

FACULTY SENATE MINUTES

March 28, 2022

The Pittsburg State University Faculty Senate met at 3:00 p.m. on Monday, March 28th, 2022, with Shawnee Hendershot, President, presiding.

Past Minutes

Minutes from the February 28th, 2022 meeting were approved.

Announcements

Provost and Vice President of Academic Affairs – Dr. Howard Smith

It was reported that PSU's proposal for a BBA in Business Studies will be on the KBOR April agenda. The National Institute for Student Success (NISS) is wrapping up their report for KBOR and the participating schools. Four areas have been highlighted for PSU by the NISS: 1) financial aid specialization especially for Pell recipients, 2) centralized advising with increased coordination, 3) transition services for changing majors, and 4) improvements in data availability. In addition, KBOR is working on a space utilization update to assist in improving efficiencies. Lastly, the implementation for the new financial aid system has begun.

PSU/KNEA –Khamis Siam, President

It was shared that officer elections would be happening soon. In addition, the KNEA bargaining unit recently participated in bargaining training. Faculty were encouraged to check with the CTLT regarding submission of completion certificates for the PD training.

Student Senate – Kaedra Brenner, Representative

It was reported that the Big Event is scheduled for April 2nd. The Student Government Association just concluded elections for next year. Student Government Association participated in Higher Education Day in Topeka and discussed the following: mental health and higher education funding, and recruitment and retention.

Unclassified Professional Senate – Mary Jo Meier, President

It was announced that the committee met on March 2nd with Provost Smith as the guest speaker. During the Apple Day ceremony, Becky Kraus and Barb Barto were announced as the VOYA award recipients. The committee is currently working on elections; the ballot is planned to go out April 4th. In addition, the survey from the Docking Institution should be released on April 6th. The next meeting is scheduled for April 6th with Shawn Naccarato as guest speaker.

University Support Staff – Terry Pierce, President

No report.

Faculty Senate President – Shawnee Hendershot, President

It was shared that increasing the AP cut score for English from a 3 to a 4 would be voted on by COCAO (the Regents Chief Academic Officers) at their next meeting. The initial concern raised was that students who receive credit for English Composition based on a score of a 3 have not demonstrated a level of learning necessary to be successful in higher level English courses. The data reviewed by PSU showed the contrary. In addition, Freedom of Expression statements will be presented at the April KBOR meeting. The KBOR rpk project is underway and will focus on program demand, duplication and efficiency across the system. It was stressed by the Regents that this project is meant to be a flashlight and not a hammer and they understand that each campus has their own culture. (PSU's previous rpk report can be found on Canvas under Strategic Visioning. Faculty may contact the CTLT if they need the information added to their Canvas.) Lastly, Dr. Scott will be attending the April Faculty Senate meeting.

Committee Reports

Academic Affairs – Mike Carper, Chair

No report.

Undergraduate Curriculum – Mary Jo Goedeke, Chair

All submissions up for review were passed and recommended for approval by Faculty Senate. (See agenda for details on submissions.)

All curriculum items recommended by the Undergraduate Curriculum Committee were approved.

Library Services/Learning Resources – Chase Dearing, Chair

No report.

Online and Distance Learning – Alex Binder, Chair

The committee was asked by the Student Faculty committee to review the Inclement Weather Policy that was approved at the March Student Faculty committee meeting. (See agenda under Student Faculty Committee Report for statement.) The committee recommended removing the second sentence addressing online coursework. The following statement will be included in the syllabus supplement moving forward: If the university declares an inclement weather day, it is at the instructor's discretion to determine any shifts to course work.

Academic Honors – Matthew Lunde, Chair

No report.

Honors College – Michelle Hudiburg, Chair

No report.

Writing Across the Curriculum – Alex Binder, Chair

The committee is reviewing the current policy that restricts enrollment in Writing to Learn courses prior to the Sophomore early enrollment day. They are currently gathering data and have discussed developing a survey.

Diversity and Multicultural Affairs – Eric Rojas, Chair

No report.

Student-Faculty – Tracy Stahl, Chair

The committee shared the four topics discussed at their March meeting. See agenda for details.

All University Committee – John Daley, Chair

No report.

Faculty Affairs – Jennifer Harris, Chair

The committee reported that as of March 8th, \$81,324.57 of travel funds remained. Faculty are encouraged to apply. In some cases, full-time, non-tenured faculty are eligible. The forms can be found on the Provost's website.

Constitution Committee – Norman Philipp, Chair

No report.

Pitt State Pathway Committee – Bob Kehle, Chair

No report.

Budget Committee – Chris Childers, Chair

No report.

Academic Honesty – Karen Johnson, Chair

No report.

Unfinished Business

None.

New Business

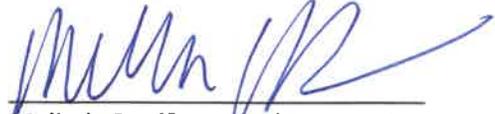
None.

Open Forum

It was reported that the KBOR General Education committee along with an Implementation subcommittee continues to meet to discuss a systemwide general education framework. Currently, it is believed that implementation would occur no earlier than Fall 2024.

The Irene Ransom Bradley School of Nursing has moved out of McPherson Hall to prepare for the new simulation hospital. The central office along with some courses is now located in the Axe Library.

Meeting Adjourned Meeting adjourned Monday, March 28th, 2022 at 3:37 p.m.



Melinda Roelfs, Recording Secretary

FACULTY SENATE MEMBERSHIP (2021-2022)

	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May
Shawnee Hendershot, (President)	X		X	X	X	X	X		
Shewmake, (Past President)	X	X	X	X	X	X			
Backs, (Technology & Workforce Development)	X	X	X	X	X	X	X		
Bailey, (At-Large)	X	X	X	X		X	X		
Binder, (Undergrad Kelce)	X	X	X	X	X	X	X		
Childers, (History, Philosophy & Social Science)	X	X	X		X	X			
Conrad, (Women's Studies)	X	X	X			X			
Cox, (At-Large)	X	X	X	X	X	X	X		
Cronister, (Family & Consumer Science)	X	X	X	X	X	X	X		
Daczewitz, (Teaching & Leadership)	X		X			X	X		
Daley, (History, Philosophy & Social Science)	X	X	X	X	X	X			
George, (Biology)	X	X	X	X	X	X	X		
Goedeke, (At-Large)	X		X	X	X	X			
Goris, (At-Large)	X	X	X			X	X		
Hardy, (Health, Human Performance & Rec)	X		X		X	X			
Hastings, (Music)	X			*	X				
Hermansson , (English & Modern Language)	X	X	X	X		X	X		
Heter, (Nursing)	X	X	X	X		X	X		
Hite, (At-Large)	X	X	X	X	X	X	X		
Johnson, (Nursing)	X	X	X	X	X	X	X		
Jones, (Automotive Technology)					X	X			
Jorgenson-Borchert, (At-Large)	X	X	X	X	X				
Labuda, (Library Services)	X	X			X	X	X		
Lewis, (Art)		X	X		X	X	X		
Livingston, (Communication)	X	X	X	X	X		X		
Maceli, (Undergrad Kelce)	X	X	X	X	X	X	X		
Moss, (At-Large)	X	X	X	X	X	X	X		
Neef, (Chemistry)	X		X						
Nicklaus, (School of Construction)	X	X	X	X	X	X	X		
Pearson, (Physics)				X		X	X		
Pretot, (Psychology & Counseling)		X	X	X	X	X			
Reid, (Graphics & Imaging)	X	X	X		X		X		
Rojas, (English & Modern Language)	X	X	X	X	X	X	X		
Runyan, (At-Large)	X		X	X	X		X		
Schiefelbein, (At-Large)	X	X		X	X	X	X		
Shaw, (Teaching & Leadership)			X		X	X	X		
Shay, (Military Science)									
Siam, (At-Large)	X	X	X				X		
Spielbusch, (Engineering Technology)	X	X	X		X	X	X		
Thuong, (Mathematics)	X	X	X	X	X	X	X		
Zepernick, (At-Large)			X		X	X	X		
USS Senate Representative	X		X		X				
UPS Senate Representative			X						
Student Government Representative			X	X	X				
Student									

*Substitutes: 12/6/21 Robert Kehle for Todd Hastings;



Pittsburg State University Faculty Senate Meeting

Date: Monday, March 28, 2022
Time: 3:00 p.m.
Location: Grubbs 107

Agenda

- I. **Call to order**
- II. **Guest Speakers**
- III. **Approval of February 28, 2022, minutes**
- IV. **Announcements**
 - A. **Provost and Vice President of Academic Affairs- Dr. Howard Smith**
 - B. **PSU/KNEA Remarks- Khamis Siam**
 - C. **Student Senate Remarks- Marci Heatherly**
 - D. **Unclassified Professional Senate Remarks- Mary Jo Meier**
 - E. **University Support Staff Remarks- Terry Pierce**
 - F. **Faculty Senate Report- Shawnee Hendershot**
- IV. **Committee Reports**
 - A. **Academic Affairs Committee - Chair: Mike Carper**
 - **Undergraduate Curriculum Subcommittee - Chair: Mary Jo Goedeke (Mike Carper reporting)**
 - **Library Services/Learning Resources Subcommittee - Chair: Chase Dearing**
 - **Online and Distance Learning Committee - Chair: Alex Binder**
 - **Academic Honors Subcommittee - Chair: Matthew Lunde**
 - **Honors College Subcommittee - Chair: Michelle Hudiburg**

- Writing Across the Curriculum Subcommittee - **Chair: Alex Binder**
- Diversity and Multicultural Affairs Subcommittee - **Chair: Eric Rojas**

B. Student-Faculty Committee - Chair: Tracy Stahl (Grant Moss reporting)

C. All-University Committee - Chair: John Daley

D. Faculty Affairs Committee - Chair: Jennifer Harris

E. Constitution Committee - Chair: Norman Philipp

F. Pitt State Pathway Committee - Chair: Bob Kehle

G. Budget Committee - Chair: Chris Childers

H. Academic Honesty Committee - Chair: Karen Johnson

V. Unfinished Business:

VI. New Business:

VI. Open Forum:

VIII. Adjournment

Next Faculty Senate Meeting: April 25, 3 p.m., OSC Ballroom C

Committee Reports

Academic Affairs – Chair: Mike Carper

Undergraduate Curriculum – Chair: Mary Jo Goedeke (Mike Carper reporting)

Library Services – Chair: Chase Dearing
No report.

Online and Distance Learning – Chair: Alex Binder
No report.

Academic Honors – Chair: Matthew Lunde

Honors College – Chair: Michelle Hudiburg

Writing Across the Curriculum – Chair: Alex Binder
Met to discuss the priority enrollment for Writing to Learn courses.

Diversity and Multicultural Affairs – Chair: Eric Rojas
No report.

Student-Faculty – Chair: Tracy Stahl (Grant Moss reporting)

Student Faculty Committee Report (3-1-22)

Members present: Cole Shewmake, Jason Clemensen, Tracy Stahl, Chauncey Pennington (via zoom), Jason Kegler, and Melinda Roelfs

Students representatives present: Emma Snider and Emma Hertig

Others invited and in attendance: Heather Eckstein (Student Success) and Marci Heatherly (SGA Campus Engagement Director)

1. Updates to the Academic Integrity Statement: Dr. Kegler drafted updates to the Academic Misconduct Statement and presented it to the committee for review. Everything has been changed to read as Academic Misconduct from Academic Dishonesty to stay consistent within the document and follows our current practices. It was recommended by Dr. Shewmake that we run the changes by Provost Smith. Motion to approve the Academic Misconduct Statement with recommended changes as discussed was made by Dr. Shewmake and seconded by Marcy Heatherly. Approved 7-0.

2. Inclement Weather Policy: The following policy was presented: If the university declares an inclement weather day, it is the instructor's discretion to determine any shifts to course work. Synchronous and Asynchronous online courses continue as scheduled regardless of inclement weather declarations. Motion to approve was made by Dr. Clemensen and seconded by Emma Hertig. Motion approved 7-0.

3. Changes to Early Enrollment Dates and Times: Heather Eckstein discussed the current SIS system and what would happen if major changes were made. It was determined that we need to limit the number of people who enroll at a certain time to keep the system from crashing. There is less traffic on the system on a Sunday. The time of 5 am was chosen due to students not being in class and giving each student a fair opportunity to enroll. The consensus of the committee was that we cannot make changes at this time with enrollment dates or times.

4. Old Business – Early enrollment for Student Employees: It was recommended by the committee of possibly adding the addition of athletes and SGA officers to the early enrollment period similar to the Honors College Policy. This item was tabled until next meeting to review who would be included and how the statement would read.

All-University – Chair: John Daley
No report.

Faculty Affairs – Chair: Jennifer Harris (Amy Hite reporting)

- Remaining balance \$81,324.57 as of March 8th, 2022.
- Please encourage everyone to apply and remind their respective departmental faculty to apply.

Constitution Committee – Chair: Norman Philipp
No report.

Pitt State Pathway – Chair: Bob Kehle

Budget Committee – Chair: Chris Childers
No report.

Academic Honesty – Chair: Karen Johnson
No report.

UGCC Meeting 03/09/2022

	Voting Members				Ex-Officio
	Carper	Goedeke	Gupta	Lewis	Johnson
					NOT PRESENT

Dept: FCS

Request for Revision to Curriculum

Update Nutrition and Wellness Emph. for new course number FCS 406

Request for New Course

Add 330 Financial Counseling

X	X	X	X	X	
X	X	X	X	X	

Pittsburg State University

Request for New Course

(Undergraduate Course Numbers through Course Number 699)

Department: FCS College: Education

Submission Date: _____

Contact Person: Goldie Prelogar Faculty member Chair

Is this new course proposal related to, and/or affect, any other department's/college's/unit's curricula or programs at Pittsburg State University?

 Yes No*Whether a "yes" or "no" response, please provide an explanation. Provide documentation of any discussions (e.g. copies of e-mails, memos, etc.) that have occurred.*Could potentially increase the enrollment in FIN 210. Business is aware and email communication is attached.**Proposed Course:**Course Number: 330Title of Course: Financial CounselingCredit Hours: 3Date first offered: 2022
(Semester/Year) Fall Spring Summer
(check all that apply)Prerequisite: FCS 230 or FIN 210

Course Description (as it will appear in the next catalog): This course provides an overview of the financial counseling process, techniques and strategies for leading clients through the challenges of debt reduction and achievement of their financial goals, and understanding the current resources, tools, and opportunities available in the financial counseling field. This course can help prepare students to pursue certification by the AFCPE® as an Accredited Financial Counselor. Prerequisite: FCS 230 Consumer Education and Personal Finance or FIN 210 Financial Planning.

Purpose/Justification for Proposed Course: The need for this course is three fold. Students in the Community and Family Services (CFS) emphasis area needing more upper division courses, especially ones that strengthen families and the community. Financial capability is still a high level need in the community and to employers. Secondly, this course will allow for an eventual Family Financial Planning minor and/or certificate. Finally, this course will allow PSU to become an approved AFCPE educational institution, this course and 230 will be all that is needed to meet the AFC educational requirements and can be done completely online - potentially increasing revenue.

Objectives/Student Learning Outcomes (as it will appear in the syllabus)

1. Summarize the complex relationship between values, attitudes, emotions, beliefs, self-esteem, and spending, saving, borrowing and investing.
2. Discuss how client culture and background affect all aspects of counseling.

These objectives are from the AFC Program Competencies:

3. Establish the counseling environment.
4. Gather client information.

5. Form a strategic counseling plan.
6. Assist a client in establishing goals and strategies to attain goals.
7. Educate a client about a cash flow statement, net worth statement, personal financial ratios, and spending plans.
8. Educate a client about financial services (checking, savings, CDs, online banking, being unbanked, etc).
9. Familiarize a client about basic tax management.
10. Discuss employment considerations with a client.
11. Educate a client about uses of credit, credit reports and scores, credit products and credit card usage.
12. Educate a client about student loans and fringe lending.
13. Educate a client on debt management including bankruptcy.
14. Educate a client on identity theft.
15. Assist the client on acquiring property (feasibility, options, and price negotiations).
16. Educate the client on renting a home, purchasing a home, and selling a home.
17. Explain consumer rights and responsibilities to a client.
18. Educate a client about financial risks (risk management, insurance, etc).
19. Educate a client about insurance products (property, health, life, & disability insurances).
20. Educate a client about investment fundamentals (risk tolerance, asset allocation, diversification, etc).
21. Educate a client about investment choices (stocks, bonds, mutual funds, real estate, alternatives and tools).
22. Educate a client about investor protection.
23. Educate a client about retirement planning (calculation tools, income sources, SS, defined benefit plans, employer sponsored plans, tax-sheltered accounts, spending in retirement).
24. Educate a client about estate planning (tools, process, how to select legal assistance, etc).

All objectives will be measured by a final comprehensive exam designed to simulate the AFC exam.

Assessment Strategies [e.g., exams, projects, university rubric, etc. (as it will appear in the syllabus)]
Assessments will be exam-based to mirror the certification exam. In addition to exams there will be several case studies of individuals and families as well as a final financial plan project.

If you wish to attach a syllabus, you may attach it to the end of this document as part of the packet.

Pittsburg State University

Additional Questions

1. Additional resources required (e.g. library or multimedia resources, technology, space, major expense, etc.):
None

2. Will any additional student fees be required (e.g. equipment, clothing, travel, licensing, etc.)?
 Yes No *If "yes," please realize that it will need to gain approval of the President's Council.*

Please give the rationale for additional student fees:

3. Is this course to be considered for Pitt State Pathway? Yes No

If "yes," please indicate the University's Pitt State Pathway Goals met by this course AND the assessment data that will be collected to measure these goals:

Please realize that this requirement will need to gain approval of the Pitt State Pathway Committee after it has been approved by Faculty Senate as a new course.

4. Will this course be required of any education majors? Yes No
If "yes," please realize that this requirement will need to have the approval of the Council for Teacher Education.

5. What additional costs will be required for this course (e.g. staffing, equipment, etc.)?
None

PITTSBURG STATE UNIVERSITY
LEGISLATIVE PROCESS
AUTHORIZATION/NOTIFICATION SIGN-OFF SHEET

- Approved: Department Chairperson
Date 12/7/21 Signature, Department Chairperson Cherone Hectler
- Approved: College Curriculum Committee
Date 3/9/22 Signature, College Curriculum Committee Chair James Trumble
- Approved: Dean of College
Date 3/9/22 Signature, Dean James Trumble
- Approved: Council for Teacher Education (if applicable)
Date _____ Signature, Council for Teacher Education Chair _____
- Approved: Faculty Senate University Undergraduate Curriculum Committee
Date 03-09-2022 Signature, Undergraduate Curriculum Committee Chair [Signature]
- Approved: Faculty Senate
Date _____ Signature, Recording Secretary, Faculty Senate _____
- Approved: PittState Pathway Committee (if applicable)
Date _____ Signature, Pitt State Pathway Committee Chair _____

Each college curriculum representative will notify their respective college and department(s) of the completion of the approval process.

Originating Department: Please complete this form and upload to the SharePoint, "Undergraduate Curriculum Legislation" (within the appropriate College folder, "Preliminary Legislation"), to allow for review and questions. Any modifications should be saved as "original file name.version2.docx" (e.g. MATH 343.version 2.docx) and uploaded as well.

Please print the final version of this form, apply the appropriate signatures, and forward to the Office of the Registrar.

Please Note: This is a 2-3 month process, at least, and is designed to eliminate questions and concerns at the beginning of the process. Any questions/concerns not addressed prior to the College Curriculum Committee and the Faculty Senate University Undergraduate Curriculum Committee may result in an additional month added to the process.

Firefox

<https://outlook.office.com/mail/id/AAQkADA0Mzg2ZmYyLWU2Mm...>**Re: FCS 330 - Financial Counseling**

Stephen Horner <shorner@pittstate.edu>

Fri 10/15/2021 4:11 PM

To: Goldie Prelogar <gprelogar@pittstate.edu>; Fang Lin <flin@pittstate.edu>; Connie Shum <cshum@pittstate.edu>

All,

Thanks for your inputs. It looks like this is a go.

Steve

*Stephen V. Horner, Ph.D.**Assoc. Dean KUSB, Kelce Faculty Chair**114 Kelce**Kelce College of Business**620-235-4575*

From: Goldie Prelogar <gprelogar@pittstate.edu>**Sent:** Friday, October 15, 2021 11:26 AM**To:** Fang Lin <flin@pittstate.edu>; Connie Shum <cshum@pittstate.edu>; Stephen Horner <shorner@pittstate.edu>**Subject:** Re: FCS 330 - Financial Counseling

Thank you so much!

Goldie Prelogar Ed.S., C.P.F.F.E.

(she/her/hers)

Associate Instructional Professor

Family Financial Planning & Community and Family Services

Family & Consumer Sciences | 101F

Pittsburg State University

I may not respond to emails sent after 4pm until the next working day because of parenting small humans!

From: Fang Lin <flin@pittstate.edu>**Sent:** Friday, October 15, 2021 10:38 AM**To:** Connie Shum <cshum@pittstate.edu>; Goldie Prelogar <gprelogar@pittstate.edu>; Stephen Horner <shorner@pittstate.edu>**Subject:** RE: FCS 330 - Financial Counseling

I also think we should be okay. As long as some students take FCS 230, we should not be big overcrowding issues in FIN 210.

Fang

Fang Lin, Ph.D.

Associate Professor of Finance

Kelce College of Business

Pittsburg State University

Pittsburg, KS 66762

(620) 235-4564

From: Connie Shum**Sent:** Friday, October 15, 2021 10:32 AM**To:** Goldie Prelogar <gprelogar@pittstate.edu>; Stephen Horner <shorner@pittstate.edu>; Fang Lin <flin@pittstate.edu>**Subject:** Re: FCS 330 - Financial Counseling

Hi, Goldie, Fang, and Steve! I think I will be okay, since students may choose between FCS 230 and FIN 210.

Connie Shum

From: Goldie Prelogar <gprelogar@pittstate.edu>**Sent:** Wednesday, October 13, 2021 2:29 PM**To:** Stephen Horner <shorner@pittstate.edu>; Fang Lin <flin@pittstate.edu>**Cc:** Connie Shum <cshum@pittstate.edu>**Subject:** Re: FCS 330 - Financial Counseling

Firefox

<https://outlook.office.com/mail/id/AAQkADA0Mzg2ZmYyLWU2Mm...>

Sounds great, thank you!

Goldie Prelogar Ed.S., C.P.F.F.E.
(she/her/hers)
Associate Instructional Professor

Family Financial Planning & Community and Family Services
Family & Consumer Sciences | 101F
Pittsburg State University

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From: Stephen Horner <shorner@pittstate.edu>
Sent: Wednesday, October 13, 2021 1:08 PM
To: Goldie Prelogar <gprelogar@pittstate.edu>; Fang Lin <flin@pittstate.edu>
Cc: Connie Shum <cshum@pittstate.edu>
Subject: Re: FCS 330 - Financial Counseling

Goldie,
Thanks for your email. I am forwarding to Fang Lin who is the Program Coordinator for Finance. He may have some thoughts as well.
Steve

Stephen V. Horner, Ph.D.
Assoc. Dean KUSB, Kelce Faculty Chair
114 Kelce
Kelce College of Business
620-235-4575

From: Goldie Prelogar <gprelogar@pittstate.edu>
Sent: Wednesday, October 13, 2021 11:49 AM
To: Connie Shum <cshum@pittstate.edu>; Stephen Horner <shorner@pittstate.edu>
Subject: FCS 330 - Financial Counseling

Greetings Drs Shum and Horner,

I am developing a new Family and Consumer Sciences course related to Financial Counseling: FCS 330- Financial Counseling.

"Financial counselors help clients deal with financial topics like budgeting, debt and saving. Financial counselors often work with lower-income clients since their training focuses on issues that impact them most, such as navigating public benefits."
<https://www.nerdwallet.com/article/investing/financial-counselor>

These skills are very important for my Community and Family Services students (who work with mostly low income families). I am in the process of getting the Accredited Financial Counselor certification through the Association for Financial Counseling & Planning Education so I will be qualified to teach this course.

I already have Chair and Dean approval to propose this course for the FCS Department. I am contacting you today because I would like to add FIN 210 Financial Planning as one of the optional prerequisites (either FCS 230 OR FIN 210 would be required prior to enrollment).

Are you okay with me adding that to the syllabus and proposal?

Thank you in advance!

Goldie Prelogar Ed.S., C.P.F.F.E.
(she/her/hers)
Associate Instructional Professor

Family Financial Planning & Community and Family Services
Family & Consumer Sciences | 101F
Pittsburg State University

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Department of Family & Consumer Sciences

**Pittsburg State University
Fall 2022**

Course: FCS 330 Financial Counseling

Time: TBD

Location: Face-to-face

Instructor: Goldie Prelogar

Office: 101F FCS Building

Office Hours: Various & by appointment

Phone: (620)-235-4512

Email: gprelogar@pittstate.edu

Email is my preferred form of contact!

I. Course Description:

Personal financial counseling is a fast-growing career field. A financial counselor helps individuals and families successfully navigate a financial crisis, overcome debt, modify ineffective money management behaviors, build an effective spending plan and provide a strong financial education foundation to meet both short-term needs and long-term goals. This course will prepare you to take the Accredited Financial Counselor® exam, through AFCPE® which sets the standard in this field. Other careers this course will prepare you for are financial coach, housing counselor, and credit counselor.

Prerequisite: FCS 230 Consumer Education and Personal Finance or FIN 210 Financial Planning.

II. Course Purpose:

This course enables CFS emphasis students to bring financial education to the families and communities they serve.

III. Course Objectives

1. Summarize the complex relationship between values, attitudes, emotions, beliefs, self-esteem, and spending, saving, borrowing and investing.
2. Discuss how client culture and background affect all aspects of counseling.

These objectives are from the AFC Program Competencies:

3. Establish the counseling environment.
4. Gather client information.
5. Form a strategic counseling plan.
6. Assist a client in establishing goals and strategies to attain goals.
7. Educate a client about a cash flow statement, net worth statement, personal financial ratios, and spending plans.
8. Educate a client about financial services (checking, savings, CDs, online banking, being unbanked, etc).
9. Familiarize a client about basic tax management.
10. Discuss employment considerations with a client.
11. Educate a client about uses of credit, credit reports and scores, credit products and credit card usage.
12. Educate a client about student loans and fringe lending.
13. Educate a client on debt management including bankruptcy.
14. Educate a client on identity theft.
15. Assist the client on acquiring property (feasibility, options, and price negotiations).
16. Educate the client on renting a home, purchasing a home, and selling a home.
17. Explain consumer rights and responsibilities to a client.
18. Educate a client about financial risks (risk management, insurance, etc).
19. Educate a client about insurance products (property, health, life, & disability insurances).
20. Educate a client about investment fundamentals (risk tolerance, asset allocation, diversification, etc).
21. Educate a client about investment choices (stocks, bonds, mutual funds, real estate, alternatives and tools).
22. Educate a client about investor protection.
23. Educate a client about retirement planning (calculation tools, income sources, SS, defined benefit plans, employer sponsored plans, tax-sheltered accounts, spending in retirement).
24. Educate a client about estate planning (tools, process, how to select legal assistance, etc).

All objectives will be measured by a final comprehensive exam designed to simulate the AFC exam.

Student Assistance: Students needing assistance need to contact the Center for Student Accommodations: <https://www.pittstate.edu/office/center-for-student-accommodations/>

Syllabus Supplement: <https://www.pittstate.edu/office/registrar/syllabus-supplement.dot> Follow the link and click on the current semester.

IV. Instructional Resources:

Required Text: *Financial Counseling*. Edited by Durband, Law, & Mazzolini. Springer 2019.
May be found here: <https://link.springer.com/book/10.1007/978-3-319-72586-4>

Additional Resources: Online videos; readings; instructional materials - all in Canvas.

V. Teaching Strategies:

- Lectures
- Online materials
- Instructional Activities: individual and group
- Discussion Groups
- Videos
- Guest Speakers
- Student Projects
- Final Exam

VI. Assessment:

Students will have two weekly assignments and a final exam.

A. Overall Evaluation is based on:

- the student's ability to answer questions on objective tests;
- the completion and quality of assigned work using the PSU Writing Rubric; and
- participation and cooperation in on-line activities.
- Case studies and mock counseling session.

Grading Scale:

Grading System - grade is based on the total points awarded out of total points possible.

A = 90 - 100%; B = 80 - 89%; C = 70 - 79%; D = 60 - 69%; F = 59% and below.

Class Attendance and Instructor's Policies:

1. Participation is expected. You are responsible for all material covered in this course in its given timeframe. In the event of excessive absences (8 or more) or non-participation, the instructor will drop the student from the class.

2. All assignments must be turned in at the specified time. **Late work will not be accepted and technical issues with computers or CANVAS are not valid excuses for late work.** Have a “plan B” in mind in case you have computer issues. **Extra credit will be offered occasionally, take advantage of it as a padding or buffer for your grade.**
3. If you are involved in extracurricular activities that take you away from class; any assignments, discussions, quizzes, tests, etc. **MUST** be turned in **PRIOR** to your absence and/or **PRIOR** to the **DEADLINE** (whichever is **first**). Any questions about such assignments, discussions, quizzes, tests etc., must be brought to me **PRIOR** to the absence and/or **PRIOR** to the deadline. Being gone is not an excuse for skipping an assignment, discussion, or quiz.
4. All written work must be in full sentences, typed, and submitted electronically (uploaded to Canvas). All work must be turned in typed, in APA format, 12 point font size, Times New Roman with 1 inch margins. Assignments should begin with an introduction, have a body, and a conclusion. Any works cited should be included in an APA style Bibliography. I reserve the right to reject any assignment that is does not meet the minimum requirements outlined in that assignment or is not formatted properly. No Google docs allowed. No submissions will be accepted through email – only through Canvas uploads.
5. Online Quizzes and exams taken in Canvas must be taken on a laptop or desktop device. Do **NOT** take an exam or quiz with your mobile device.

Academic Honesty You are expected to do and submit your work and not that of others.

Please refer to the catalog for the university policy on academic dishonesty. As per the Pittsburg State University Catalog, “Academic dishonesty...is defined as unethical activity associated with course work or grades.” Additionally, “unless otherwise stated by the instructor, exams, quizzes, and out-of-class assignments are meant to be individual, rather than group, work.” A violation of the academic dishonesty policy may result in a grade of F on the assignment, in the course, and possibly dismissal from the university.

VII. Tentative Schedule:

Unit 1 Introduction

- Financial wellness (values, goals, financial stress)

- Poverty in America (socio-economic causes for money problems)
- Financial intelligence (how we learn)

Unit 2 Counseling

- Physical environment, building trust and rapport, Financial Counseling process and client/counselor roles
- Communication skills: dimensions of communication, techniques (summarizing, restating, pacing), communication barriers, resistance)
- Identify goals and values, techniques to clarify values and priorities, determine available resources and gaps
- Understand learning styles, strategies to promote behavior change and overcome barriers

Unit 3 Managing Money

- Review of financial services, basic taxes and tax management, employment considerations
- Review acquiring property and housing
- Investment fundamentals, investment choices, and investor protection
- Review retirement planning & estate planning

Unit 4 Debt

- Prioritize debts (including when you can't pay everything), solutions to cash flow challenges, dealing with debt related stress
- Property seizures and collections (debt collectors, repossession, foreclosure, lawsuits, mortgage workouts)
- Student loans (federal vs private, deferment/forbearance, repayment options) and debts to government (income tax debt, garnishments)
- Types and terms of credit (secured/unsecured, credit cards, fees, rates, usury laws)
- Credit reports and scores (factors, resources, legislation, building rebuilding and maintaining good credit)
- ID theft and fraud
- Bankruptcy (types, effects on credit, process)

Unit 5 Putting it All into Practice

- Practice counseling sessions
- Case study

Pittsburg State University

Request for Revision to Curriculum

Revision for: Major Minor Emphasis Certificate

Department: Family and Consumer Science College: College of Education

Submission Date: 11/10/2021

Revision Effective: Fall, 2022
(Year)

Contact Person: Jennifer Murray

Faculty member Chair

Name of Existing Major or Minor/Emphasis/Certificate:

Bachelor of Science, Family and Consumer Science, Emphasis Nutrition and Wellness

If proposing a name change to major or minor/emphasis/certificate, indicate Proposed Name Change:

Description of Change: The course was initially a FCS-340 Special Topics Course. The course has been legislated and updated with its permanent course number FCS-406 Sports Nutrition. The curriculum materials need to reflect this update.

Rationale for Change (include changes to curriculum objectives): The course has been legislated and has been approved with a course number. It is no longer a Special Topics course.

Is this revision related to, and/or may affect, any degree program or minor/emphasis/certificate at any other Regent university?

Yes No

Whether a "yes" or "no" response, please provide an explanation.

The course is included in the emphasis area requirements for the BS Family and Consumer Science- Nutrition and Wellness emphasis.

Is this revision related to, and/or may affect, any other department's/college's/unit's curricula or programs at Pittsburg State University?

Yes No

Whether a "yes" or "no" response, please provide an explanation. Provide documentation of any discussions (e.g. copies of e-mails, memos, etc.) that have occurred.

The course had been listed as a Special Topics course. Sports Nutrition has been legislated and given its permanent course number FCS-406.

Existing Major or Minor/Emphasis/Certificate

Copy and paste the existing curriculum as it currently appears in the online catalog:

Emphasis Area (25-32 hours)

- FCS-270 Practicum in Family and Consumer Sciences (____)(1 hour)
- FCS-285 Lifespan Human Development (3 hours)
- FCS-305 Community Nutrition (3)
- FCS-340 Topics in (____) (1-6 hours)

Possible topic could include: Contemporary Issues in Nutrition, School Nutrition, Sports Nutrition, plus others.

- FCS-401 Food Science and Preparation Techniques (3 hours)

Revision to Curriculum- Major or Minor/Emphasis/Certificate- Revised
2021WF

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- FCS-405 Advanced Nutrition and Wellness (3)
- FCS-409 Demonstration Techniques and Instructional Technology (3 hours)
- FCS-430 Family Resource Management (3 hours)
- FCS-570 Professional Internship (2-4 hours)
- FCS-571 Directed Readings in Family and Consumer Sciences (1-3 hours)

Select 3-6 hours of additional electives from:

- FCS-730 Independent Study (___) (1-3 hours)
- NURS-303 Introduction to Public Health (3 hours)
- REC-160 Introduction to Professions in Recreation, Sport and Hospitality (3 hours)

Proposed Major or Minor/Emphasis/Certificate:

List below, the proposed curriculum as you wish it to appear in the online catalog:

Emphasis Area (25-32 hours)

- FCS-270 Practicum in Family and Consumer Sciences (___)(1 hour)
- FCS-285 Lifespan Human Development (3 hours)
- FCS-305 Community Nutrition (3)
- FCS-406 Sports Nutrition (3)
- FCS-401 Food Science and Preparation Techniques (3 hours)
- FCS-405 Advanced Nutrition and Wellness (3)
- FCS-409 Demonstration Techniques and Instructional Technology (3 hours)
- FCS-430 Family Resource Management (3 hours)
- FCS-570 Professional Internship (2-4 hours)
- FCS-571 Directed Readings in Family and Consumer Sciences (1-3 hours)

Select 3-6 hours of additional electives from:

- FCS-730 Independent Study (___) (1-3 hours)
- NURS-303 Introduction to Public Health (3 hours)
- REC-160 Introduction to Professions in Recreation, Sport and Hospitality (3 hours)

Additional Questions

1. Additional resources required (e.g. library or multimedia resources, technology, space, major expense, etc.):
None at this time.

2. Will any additional student fees be required (e.g. equipment, clothing, travel, licensing, etc.)?
 Yes No *If "yes," please realize that it will need to gain approval of the President's Council.*

Please give the rationale for additional student fees:

3. Will this revision have specific PittState Pathway courses required? Yes No
Please realize that this requirement will need to gain approval of the PittState Pathway Committee.
4. Will this revision affect any education majors? Yes No
If "yes," please realize that this requirement will need to have the approval of the Council for Teacher Education.
5. What additional costs will be required for this modification (e.g. staffing, equipment, etc.)?
None anticipated at this time.

Additional Questions for certificate only:

1. Are students pursuing only this certificate eligible for federal financial assistance based on federal guidelines? (minimum of 24 hours) Yes No
2. Does the course content contained within this certificate provide relevance to employment opportunities or meet professional objectives for the student? Yes No

If "yes," to both questions, it is the department's responsibility to send a copy of this legislation form to the Director of Financial Assistance to initiate Department of Education approval.

PITTSBURG STATE UNIVERSITY
LEGISLATIVE PROCESS
AUTHORIZATION/NOTIFICATION SIGN-OFF SHEET

- Approved: Department Chairperson
Date 1/11/22 Signature, Department Chairperson Chroma Huckler
- Approved: College Curriculum Committee
Date 2/1/22 Signature, Committee Chair James Turbine
- Approved: Dean of College
Date 2/1/22 Signature, Dean James Turbine
- Approved: PittState Pathway Committee (if applicable)
Date _____ Signature, Committee Chair _____
- Approved: Council for Teacher Education (if applicable)
Date _____ Signature, Council Chair _____
- Approved: Faculty Senate University Undergraduate Curriculum Committee
Date 03-09-2022 Signature, Committee Chair [Signature]
- Approved: Faculty Senate
Date _____ Signature, President, Faculty Senate _____

Notification to COCAO/Kansas Board of Regents (if required): Date: _____

Each college curriculum representative will notify their respective college and department(s) of the completion of the approval process. If COCAO/KBOR approval is required, questions should be directed to the Provost's administrative officer at x4113.

Originating Department(s): After completing this form, in its entirety, please upload it to the SharePoint, within the appropriate College folder "Preliminary Legislation", to allow for review and questions. Any modifications should be saved as "original file name.version2.docx" and uploaded as well.

Following final College Curriculum Committee approval, please print the final version of this form, apply the appropriate signatures, and uploaded to SharePoint file, "Approved College Curriculum Legislation".

Following Faculty Senate Approval, SUBMIT (if required) SIGN-OFF SHEET AND FINAL COMPLETE PACKAGE, in electronic format, TO THE OFFICE OF THE PROVOST (220 RUSS HALL). Please check with the Provost's administrative officer at x4113 if unsure.

Please Note: This is at least a 2-3 month process from the time of first submission and is designed to eliminate concerns and questions at the beginning of the process. Any questions/concerns not addressed prior to the review by the College Curriculum Committee and the Faculty Senate University Undergraduate Curriculum Committee, may result in an additional month added to the process, before it is sent (if required) to the Kansas Board of Regents, which may result in a delay in implementation.

Hi Dr.Hicklin,

Hope all is well! Please see attached a Revision to Curriculum form for your review and signature. The Sports Nutrition course is no longer a Special Topics course. As such, the curriculum information for the BS FCS-Emphasis Nutrition and Wellness needs to reflect this change. Let me know if you need any further clarification. Thanks so much!

A handwritten signature in cursive script that reads "Jenni Murray".

