

# BLHS 228 – 140 Financial Management

**Dates**: Summer 2021 (May 24, 2021 - Aug 15, 2021)

**Location**: This course takes place online. Georgetown University School of Continuing Studies (SCS) uses Canvas as its Learning Management System. This course will be taught entirely through the Canvas platform. To learn more about Canvas, please go through the [Canvas Guide for Students](http://guides.instructure.com/m/4212).

**Faculty**: Professor Craig O’Connor

**Contact Information**: oconnoc1@georgetown.edu

**Virtual Office Hours**: available upon request

## COURSE DESCRIPTION

This course introduces the theory and practice of corporate financial management and the application of financial management techniques to business decision-making. Topics include financial statement analysis, financial ratio analysis, the time value of money, risk and return, capital budgeting, cost of capital, sources and uses of financing, and international markets.

Students will learn about data security standards, the importance of data anonymization and methods to identify and prevent insider threats.

## COURSE LEARNING OBJECTIVES

By the end of this course, student will be able to

1. Explain the role of finance in the economy and the business environment.
2. Evaluate investments, securities, and markets.
3. Analyze and review how to read a financial report and conduct financial analysis using ratios.
4. Demonstrate how data and data visualization can be used to reduce uncertainty and risk related to decisions and decision-making.
5. Create effective static and interactive data visualizations or narratives that employ analytics and visualization software and strategies for various audiences.
6. Develop a working knowledge of international trade and project finance.
7. Find and access publicly available datasets and conduct ad hoc analysis (summarize, estimate, predict data, use pivot tables).
8. Visualize data using multiple types of displays, including tables, dashboards, graphs, maps, and tree-skill, for proper applications in various situations.

## REQUIRED COURSE MATERIALS

### Required Textbooks

* Melicher, R. W., & Norton, E. A. (2017). *Introduction to finance: Markets, investments, and financial administrators* (16th ed.). Wiley.

### Online Resources

All other required resources for this course are posted online and students don’t need to purchase them.

## COURSE REQUIREMENTS

### Overview of Assignments

This is an online course, and this course is highly interactive. All course readings, videos, notes, and other materials are posted online. You are required to read course material, and participate/post class discussions on a timely regular basis, according to posted instructions. Regular completion of reading assignments and participation in online discussions are essential to the course. In order to successfully complete this course, you must demonstrate your understanding of the material by:

* Reading the required text chapters and/or assigned articles
* Watching the video lectures
* Participating actively in the online asynchronous discussions
* Completing the chapter review questions
* Completing the special project
* Writing two papers

Here is an overview of all of the assignments in the course.

**Online Discussions:** Students are required to write and post in the discussion forums regularly throughout the term. Each discusses the main topic of the module, synthesizes the readings (300 words), and includes two replies to other students' posts (100 words). The discussion activities provide students with an opportunity to deeply reflect on the readings assigned to each module and relate them to real-world situations. All of the posts on the discussion board are required to be thoughtful, reflective, and concise.

**Chapter Review Questions:** The chapter review questions are keyed to specific learning objectives and help you review chapter materials. Your answer to each question should be clear, concise, and focused.

**Special Project:** The special project requires you to use a company’s financial statements to generate the following ratios, Profitability Ratios, Liquidity Ratios, Financial Leverage Ratios, and Asset Management Ratios. You will use graphs and pie charts to illustrate the trends shown by the ratios. You will also be required to submit a short presentation to explain the major components and the importance of the company’s financial statements.

**Paper 1:** You will write a paper on the impact of the globalization of financial markets on nations and companies. The paper should be 5-6 pages long, typed, and double-spaced.

**Paper 2**: In this paper, you will write about a subject of your choice related to finance. The paper should be 5-6 pages long, typed, and double-spaced.

### Zoom Meeting

There is one required synchronous class meetings in the course. It will be recorded so you can watch the recordings if you are not available to attend the meeting. The instructor will work with the class to determine a time that is convenient for most class members.

You are required to use Zoom to attend the synchronous class meeting. The specific date and time for the Zoom session will be posted in the Canvas course site. The Zoom session will be scheduled for 45 minutes. This allows for 15-20 minutes of discussion by the instructor and up to 30 minutes of open discussion with the students. The synchronous meeting is a great opportunity for you to get to know your classmates, ask questions and hear about your instructor's perspectives.

* Class Zoom Meeting- Course Orientation
	+ faculty and student introductions
	+ review of the course syllabus
	+ overview of the assignments
	+ general expectations for the discussion postings
	+ general expectations for the papers
	+ open discussion

Please familiarize yourself with this tool.

[Zoom](https://uis.georgetown.edu/zoom/) is an effective tool for both real-time conferencing, as well as recorded/playback video sessions. Read the information available below that describes how to use the Zoom tool.

* [System Requirements for Installing Zoom](https://uis.georgetown.edu/zoom/install/requirements/)
* [Signing into Zoom](https://uis.georgetown.edu/zoom/signin/)
* [Hosting a Zoom Meeting](https://uis.georgetown.edu/zoom/host/)
* [Joining a Zoom Meeting](https://uis.georgetown.edu/zoom/join/)

### Technical Requirements

As an online student your "classroom" experience will be very different than a traditional student. As part of your online experience, you can expect to:

1. Communicate via email including sending attachments.
2. Navigate the internet using a Web browser.
3. Use office applications such as Microsoft Office or Google Docs to create documents..
4. Learn how to submit assignments in Canvas.
5. Communicate with peers using discussion boards and other platforms.
6. Upload and download saved files.
7. Have easy access to the Internet.
8. Navigate Canvas, including using the email component within Canvas.
9. Use a microphone to record audio through your computer.
10. Use an internal or external camera to record video through your computer.

In this course we will use TurnItIn and Zoom.

* TurnItIn is a writing assessment tool that is used to detect plagiarism and allows teachers to provide assignment feedback to students. [Instructions for TurnItIn are available here](https://drive.google.com/file/d/1fX0-o-F1xnV2t-8eb8Rp4bIRc5nstszQ/view?usp=sharing).
* Zoom enables users to conduct synchronous (“real-time”) conferences, presentations, lectures, meetings, office hours and group chats via audio, video, text chat and content sharing. [Instructions for Zoom are available here](https://drive.google.com/file/d/1f_sWZFt80vaiF0mEEvQ4aUHvagZHuQsf/view?usp=sharing).

### Computer Requirements

Students need to have sufficient technology and Internet access to complete this course. The requirements are listed by [Canvas in the Instructure Guides](https://guides.instructure.com/m/4214/l/82542-what-are-the-basic-computer-specifications-for-canvas).

### Audio and Video Capability

* You will need an internal or external microphone. Most computers now come with them built in.
* You will need an internal or external camera. Most computers now come with them built in.

## COURSE EXPECTATIONS

This course is conducted entirely online, which means students do not have to be on campus to complete any portion of it. Students will participate in the course using Georgetown University's online learning management system called Canvas.

### Student Expectations

This course consists of 15 weeks. You are expected to do the readings, watch the lecture videos, Complete Required Posts, Replies and to engage with the course material in depth according to posted deadlines. Your responsibilities include completing all the assignments. Participation is essential to your success in this class. In order to get full credit for participation, you will have to complete your assigned discussions, replies, projects, and papers before the due dates.

### Time Expectations

Our online classes are designed to meet the same academic standards as our place-based (face-to-face) courses. You can think of each module equal to the same level of participation, commitment, and academic rigor as a face-to-face class.

You will need approximately 8.5 hours per week on the work for each weekly online module. Past students who have succeeded report a single largest factor has been consistent attention several times a week to readings, postings and responses on the website.

## ACADEMIC INTEGRITY

All students are expected to maintain the highest standards of academic and personal integrity in pursuit of their education at Georgetown. We assume you have read the honor code material located online at [honorcouncil.georgetown.edu](https://honorcouncil.georgetown.edu/), and in particular have read the following documents: Honor Council Pamphlet, What is Plagiarism, Sanctioning Guidelines, and Expedited Sanctioning Process. Papers in this course will all be submitted to turnitin.com for checking. Academic dishonesty in any form is a serious offense, and students found in violation are subject to academic penalties that include, but are not limited to, failure of the course, termination from the program, and revocation of degrees already conferred. All students are expected to follow Georgetown’s honor code unconditionally.

The Honor Pledge:

*In pursuit of the high ideals and rigorous standards of academic life I commit myself to respect and to uphold the Georgetown University honor system:*

*To be honest in every academic endeavor, and*

*To conduct myself honorably, as a responsible member of the Georgetown community as we live and work together.*

### Plagiarism

Stealing someone else’s work is a terminal offense in the workplace, and it will wreck your career in academia, too. Students are expected to work with integrity and honesty in all their assignments. The Georgetown University Honor System defines plagiarism as "the act of passing off as one's own the ideas or writings of another.” More guidance is available through the [Gervase Programs](http://honorcouncil.georgetown.edu/system). If you have any doubts about plagiarism, paraphrasing, and the need to credit, check out [Plagiarism.org](http://www.plagiarism.org/).

### Resubmission

The Georgetown Honor Code likewise forbid RESUBMISSION of work from another COURSE.

## COURSE ACTIVITIES AND ASSIGNMENTS

All assignments are due by the assigned due dates on Canvas. **DO NOT SEND YOUR PAPERS TO OTHER PERSONAL OR PROFESSIONAL EMAIL ADDRESSES**. Follow-ups and class participation are contingent on the timely submission of your initial responses.

### Late Submission Policy:

Late submissions without excuse are penalized according to posted criteria in the syllabus.

As stated in the [Student Handbook](http://static.scs.georgetown.edu/upload/kb_file/mps.studenthandbook.15-16.pdf), you must notify me and obtain my approval if you are unable to complete any assignment by the published submission deadline. I will gladly consider granting extensions for assignments as long as the request is made at least 24 hours before the due date/time. The request must include the date and time when you intend to submit the assignment. If you fail to give both a date and a time, however, the request will not be honored. However, no late submissions or extensions are available for the last week of class or for any missed lectures.

### Writing Resources

The Writing Lab provides assists SCS students during the writing process and also provides the essential writing skills necessary to succeed in school.  The Writing Lab holds workshops every semester on a variety of topics, and also offers one-on-one sessions with an experienced writing tutor either online or onsite.

To meet the diverse needs of our SCS student population, workshops and tutoring sessions are designed to assist both native and non-native speakers in their writing are available.  To learn more about the services available to you, go to [SCSWritinglab.georgetown.domains.](http://scswritinglab.georgetown.domains/)

Schedule an [Appointment with SCS Writing Center](http://scswritinglab.georgetown.domains/tutoring_/tutoring/):

### Citation Style

Students must use style guide for all coursework. The APA Style (APA Publication Manual 6th Edition) is used widely in SCS courses. The SCS library APA Citation video will help guide your citation formatting. You can find the video on the [School of Continuing Studies Library: APA 6th Edition web page](https://guides.library.georgetown.edu/scsgeneral/apa).

In addition, the following links provide guidance for APA style and citations as well:

* [American Psychological Association](http://apastyle.org/)
* [Purdue Online Writing Lab](http://owl.english.purdue.edu/owl/section/2/10/)

## GRADING

Each assignment will be graded on a 100-point scale. The course grading will be based on the following areas:

|  |  |
| --- | --- |
| **Assignments** | **Percent** |
| Chapter Review Questions | 50%  |
| Special Project | 10% |
| Paper 1 | 10% |
| Paper 2 | 10% |
| Online Discussions | 20% |
| **Total** | **100%** |

### Letter Grading Descriptions

The letter grade in this course will be determined by the following grading scale:

* A: 93% to 100%
* A-: 90% to 92%
* B+: 87% to 89%
* B: 83% to 86%
* B-: 80% to 82%
* C+: 77% to 79%
* C: 73% to 76%
* C-: 70% to 72%
* D+: 67% to 69%
* D: 63% to 66%
* F: 62% and below

## ACCOMMODATIONS

Under the Americans with Disabilities Act (ADA) and the Rehabilitation Act of 1973, individuals with disabilities have the right to specific accommodations that do not fundamentally alter the nature of the course. Some accommodations might include note takers, books on tape, extended time on assignments, and interpreter services among others.

Students are responsible for communicating their needs to the Academic Resource Center, the office that oversees disability support services, ((202) 687-8354; arc@georgetown.edu; [Disability Support Services website](http://academicsupport.georgetown.edu/disability)) before the start of classes to allow time to review the documentation and make recommendations for appropriate accommodations. The University is not responsible for making special accommodations for students who have not declared their disabilities and have not requested an accommodation in a timely manner. Also, the University need not modify course or degree requirements considered to be an essential requirement of the program of instruction. For the most current and up-to-date policy information, please refer to the [Georgetown University Academic Resource Center website](https://academicsupport.georgetown.edu/). Students are highly encouraged to discuss the documentation and accommodation process with an Academic Resource Center administrator.

## STUDENT SUPPORT SERVICES

### Support Services

SCS offers a variety of support systems for students that can be accessed online, at the School of Continuing Studies downtown location, and on the main Georgetown campus:

**Academic Resource Center**

(202) 687-8354 | arc@georgetown.edu

[Visit the Academic Resource Center Website.](http://academicsupport.georgetown.edu/)

**Counseling and Psychiatric Services**

(202) 687-6985

[Visit the Counseling and Mental Health Website.](http://caps.georgetown.edu/)

**Institutional Diversity, Equity & Affirmative Action (IDEAA)**

(202) 687-4798

[Visit the Institutional Diversity, Equity & Affirmative Action Website.](https://ideaa.georgetown.edu/)

### Georgetown Library

Students enrolled in online School of Continuing Studies SCS coursework have access to the University Library System’s eResources, including 500+ research databases, 1.5+ million ebooks, and thousands of periodicals and other multimedia files (films, webinars, music, and images). Students can access these resources through the [Library’s Homepage](http://library.georgetown.edu/scs) by using their University username (NetID) and password (this is the same login information used to access email, BlackBoard, etc.). The Library does not mail physical items to students.

SCS students may make an appointment with a librarian to discuss a research topic, develop a search strategy, or examine resources for projects and papers. Librarians offer an overview of and in-depth assistance with important resources for senior or master's theses, dissertations, papers and other types of research. Appointments are conducted using Google Hangout (video-conferencing function) through the Georgetown Gmail System or by telephone. This service is available to currently enrolled students who need assistance with Georgetown-assigned projects and papers. Please review the [Services & Resources Guide for Online Students](https://scs.georgetown.edu/resources-online-students/) for additional information.

### Research Guide

The Project Management program has an extensive online [Library Research Guide](http://guides.library.georgetown.edu/researchcourseguides) designed for the subject and research specifications of our program. This Guide will give you direct access to the library resources central to your course research work.

### Learning Resources

SCS offers a host of [learning resources](http://scs.georgetown.edu/academic-affairs/resources/) to its students. Two that you might find particularly helpful in this course are the [Writing Center](http://writingcenter.georgetown.edu/) and [Refworks](http://guides.library.georgetown.edu/refworks).

* The [Writing Center](http://writingcenter.georgetown.edu/) offers professional writing support through its online peer tutoring service.
* [Refworks](http://guides.library.georgetown.edu/refworks) is an online research management tool that aids in organizing, storing, and presenting citation sources for papers and projects.

### Technical Support

#### Canvas

Click on the Help link (on the bottom-left corner in Canvas) to reach Canvas Support, including the [Canvas Student Guide](http://guides.instructure.com/m/4212) and 24 hour Canvas Support Hotline at 855-338-2770.

#### Turnitin

TurnItIn is a writing assessment tool that is used to detect plagiarism and allows teachers to provide assignment feedback to students. [Technical support for TurnItIn is available](http://turnitin.com/en_us/support).

#### Zoom

Zoom enables users to conduct synchronous (“real-time”) conferences, presentations, lectures, meetings, office hours and group chats via audio, video, text chat and content sharing. [Technical support for Zoom is available.](https://help.georgetown.edu/sims/helpcenter/common/layout/SelfhelpArticleView.seam?inst_name=georgetown_university&article_id=8580-8283-5647)

## COMMUNICATIONS GUIDELINES

### Netiquette Guidelines

To promote the highest degree of education possible, we ask each student to respect the opinions and thoughts of other students and be courteous in the way that you choose to express yourself. The topics in this course can be controversial and promote debate. Students should be respectful and considerate of all opinions.

In order for us to have meaningful discussions, we must learn to genuinely try to understand what others are saying and be open-minded about others’ opinions. If you want to persuade someone to see things differently, it is much more effective to do so in a polite, non-threatening way rather than to do so antagonistically. Everyone has insights to offer based on his/her experiences, and we can all learn from each other. Civility is essential.

### Statement of Student Conduct, Civility, and Engagement

The School of Continuing Studies offers students the opportunity to engage with faculty, staff, and peers in ways that foster intellectual growth and development in their chosen field of study. It is important to recognize that each member of our community brings his or her own values, thoughts, perspectives, and experiences into each interaction. We expect students to behave in a manner that is civil and respectful of others, and appreciate the learning opportunities that come from engaging pluralistic perspectives in a dynamic educational environment.

Engagement within the SCS Georgetown community takes places in on-campus meeting spaces and classrooms, and extends to online learning platforms and forums. Students should be particularly mindful that participation in class discussions, group assignments, emails, blogs, and social media reflect upon them personally, academically, and professionally. All viewpoints, editorials, and opinions expressed by students represent those students exclusively – and not the students’ instructors, classmates, academic program, School, or University – even in cases when students are using Georgetown-affiliated systems like email, blogs, and online portfolios. The expectations for respect and civility are consistent for on-campus classes and spaces, as well as cyber, virtual, and online environments. Thus, civility and cybercivility are expected of all students, in all campus spaces.

SCS students are expected to adhere to the SCS guidelines for student conduct and the University Code of Student Conduct. In the event that a student's behavior is perceived to fall outside the stated SCS guidelines or may be a violation of the Code of Student Conduct, the matter may be referred to the Office of Student Conduct for further review and possible sanctioning. Such instances can include but are not limited to: disruption of official university functions (including teaching, research, administration), failure to comply with a directive issued by a University official, harassment and bullying, and incivility. For questions regarding the SCS student conduct expectations please review the policy in-full found in the [Bachelor of Arts in Liberal Studies Undergraduate Bulletin](https://bulletin.georgetown.edu/schools-programs/scs/academic-policies/). For questions about the Code of Student Conduct, please review the information provided by the [Office of Student Conduct](https://studentconduct.georgetown.edu/).

### Communication with Peers

#### Notifications

**Notifications will be posted on Canvas. Please check at least once per day.**

#### Ask Your Instructor Forum

In online courses, everyone will likely have many questions about things that relate to the course, such as clarification about assignments and course materials. Please post these in the Ask Your Instructor forum, which you can access by clicking Discussions in the course navigation menu. This is an open forum, and you are encouraged to give answers and help each other.

#### Turnaround and Feedback

Communication with the Instructor only occurs through your official Georgetown email; response occurs within 24 hours during the week and two days on weekends. Assessment submission feedback occurs after all students have completed assignments that involve multiple peer responses.

#### Extreme weather, Emergencies, and Instructional Continuity

Instructional Continuity is a policy that allows faculty and students to maintain learning activities and academic work during disruptions such as inclement weather or university closures. Although the University may close in some circumstances, all online courses and activities will continue without disruption.

## COPYRIGHT

The materials used in Georgetown University courses ("Course Materials") generally represent the intellectual property of course instructors which may not be disseminated or reproduced in any form for public distribution (e.g., sale, exchange, etc.) without the written permission of the course instructor. Course Materials include all written or electronic documents and materials, including syllabi, current and past examination questions/answers, and presentations such as lectures, videos, PowerPoints, etc., provided by a course instructor. Course Materials may only be used by students enrolled in the course for academic (course-related) purposes.

Published course readings (book chapters, articles, reports, etc.) available in Canvas are copyrighted material. These works are made available to students through licensed databases or fair use. They are protected by copyright law, and may not be further disseminated or reproduced in any form for distribution (e.g., uploading to websites, sale, exchange, etc.) without permission of the copyright owner.

More information about intellectual property and copyright can be found here: <https://www.library.georgetown.edu/copyright>

More information about computer acceptable use policy and intellectual property can be found here: <https://security.georgetown.edu/it-policies-procedures/computer-systems-aup>

## SEXUAL MISCONDUCT

Georgetown University and its faculty are committed to supporting survivors and those impacted by sexual misconduct, which includes sexual assault, sexual harassment, relationship violence, and stalking. Georgetown requires faculty members, unless otherwise designated as confidential, to report all disclosures of sexual misconduct to the University Title IX Coordinator or a Deputy Title IX Coordinator. If you disclose an incident of sexual misconduct to a professor in or outside of the classroom (with the exception of disclosures in papers), that faculty member must report the incident to the Title IX Coordinator, or Deputy Title IX Coordinator. The coordinator, will, in turn, reach out to the student to provide support, resources, and the option to meet. [Please note that the student is not required to meet with the Title IX coordinator.]. More information about reporting options and resources can be found on the [Sexual Misconduct Website](https://sexualassault.georgetown.edu/resourcecenter).

If you would prefer to speak to someone confidentially, Georgetown has a number of fully confidential professional resources that can provide support and assistance. These resources include:

1. Health Education Services for Sexual Assault Response and Prevention: confidential email sarp@georgetown.edu
2. Counseling and Psychiatric Services (CAPS): 202. 687.6985 or after hours, call 202. 444.7243 and ask for the on-call CAPS clinician.

Thank you for supporting our students impacted by sexual violence. If interested, other helpful more general resources are included below:

* [Georgetown Self-Care Resource Guide](https://studenthealth.georgetown.edu/self-care)
* [Georgetown Wellness Wheel](https://studenthealth.georgetown.edu/Hoya-Wellness-wheel)
* [Georgetown Guide to Recognizing Students in Distress](https://studenthealth.georgetown.edu/resourceguide)

## PREGNANCY ADJUSTMENTS AND ACCOMMODATION

Georgetown University is committed to creating an accessible and inclusive environment for pregnant and parenting students.  Students may request adjustments based on general pregnancy needs or accommodations based on a pregnancy-related complication.  Specific adjustments will be handled on a case by case basis and will depend on medical need and academic requirements.

Students seeking a pregnancy adjustment or accommodation should follow the process laid out at the [Pregnancy Adjustments and Accommodations for Students webpage](https://titleix.georgetown.edu/title-ix-pregnancy/student-pregnancy/).

## COURSE SCHEDULE

\*Course schedule will be followed but is not a contract.

All readings are posted on Canvas

|  |  |
| --- | --- |
| **Weeks** | **Modules and Assignments**  |
| 1 & 2 | **Course Orientation*** Participate in the Introduction discussion
* Review the course syllabus

**Module 1: Financial Environment*** Read Chapters 1-3 and other assigned materials
* Watch the video lecture, Finance, The Economy, and Personal Impact
* Complete the review questions
* Participate in the discussion, The Importance of Finance
* Participate in the discussion, The Use of Data
 |
| 3&4 | **Module 2: Money and Monetary System*** Read Chapters 4-5 and other assigned materials
* Watch the video lecture, Money, Money Markets, and the Federal Reserve
* Complete the review questions
* Participate in the discussion, Interest Rates
* Participate in the discussion, The Role of the Federal Reserve
 |
| 5, 6, 7, 8, & 9 | **Module 3: Investments, Securities, and Markets*** Read Chapters 7-11 and other assigned materials
* Watch the video lecture, Investments, Markets, and Animal Spirits
* Complete the review questions
* Participate in the discussion, The Influence of Interest Rates
* Participate in the discussion, The Stock Market
* Participate in the discussion, The Impact of Human Psychology
* Participate in the discussion, Data Security
* Participate in the discussion, Data Protection
 |
| 10&11 | **Module 4: Corporate Financial Analysis*** Read Chapters 14&17 and other assigned materials
* Watch the video lecture, Value
* Complete the review questions
* Participate in the discussion, Financial Statements
* Participate in the discussion, Financial Ratios
* Complete the special project: Financial Statement Analysis
 |
| 12&13 | **Module 5: Global Markets and Local Impact*** Review the PowerPoint presentation and the assigned materials
* Watch the video lecture, Globalization of Financial Markets
* Participate in the discussion, The Globalization of the Financial Markets
* Participate in the discussion, Income Inequality
* Complete the paper: Globalization of Financial Markets
 |
| 14&15 | **Module 6: International Finance and Trade*** Review the PowerPoint presentations
* Watch the video lecture, International Trade and Project Finance
* Participate in the discussion, The Importance of Trade and Project Finance
* Participate in the discussion, Methods of International Trade Finance
* Complete the paper: Financing Plan
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