heading and use proper spelling, grammar, and punctuation. Do not begin emails with “Hey.”

**Required Hours:** All SB interns are required to adhere to the internship beginning and ending dates on their approved learning contract. A minimum of 120 hours of on-site work is required. Your final grade will be affected for early termination of your internship. Time spent on journal entries, etc. does not count towards the 120 hours. Ideally, you will spend a minimum of 12 weeks on-site (8 weeks during the summer) and work at least 10 – 12 hours per week (15 hours in the summer) with your experience provider. You may not work three 40-hour weeks. The purpose of spreading the internship over a semester is to give you an idea of the work flow in the field. End-of-year tasks, for example, are often quite different from the work you will be doing at the beginning of the semester.
Completion of the following assignments is the basis for earning grade and college credit:

1. **Weekly journal**: Students are required to keep a weekly journal identifying course concepts as applied in the workplace. The journal must be typed and double-spaced. It is to be submitted electronically by midnight on Mondays (beginning January 20th) using the OAKS drop-box set up for the course. Late entries will receive a 5-point deduction. An entry submitted after Wednesday the week it is due will be given a “zero.”

The format for the journals is as follows:

Name:
Experience provider:
Name of experience provider supervisor:
Week of:
Hours worked for the week:
Hours worked to date:

Weekly journal entry should include:
- What tasks you performed for the week with results
- Workplace observations – any thoughts on how things could/should run or how situations could have been handled differently
- Workplace activity (what is going on in the office)
- Reactions to events taking place in the office
- How classroom concepts are applied in the work environment
- What you are learning from the experience

**Important note**: Please submit your journals comprehensively with the most recent week’s entry as the first entry in the document, followed by the previous weeks’ submissions. By the end of the semester, you should have one comprehensive journal entry document with all your entries included. Please see the sample at the end of this syllabus as an example. Please label the file REAL 444_lastname_date

2. **Special project and report**: The host employer and Instructor will coordinate to select a relevant special project for assignment and completion by the student intern. Concurrent with completion of the special project, the intern will prepare an executive-level business report appropriate for submission to top management.

The report must include an Executive Summary fully supported with diagnostic research, problem identification, implications, alternative solutions, implementation strategy, recommendations; results achieved or expected outcome and bibliography of research sources. The report must have a minimum of ten (10) pages, double-spaced, not including appendices. It is submitted to the Instructor via the OAKS drop-box and is due no later than Friday, April 25th, 2014.
3. **Executive interview summary (1 required):** Students will interview one senior-level manager to understand his/her career and discuss primarily career development. Students will summarize the interview in a one (1)-page written document. It is to be submitted to the Instructor via the OAKS drop-box no later than **February 7th, 2014**.

4. **Industry Analysis:** Students will submit a three-page double-spaced industry analysis which includes information of the size and profitability of the industry, current industry conditions, ways to generate profits and cut costs related to the industry and identification of the host company’s competitors. It is to be submitted to the Instructor via the OAKS drop-box no later than **February 7th, 2014**.

**Job Performance and Satisfactory Evaluations:** The focus of the Internship is to develop practical career-related experience. Performance evaluations are completed by the host employer during and upon completion of the Internship. At least two (2) performance evaluations are documented to form the basis for grade assignment and awarding of college credit. The evaluations will be sent directly to the Host Employer by the internship office and are due **February 28th and April 25th, 2014**.

**Grading and College Credit:** The Internship Course requirements are weighted as follows for assignment of final grade and credit:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Weight</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journals</td>
<td>30%</td>
<td>Due every Monday (beginning January 20th)</td>
</tr>
<tr>
<td>Special project and report</td>
<td>30%</td>
<td>Due April 25th</td>
</tr>
<tr>
<td>Executive interview summary</td>
<td>15%</td>
<td>Due March 7th</td>
</tr>
<tr>
<td>Job performance and evaluations</td>
<td>10%</td>
<td>Due February 28th and April 25th</td>
</tr>
<tr>
<td>Industry Analysis</td>
<td>10%</td>
<td>Due February 7th</td>
</tr>
<tr>
<td>Internship Orientation</td>
<td>5%</td>
<td>Please schedule an appointment with Amy Solomon and your professor</td>
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100%

During the course, any problems having the potential to cause failure to achieve the objectives of the course must be reported to the Instructor as soon as practical. Failure to keep the Instructor informed of potential problems may result in reduced grade assignment or failure of the Internship course. Late assignment submissions will result in a deduction of points.

**Grades:** Course grades will be computed as follows:

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<tr>
<th>Grade</th>
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<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>94 – 100</td>
<td>C+</td>
<td>77 – 79</td>
<td>D-</td>
<td>60 – 63</td>
<td></td>
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<tr>
<td>A-</td>
<td>90 – 93</td>
<td>C</td>
<td>74 – 76</td>
<td>F</td>
<td>0 – 59</td>
<td></td>
<td></td>
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<tr>
<td>B+</td>
<td>87 – 89</td>
<td>C-</td>
<td>70 – 73</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>84 – 86</td>
<td>D+</td>
<td>67 – 69</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B-</td>
<td>80 – 83</td>
<td>D</td>
<td>64 – 66</td>
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</table>
**Honor Code:** The College Honor Code will guide the behavior of each student. Lying, cheating, attempted cheating, and plagiarism are violations of our Honor Code that, when identified, are investigated. Each incident will be examined to determine the degree of deception involved. Students can find the complete Honor Code and all related processes in the Student Handbook at [http://www.cofc.edu/generaldocuments/handbook.pdf](http://www.cofc.edu/generaldocuments/handbook.pdf).

**Special Note:** Misrepresenting the work you are doing with your Experience Provider in journal entries, final papers, etc. equates to academic dishonesty. Such cases will be brought before the Honor Board.

**Site Visit:** During your internship, the School may make arrangements with your experience provider for a site visit to observe your internship environment.

**Professional Attire:** As a representative of the college and of your experience provider, you are expected to dress appropriately for the work environment.

- **Men:** khakis, a shirt with a collar and a tie. Sports coats are optional.
- **Women:** nice pants or skirts of a conservative length (slightly above the knee is okay, mini-skirts are not), a nice blouse, sweater or top (as long as it’s not too tight).
- It is never okay in the office to wear t-shirts, flip-flops, outfits that show your midriff, blue jeans (unless the office has a dress-down day), cut-offs, tennis shoes and hats.
- Obviously, if your place of work has a uniform or requires a certain dress (i.e. the Riverdogs) follow their guidelines.
- Do not wear nose rings (or other visible piercings) in the workplace.

**Professional Conduct:** You would be amazed at how quickly doors close to those who “don’t know how to do.” The following are some guidelines to help you navigate etiquette pitfalls:

- **No cell phones.** You have been given the opportunity to learn, so use the time wisely.
- **No texting** – even if it’s quick.
- **No checking Facebook or Twitter online or on your phone:** You can do this when you are off the clock.
- **Saying “please” and “thank you” goes a long way with people.**
- **When the boss asks you if you want to grab a bite to eat – go!** What a great opportunity to talk one on one with someone who is in the business and would be flattered to tell you how he/she got where they are today. Saying “no” – for whatever reason sends a signal that you are uninterested.
- **Don’t interrupt.**
- **Exercise voice volume control, particularly in open cubicle spaces.**
- **Embrace grunt work.** While you are not there to solely make copies nor run out to pick up lunch, we all have a certain amount of administrative tasks that we have to do.
- Always make eye contact.
- Avoid getting attitudinal.
- When meeting someone, don’t forget to introduce yourself – first and last name, speak clearly, and shake their hand, firmly.
- Show initiative. When you have completed a project, ask for another. If you see something that needs to be done, ask your host if you may take on the task.
- Write professionally. Don’t send emails written as if you were texting.
- Watch your tone in emails to avoid sending snippy or emotional emails.
- Mind your manners.
- Own up to mistakes and accept responsibility.
- Emails are addressed in order of hierarchy within the company with the most senior staffer first. For example, president, vice-president, manager, etc. Alphabetizing the distribution list is acceptable as well.

**Issues:** It rarely happens, but sometimes there are “issues” associated with internships. This could range from experience providers using the intern as a “go-fer” versus providing a good learning experience to personality conflicts or sexual harassment. *If at any time you have an issue with the internship, contact your faculty supervisor or Amy Solomon as soon as possible.*
Weekly Journal Entries Sample
Name: Bob Jones
Experience Provider: Wilson and Sons Sportswear
Company Supervisor: Tim Wilson
Week of: December 1
Hours worked for the week: 12
Hours worked to date: 115

Over the course of the last week I watched my office responsibilities grow and was able to participate in several different projects. I feel as though this change in responsibilities comes as a result of my employers realizing I am capable of more complex tasks.

This week I was assigned the task of designing two new questionnaires, one for individual clients and the second for businesses. These questionnaires were comprised of personal questions that ranged from favorite sports teams to children’s names, in an effort to make the clients relationship with their financial advisors more personable. Following this section were questions about their financial plans, expectations and goals. I had a basic template to work from but I found my marketing research class to come into great help in the design of the questionnaire. It helped me with determining the appropriate structure, the use of skip patterns, and just general flow. My supervisor was very impressed with my work so I would say that the class prepared me for tasks similar to this.

Name: Bob Jones
Experience Provider: Wilson and Sons Sportswear
Company Supervisor: Tim Wilson
Week of: November 25
Hours worked for the week: 11
Hours worked to date: 104

This week we worked on the marketing plan, identifying the target audience. The methodology was similar to what I learned in MKTG 302. In class, we spent a lot of time on identifying demographic data. At Wilson and Sons Sportswear they rely more on psychographic data than on demographic data and gather the information through one-on-one interviews.

The target market profile is men who make between $25 and $40,000 a year, attend three sporting events a month, vote Republican and own a home. After we determined the target market profile, I called area media outlets and asked for a media kit. I remembered from my advertising class that the media kits contain audience profiles. Next week, I will make a recommendation on what local media outlets will best reach the target market.
This week I was given access to corporate revenues. I learned how to read a balance sheet in ACCT 203, and with some help from my supervisor in interpreting the data, noticed that the revenue for the men’s sportswear line had declined almost 27% from past quarter. I asked Tim about this, and he said he didn’t know why the men weren’t shopping with Wilson and Sons Sportswear any longer.

He asked me to put together some recommendations on how to reach the male audience. In MKTG research, we learned about observational research methods. I spent the remainder of the week on the sales floor looking at the shopping habits of the male customer – how many male customers were in the store per hour, what section they spent the most time in, what sections they avoided, etc. I will compile my findings and present to Tim next week.
Instructor: Dr. Kent Gourdin
Office: Room 311, Beatty Center
Office Phone: 953-5327
Email: gourdink@cofc.edu

Office Hours: by appointment

COURSE DESCRIPTION

This course examines logistics theory, concepts, and practices. Elements of the logistics system (e.g. inventory, warehousing, materials handling, packaging, and transportation) are considered singly and as parts of a larger, interactive system. While the focus will be on the handling of products in a business setting, the use of logistics by non-profit organizations and service providers will also be considered. Emphasis is on relationships and interfaces that must be recognized in the design and management of logistics systems.

COURSE OBJECTIVES

A. To develop an understanding of the basic operation of each of the components of a logistics system;

B. To develop an understanding of the interfaces of the major components of a logistics system;

C. To analyze the systems nature of the logistics process;

D. To provide an opportunity for comprehensive analysis and discussion of key contemporary problems in transportation and logistics;

E. To develop both an understanding of analytical tools useful in logistics and skill in the application of these techniques.

SCHOOL OF BUSINESS AND ECONOMICS (SB) LEARNING OBJECTIVES

Course objectives are intended to address school learning goals as discussed below. The SB learning goals are:

- **Effective Communications**: Students will write professional documents that are technically correct and concise and make effective presentations utilizing technological tools and ability utilizing relevant discipline specific knowledge.

- **Ethical Awareness**: Students will recognize and be able to appraise ethical dilemmas involved in business decisions and competently engage in discourse aimed at resolution of these dilemmas utilizing relevant discipline specific knowledge.
- **Global Awareness**: Students will recognize and examine the global implications of business decisions while evaluating and integrating innovative applications of these implications utilizing relevant discipline specific knowledge.

- **Problem Solving Ability**: Students will demonstrate critical thinking skills in identifying and evaluating problems and opportunities in the business environment and apply analytical techniques to formulate creative solutions utilizing relevant discipline specific knowledge.

**COURSE TEXTBOOK**


**EVALUATION AND GRADING POLICY**

A. The evaluation of each student is based on performance in the following areas:

1. Each student will take three exams which will be administered via Oaks on the day specified in the syllabus at a time agreed to by both the instructor and the student. All exams will consist of 10 short answer questions and will be closed book.

2. Each student will be required to submit one written case analysis as noted below on the course schedule. The paper should be typed, double-spaced, and will thoroughly address the question(s) posed at the end of each case. Additional information and format will be provided later.

3. Students will select an organization (company, non-profit, government) and examine the role and use of logistics in that organization. The instructor must approve ALL choices. Topics will be submitted to the instructor on June 13th. Papers will be NO LESS THAN 10 pages, double-spaced, and will be submitted electronically on or before July 1st.

4. Writing Lab. As writing quality will be considered in the grading of all papers, I encourage you to take advantage of the Writing Lab in the Center for Student Learning (Addlestone Library, first floor). Trained writing consultants can help with writing for all courses; they offer one-to-one consultations that address everything from brainstorming and developing ideas to crafting strong sentences and documenting sources. For more information, please call 843.953.5635 or visit [http://csl.cofc.edu/labs/writing-lab/](http://csl.cofc.edu/labs/writing-lab/).

B. These efforts are worth the following percentages of the final course grade:

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>First Midterm</td>
<td>15%</td>
</tr>
<tr>
<td>Second Midterm</td>
<td>20%</td>
</tr>
<tr>
<td>Third Midterm</td>
<td>20%</td>
</tr>
<tr>
<td>Written Case</td>
<td>20%</td>
</tr>
<tr>
<td>Term Project</td>
<td>25%</td>
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<td>100%</td>
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</table>
C. There are no predetermined cutoff points for letter grades and no predetermined percentages of various grades to be given to the class.

D. This class will be conducted on line via Oaks. Students are responsible for reading and understanding the syllabus and for meeting all due dates specified therein. There is NO provision for late work; all assignments are due at noon on the date specified.

F. Students will maintain academic integrity at all times. Cheating, fabrication or falsification of information, multiple submissions of academic work, plagiarism, abuse of academic materials, and complicity in academic dishonesty will not be tolerated. Any special requirements or permission regarding academic integrity in this course will be stated by the instructor, and are binding on the students. Academic evaluations in this course include a judgment that the student's work is free from academic dishonesty of any type, and grades in this course therefore should be and will be adversely affected by academic dishonesty. Students who violate the code can be removed from the class and The College of Charleston. The normal penalty for a first offense is zero credit on the work involving dishonesty and further substantial reduction of the course grade. In almost all cases the course grade is reduced to F. Standards of academic integrity will be enforced in this course. Students are expected to report cases of academic dishonesty to the course instructor.
## CLASS SCHEDULE

<table>
<thead>
<tr>
<th>Dates</th>
<th>Topic</th>
<th>Assignments</th>
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<tbody>
<tr>
<td>6/4-6/10</td>
<td>Logistics Concepts</td>
<td>Chapter 1</td>
</tr>
<tr>
<td></td>
<td>Logistics Concepts (Con’t)</td>
<td>Chapter 2</td>
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<td></td>
<td>Customer Service</td>
<td>Chapter 3</td>
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<td></td>
<td>Inventory Management</td>
<td>Chapter 4</td>
</tr>
<tr>
<td>6/11</td>
<td><strong>Exam</strong></td>
<td>Chaps 1-4</td>
</tr>
<tr>
<td>6/12-6/18</td>
<td>Transportation Systems</td>
<td>Chapters 5 &amp; 6</td>
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<td></td>
<td>Warehousing</td>
<td>Chapter 7</td>
</tr>
<tr>
<td>6/13</td>
<td><strong>Term Project Topics Due</strong></td>
<td>Chapter 8</td>
</tr>
<tr>
<td></td>
<td>Materials Handling &amp; Packaging</td>
<td>Chapter 9</td>
</tr>
<tr>
<td></td>
<td>Information Systems</td>
<td>Chapter 10</td>
</tr>
<tr>
<td></td>
<td>Inbound Logistics</td>
<td>Chaps 5-10</td>
</tr>
<tr>
<td>6/19</td>
<td><strong>Exam 2</strong></td>
<td>Chapter 11</td>
</tr>
<tr>
<td>6/20-6/27</td>
<td>Global Logistics</td>
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<tr>
<td>6/23</td>
<td><strong>Case Due</strong></td>
<td>Chapter 12</td>
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<td></td>
<td>Logistics Strategies</td>
<td>Chapter 13</td>
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<tr>
<td></td>
<td>Quality in Logistics and Transportation</td>
<td>Chapter 14</td>
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<td></td>
<td>Improving Logistics Performance</td>
<td>Chapter 15</td>
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<tr>
<td></td>
<td>Logistics Organizations</td>
<td></td>
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<tr>
<td>7/1</td>
<td><strong>Term Projects Due</strong></td>
<td>Chaps 11-15</td>
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<tr>
<td>7/3</td>
<td><strong>Exam 3</strong></td>
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</tbody>
</table>
Town and Country Planning, URST 320-001

Fall 2013

Date/Time: Tuesdays and Thursdays, 10:50am – 12:05pm
Location: Room 404, Bell Building
Professor: Dr. Barry Stiefel
Email: stiefelb@cofc.edu
Office Hours: Tuesdays, 3:15 - 4:15pm, Wednesdays, 9:30 - 10:30 am, Thursdays, 3:15 - 4:15pm, or by appointment
Office Location: 12 Bull Street, second floor

Course Description and Content:

To survey the field of planning in less populated areas, including towns and rural areas, as well as study cultural and natural landscapes, economic development, preservation, the history and mechanisms of planning, special/current topics in planning, and planning theory. N.B.: this is not a design class.

Class Texts:

All books can be found at University Books Of Charleston or ordered online at Amazon.com, Borders.com, etc. Also, try checking your local library and/or Inter Library Loan (this is the cheapest option). Worldcat.org is a great place to check to see what local libraries have the books that you need as well as to conduct research for your assignments.

Required:
3. *Contemporary Urban Planning*, by John M. Levy, 7th ed. or later (Chapter numbers match the 7th edition)
4. Miscellaneous websites and articles provided by me online on OAKS. These items are denoted with italics.

Assignments & Grading:

15% Class Participation & Daily Reading Notes: Each individual in the course will be expected to prepare for, attend, and participate in class. Attendance and class preparation will be graded based on the (almost) daily submission of reading notes from the assigned readings at the beginning of each class. These notes are to be a minimum of 1/2 page in length and must conclude with at least two questions that you have about the material. These notes will be
important for you to have during class and throughout the semester as a reference, so it is recommended that you submit a duplicate copy to me. The notes may be handwritten or typed.

15% Attend Planning Commission Meeting: Each individual in the course will be expected to attend one Planning Commission Meeting with a local government and write a 2-3 page paper on their observations of what took place at the meeting. This assignment is due the last day of regular classes; however, it is recommended that you complete this assignment before. Be sure to attach the meeting’s agenda and any other handouts provided at the meeting so that I can follow what took place with your report. Planning Commission Meetings can last for several hours. For this assignment you will only be expected to be in attendance for a minimum of 45 minutes (if the meeting runs longer). The following is a list of local municipal Planning Commission meetings; however, you may attend the meetings of a different municipality if you wish. Be sure to double-check the time and place of each meeting before attending for they are subject to change.

<table>
<thead>
<tr>
<th>City of Charleston</th>
<th>Town of Mt. Pleasant Municipal Complex</th>
<th>North Charleston</th>
<th>Charleston County</th>
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</thead>
<tbody>
<tr>
<td>75 Calhoun St.</td>
<td>4900 LaCross Rd.</td>
<td>4045 Bridge View Dr.</td>
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</table>

*** See the Professor if you have a conflict with your schedule for attending any of the meetings. Often these meetings are televised on a local public access station.***

20% History of a Rural Region Research Midterm Paper: Students shall select a rural region to research and write a 6-8 page paper about its development from its initial human settlement to the present. The paper should incorporate some of the themes covered in this class, as well as discuss the type(s) of cultural landscapes and land-use. For older regions, be sure to discuss what significant attributes to the region once existed in the past but are no longer extant in the present. Within the paper (not included as part of the page count) should be images and maps of the region, both past and present, which illustrate how the region has changed and developed over time in an appendix. This paper will be presented to the class and will be submitted to the Professor electronically by email. Check class schedule below for assignment due date.

25% Research Paper Related to Rural Planning: Each individual will conduct a research paper on a topic related to rural planning of their choice. Your topic selection must be approved by the Professor before commencing on your work. The paper must be 8-10 pages in length. Suggestions include:

- Thematic Analysis Paper – An explanation of a major movement, approach, or substantive theory in planning/ruralism with an emphasis on this movement/approach/theory’s influence on planning and/or on rural thought. Possibilities include but are not limited to: Utopian communities, environmental justice, threats of sprawl and urban growth, town square design, New Ruralism (in contrast to New Urbanism), Feminist planning, Transportation Planning, Preservation Planning, Sustainability, Natural Resources Planning, etc.

- Biographical Analysis Paper – A biography of a major figure in regional/ruralism with an emphasis on this person’s influence on planning as a discipline and practice and/or on
urban thought. Possibilities include but are not limited to: Thomas Jefferson, Raymond Unwin, Randall Arendt, Henry David Thoreau, John Muir, Benton MacKaye, and Frederick Law Olmsted.

- An original idea of your own as appropriate for this class.

If students prefer, they may form groups of 2-3 people to work on a group Research Paper. The group must inform the Professor of their decision, who the members are for their group, and the topic. If choosing this option, the paper must be 16-18 or 24-26 pages in length, depending on group size. Only one member of each group needs to submit the paper but every member of the group must submit a description (1-2 paragraphs) of their involvement with the group, their contribution to the paper, and evaluate their other group members. Check the class schedule below for due date, after which you will make a presentation to the class. Papers will be submitted to the Professor by email.

25% Final Exam: Bring 1-2 Blue Books to the final exam session. Expect essay questions from a list. The final exam will be cumulative and will involve all of the books read for this class.

All papers are to be double-spaced using a legible font (i.e. Times, Helvetica, Arial, etc.) at 12-points, have the standard one-inch margins on 8x11 inch paper (pictures and drawings in an appendix may be on 8x14 or 11x17). Proper citations must be used when appropriate in either Footnotes or Endnotes – the style is your discretion but must be standardized (i.e. Chicago, MLA, APA, etc.). Cover page, Table of Contents, Bibliography, Appendices are encouraged but are not counted as part of the page count for paper assignments.

<table>
<thead>
<tr>
<th>Grade Distribution</th>
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<tbody>
<tr>
<td>+100-95% A 4.0</td>
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<tr>
<td>94-90% A- 3.67</td>
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<tr>
<td>89-87% B+ 3.34</td>
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<tr>
<td>86-84% B 3.0</td>
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<tr>
<td>83-80% B- 2.67</td>
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<tr>
<td>79-77% C+ 2.34</td>
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<tr>
<td>76-74% C 2.0</td>
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<tr>
<td>73-70% C- 1.67</td>
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<tr>
<td>69-67% D+ 1.34</td>
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<tr>
<td>66-64% D 1.0</td>
</tr>
<tr>
<td>63-60% D- .67</td>
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<tr>
<td>-59% F+ .34</td>
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</table>

Please ask if you have questions or comments during the semester. The Professor also reserves the right to make changes to the syllabus during the semester due to unforeseen circumstances.
**Make Up Work Policies:**

Given the nature of this course, the expectation is that students will be able to meet all deadlines for completing all reading and writing assignments. In turn, only extraordinary or emergency circumstances will merit consideration for a deadline extension and will have to be evaluated by the Professor on a case-by-case basis. Also, please contact the Professor as soon as possible to explain any anticipated or missed deadlines.

**Honor Code:**

All academic assignments in this course are conducted under the provisions of the College of Charleston Honor Code. In particular, while students will collaborate during group discussions of the material and their work, when it comes to assembling their initial problem set/exercise/essay responses and taking module exams, students are expected to work independently. Blatant plagiarism and/or cheating are grounds for failure within the class and will be reported to the College of Charleston for appropriate disciplinary proceedings. For students that have questions as to what plagiarism exactly entails (for those of you that like to push the envelope) please feel free to look up the definitions at [http://www.plagiarism.org/](http://www.plagiarism.org/).

### Fall 2013 Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Subject/Event</th>
<th>Assignment(s) Due</th>
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<tbody>
<tr>
<td>August</td>
<td></td>
<td>Review Syllabus (In Class)</td>
</tr>
<tr>
<td>Tuesday</td>
<td>Introduction</td>
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<td>20</td>
<td>Discuss “What is Rural Planning”</td>
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</tr>
<tr>
<td>Thursday</td>
<td>Introduction</td>
<td>Read: Chapter 1 by Thornbeck, and Introduction and</td>
</tr>
<tr>
<td>22</td>
<td></td>
<td>Chapter 1 by Thomas, Lowe, Fulkerson, and Smith</td>
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<tr>
<td></td>
<td></td>
<td>Hand In: Daily Notes</td>
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<tr>
<td>Tuesday</td>
<td>The History of Planning</td>
<td>Read: Chapters 3 &amp; 4 by Levy, <em>Selling Which South</em></td>
</tr>
<tr>
<td>27</td>
<td></td>
<td>Hand In: Daily Notes</td>
</tr>
</tbody>
</table>
| Thursday   | The Legal Basis of Planning & Planning and Politics | Read: Chapters 5-6 by Levy *SOUTH CAROLINA PLANNING ENABLING ACT OF 1994*
| 29         |                                      | County of Charleston Planning Department hydro://www.charlestoncounty.org/departments/Planning/index.htm
<p>|            |                                      | Hand In: Daily Notes                                   |
| September  | Comprehensive Planning and Land-Use | Read: Chapters 8-9 by Levy, <em>Purchasing South Carolina Farmers’ Development Rights</em> |
| Tuesday    |                                      | Hand In: Daily Notes                                   |
| 3          | Rosh Hashanah                        | No Class                                               |
| Thursday   |                                      |                                                       |
| 5          |                                      |                                                       |
| Tuesday    | Rural Development and Growth Management | Read: Development by Design, <em>This is Smart Growth, Rural Green Building, Hanalei Bridge: A Catalyst for Rural Preservation</em> |
| 10         |                                      | Hand In: Daily Notes                                   |</p>
<table>
<thead>
<tr>
<th>Thursday 12</th>
<th>Professor at Conference</th>
<th>No Class</th>
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</table>
| Tuesday 17 | Farmland and Natural Area Planning | **Read**: Successful Whole Farm Planning, Promoting Agriculture in Your Community, Is a Rural Stewardship Plan right for me?, Emerging Principles for Using Information Education in Wilderness Management  
**Hand In**: Daily Notes |
| Thursday 19 *** | Midterm Paper & Presentations | **Hand In**: History of a Rural Region Research Midterm Paper Presentations |
| Tuesday 24 | Presentation cont. | Presentations  
**Read**: The South and the Movement Against Chain Stores  
**Hand In**: Daily Notes |
| Thursday 26 *** | Presentation cont. | Presentations  
**Read**: The Aestheticization of the Politics of Landscape Preservation  
**Hand In**: Daily Notes |
| **October** Tuesday 1 | Rural Heritage | **Read**: Chapter 2 by Thornbeck, Secretary Standards for Preservation Planning, Chapter 3.4 Cultural Resources Element from Charleston County Plan  
**Hand In**: Daily Notes |
| Thursday 3 | Rural Character and Design | **Read**: Chapters 3 and 6 by Thornbeck, Rural Area Design Guide, Rural by Design  
**Hand In**: Daily Notes |
| Tuesday 8 | Regional Vision, National and State Planning | **Read**: Chapter 4 by Thornbeck, Chapter 17 by Levy, Rhode Island State Land Use Policies and Plan, American Planning Association,  
http://www.planning.org/divisions/smalltown/index.htm  
**Hand In**: Daily Notes |
| Thursday 10 | Research Foundation and Environmental Planning | **Read**: Chapter 5 by Thornbeck, Environmental Planning for Small Communities  
**Hand In**: Daily Notes |
| Tuesday 15 | **Fall Break** | No Class |
| Thursday 17 | Food Inc. Movie | **Read**: Preserving Rural Character  
**Hand In**: Daily Notes |
| Tuesday 22 | Rural Transportation Planning | **Read**: Planning for Transportation in Rural Areas; SCDOT  
http://www.scdot.org/doing/publications_Multimodal.aspx  
**Hand In**: Daily Notes |
| Thursday 24 | Rural Public Health | **Read**: Bridging the Health Divide; Public Health Preparedness  
http://www.scdhec.gov/administration/ophp/  
**Hand In**: Daily Notes |
| Tuesday 29 | Interdisciplinary Connections Urban/Rural Boundaries | **Read**: Chapter 7 by Thornbeck, Finding Exurbia  
**Hand In**: Daily Notes |
<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
<th>Reading/Hand In</th>
</tr>
</thead>
</table>
| November  5 | Rural Futures                         | Read: Chapter 8 and Epilogue by Thornbeck, Vermont's Changing Rural Landscape  
Hand In: Daily Notes |
| Thursday  7 | Rural Theory and Planning Theory      | Read: Chapter 19 by Levy, and Part I by Thomas, Lowe, Fulkerson, and Smith  
Hand In: Daily Notes |
| Thursday  7 | Rural Theory                          | Read: Part II by Thomas, Lowe, Fulkerson, and Smith  
Hand In: Daily Notes |
| Tuesday  12 | Rural Theory                          | Read: Part III and Chapter 8 by Thomas, Lowe, Fulkerson, and Smith  
Hand In: Daily Notes |
| Thursday 14 | Papers and Presentations due          | Hand-in: Planning-related Research Paper by email & Presentation in-class |
| Tuesday 19 | Presentations continued               | Read: A Short Introduction to Micro-Regional Planning  
Hand In: Daily Notes |
| Thursday 21| Presentations continued               | Read: Environmental Justice  
Hand In: Daily Notes |
| Tuesday 26 | Review Day                            | Review Materials from the Semester – All is fair game!  
Hand In: Planning Commission Meeting Assignment Due |
| Thursday 28| Thanksgiving Break                    | No Class                                           |
| December  3 | Study Day                             | No Class                                           |
| Thursday  5 | Study Day                             | No Class                                           |
| Tuesday 10 | Final Exam, 8:00-11:00am              | Final Exam – Bring Blue Book                       |
History and background of zoning and land use controls [1-10]
   b. Purpose and function of police powers
   c. Goal of zoning laws to maintain character of residential neighborhoods while allowing commercial and mixed use growth to develop

Enabling legislation for counties and municipalities: [332]; Title 6-29, SC Laws
   a. Local government regulations, controlled by underlying state law [5-8, 71-72]
   b. 1994 S.C. Comprehensive Planning Enabling Act

What is regulated?
   a. Subdivision of land/ exactions [107-129]
   b. Zoning of uses:
      1. Classifications [67-71]
      2. Specific building requirements
      3. 1st amendment: Signs, Adult Uses [162-172]
      4. Historic districts; landmark protection [299-318]
      5. Tree and buffer protection [292-294]
      6. Freshwater/saltwater wetlands
         a. DHEC (OCRM) - Beachfront Management
         b. Corps of Engineers
         c. Local environmental protection [267-292]
         d. Brownfields [251-253]
      7. Miscellaneous use restrictions

The development process
   a. Master Plan / Comprehensive Plan [53-61]
   b. Administrative permits
   c. Conditional Use Permits [86-88]
   d. Variances [80-86]
   e. Zoning changes/amendments [88-92]
   f. Smart Growth: Clustering, Planned developments, floating zones [214-233]
   g. Neighborhood input
   h. Zoning boards and Local government councils

Appealing Commission and Council decisions
   a. Planning Board decisions only appealable for subdivision decisions
   b. Board of Zoning Appeals: mediation and appeals to Circuit Courts
   c. Judicial Standard of Review [331-341]
VI. Non-conforming lots and non-conforming uses [93-99]
   a. Vested rights
   b. Existence prior to zoning laws
   c. Generally no expansion of non-conforming uses
   d. Amortization of certain non-conforming uses

VII. Eminent domain v. Police power [149-179]
   a. Public Use Doctrine [237-241]
   b. Dedication of rights-of-way/easements/exactions
   c. Moratorium [200-203]
   d. Condemnations [236-242]
   e. Fifth Amendment issues: Regulatory Takings/Due process [130-161]

VIII. Contract/Conditional zoning [92-93; Inverness v. Bedford/Reinbolt]

IX. Private covenants and conservation easements [34-37]
   a. Supersede zoning if they are more restrictive
   b. Disputes/ violations

X. Violations and enforcement of land use regulations [102-106]
   a. Warnings
   b. Fines
   c. Options to rectify by removal, cease and desist, or requesting variances/ zoning change
   d. Judicial remedies

SOURCES:
Title 6-29 S.C. Code of Laws [available online] and Land Use Articles

GENERAL EDUCATION SOCIAL SCIENCE LEARNING OUTCOME: This class counts toward general education. This means that students must demonstrate mastery of the following general education student learning outcome for the social sciences:

Students can apply social science concepts, models or theories to explain human behavior, social interactions or social institutions.

This outcome will be assessed using a question in your mid-term exam, and it will count toward 5% of your overall grade.
- **Class participation:** 1) Briefing a case (30%), 2) On a weekly basis, finding and discussing articles related to land use controls, locally, or from your hometown (25%); 3) Reading and written assignments during the semester (15%).
- **Mid-term exam (25%)**
  - One question in this exam will be used to assess the social science student learning outcome. It will be worth 5% of your overall grade in the course.
- **Final project or exam (class to decide (25%).**
- We will attend a Board of Zoning Appeals meeting that will involve local zoning laws as they are applied in actual development situations.