



FINA 5521: Financial Management Concentration Integration

Course Syllabus

SAMPLE

1. General Course Information

Course Title: Financial Management Concentration Integration

Credit Weight: 0.25 credits

Prerequisites: FINA 5511, and FINA 5513

Instructor: Course Description

[FINA 5521](#) integrates and applies all the accounting and finance concentration coursework. Critical thinking is stressed via the case study approach. Focuses on complex problems and allows students to gain a deeper understanding of the salient issues discussed within the financial management concentration.

2. Course Rationale

This is the capstone finance course for the MBA students specializing in Financial Management. Students are assumed to have a sound knowledge and understanding of corporate finance, investment management as well as managerial accounting and statistics gained from the pre-requisite courses.

The course will broadly cover the following three main themes:

- Defining value and wealth creation
- Measuring value and wealth and
- Understanding link between the value and value-based management

The important corporate finance concepts such as cost of capital, capital structure, valuation, etc. will be discussed to reinforce students' understanding of these main themes.

Students will also gain a better understanding of the increasingly important and strategic roles the CFOs and financial professional play for the success of their organization.

3. Course Learning Objectives

After successfully completing this course, you will be able to:

CO1	Analyze the evolving strategic roles of Chief Finance Officer (CFO) beyond traditional finance functions.
CO2	Apply the key corporate finance concepts to support management decision-making.
CO3	Identify metrics for effective measurement of financial performance.

CO4	Analyze the ramifications of the current and emerging issues on creation and distribution of company wealth.
CO5	Apply accounting information effectively while performing financial analysis.
CO6	Recommend best strategies to resolve financial issues confronting today's organizations.
CO7	Work effectively and collaboratively in a team environment to analyze live case studies and prepare a report.

4. Course Modality: Asynchronous

This is a fully online course where instructors and students share information, ideas, and learning experiences in a virtual course space. Asynchronous courses do not require participation in scheduled meetings. However, students are expected to remain up to date with the deadlines and due dates provided by the instructor. This course requires high-speed Internet access and a computer.

Technical Skills:

Minimum technical skills for the course:

- [Essential Technological Skills for Students](#) include but are not limited to:
 - Knowledge of how to transfer and share files
 - Understanding of digital storage software
 - Digital presentation skills
 - Advanced word processing skills
- Tips for [Learning in an Online Environment](#)
 - Preparing to learn in an online environment
 - Recommended technical requirements

Please note that all Carleton students receive free access to Microsoft 365 / Office.

- [Get Microsoft Office for Students](#)
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5. Student Support

Academic Support

The Centre for Student Academic Support (CSAS) is a collection of student support services designed to help you achieve your goals and improve your learning.

- CSAS can help you with academic reading, academic writing, critical thinking, time management, and more.
- For complete information on their workshops and other services, please visit the [Centre for Student Academic Support](#).

Technical Support

A variety of technical support options are available to students on our [Brightspace Student Support](#) page through documentation and videos, including information on:

- How to use Brightspace
- Communication and collaboration
- Assessments

Students can access support by phone, chat or email by contacting the [D2L Brightspace Service Desk](#).

Health and Wellness Support Services

Carleton offers a wide range of Student Support Services, including resources for mental health, healthy living, getting active, and getting support. For complete information on resources, please visit: [Carleton Wellness Resources: Supporting Your Mental Health](#).

6. Course Schedule

Please regularly check and log into Brightspace to review new content. Configure your personal notifications to opt into course announcements so that they will be emailed to your Carleton email address.

Module	Topics	Materials	Deliverable
1	Evolving strategic roles of the Chief Finance Officer (CFO)	Assigned readings and videos	Postings to the discussion forum: Initial posting due on May 12 and follow-up on posts by classmates due on May 19
2	Practical application of financial concepts to support managing decision-making.	<u>Case Study:</u> Neptune Orient Line (NOL): Valuation and Capital Structure, Harvard Business Review (Available in Library Reserve) Suggested readings: <ul style="list-style-type: none">• Luehrman T (2017), <i>Cost of Capital</i>, Harvard Business	Submission of case report on or before May 19, 2023

Module	Topics	Materials	Deliverable
		<p>Review (Available in Library Reserve)</p> <ul style="list-style-type: none"> Healy P (2017), <i>Financial Accounting Reading: Introduction to Valuation</i>, Harvard Business Review (Available in Library Reserve) 	
3	Practical Application of Economic Value-Added (EVA)	<p><u>Case Study:</u></p> <ul style="list-style-type: none"> TTK Prestige: Economic Value-Added Analysis, Harvard Business Review (Available in Library Reserve) <p><u>Suggested reading:</u></p> <ul style="list-style-type: none"> Ferri F, Ferris W, Treadwell S and Desai M (2006), <i>Understanding Economic Value-Added</i>, Harvard Business Review (Available in Library Reserve) 	<ul style="list-style-type: none"> Assignment on the case study is due on May 26, 2023.
4	<p>Current and emerging trends:</p> <ul style="list-style-type: none"> Shareholder activism Shareholder primacy or stakeholder capitalism? 	<ul style="list-style-type: none"> Beatty, David (2016), <i>Shareholder Activism: this Change is Everything</i>, Harvard Business Review (Available in Library Reserve) (MO1,2) Redefinition of the purpose of corporations - Business RoundTable Govindarajan V and Srivastava (2020), <i>We are Nowhere Near Stakeholder Capitalism</i>, Harvard Business Review (Available in Library Reserve) <p>Videos:</p> <ul style="list-style-type: none"> Activist Investing in Canada, BNN Bloomberg 	<ul style="list-style-type: none"> Postings to the discussion forum: First posting is due on June 2 and follow-up on posts by the classmates due on June 9

Module	Topics	Materials	Deliverable
		<ul style="list-style-type: none"> Business RoundTable on the Purpose of Business 	
5	Identification of metrics for effective measurement of financial performance	<ul style="list-style-type: none"> Harris, Michael, and Tayler B, (2019), <i>Don't Let the Metrics Undermine Your Business</i>, Harvard Business Review (Available in Library Reserve) Yoon, Eddie (2017), <i>Tesla Shows How Traditional Business Metrics are Outdated</i>, Harvard Business Review (Available in Library Reserve) Graham, Kenny (2021), <i>KPI are not Just About Assessing Past Performance</i>, Harvard Business Review (Available in Library Reserve) (MO 1 and 2) 	<ul style="list-style-type: none"> Posting to the discussion forum: First posting is due on June 16 and follow-up on posts by the classmates is due on June 23.
6	Final project report: Corporate Finance Decisions	<ul style="list-style-type: none"> Review of company financial statements and MD&A Any other pertinent information 	Submission of group case report to the instruction on or before 29
7	Final exam	<ul style="list-style-type: none"> All materials covered earlier modules 	TBD

7. Learning Materials

Textbook

There is no specific text books for this course.

Other Resources

- Assigned and suggested readings, videos and case studies (all materials are available in [ARES](#))

8. Grading Scheme

Activity	Scored Out of	Percent of Total Grade
Contribution to discussion forum	100	25%
Assignment	100	10%
Group case report	100	15%
Final Group Project report	100	15%
Final exam	100	35%
TOTAL	100	100%

Grading

The [Carleton University grading system](#) will be used to determine your final course grade. Letter grades correspond to the following percentages:

Percentage	Final Grade
90 - 100	A+
85 - 89	A
80 - 84	A–
77 - 79	B+
73 - 76	B
70 - 72	B–
67 - 69	C+
63 - 66	C
60 - 62	C–
57 - 59	D+
53 - 56	C
50 - 52	D–
0 - 49	F

Final grades in this course are determined by the course instructor and must be approved by the Dean. Grades submitted by the instructor are subject to revision and should not be considered final until they have been approved by the Dean.

Please keep in mind that points for individual assessment and thus your final grades are added, rather than deducted – i.e., you all start with 0 and work your way up, rather than starting at 100 and having points reduced from there. A subtle but important point.

Late Assignments

All cases reports, quizzes and posting to the discussion forum must be submitted within the due date. No late submission is accepted. However, exceptional situation such as illness, family emergency, etc. would be considered.

9. Course Evaluation

At the end of this course, students are encouraged to complete a course evaluation that will be distributed to them via email and through a course link.

10. Contribution to Program Learning Goals

MBA Learning Goal	Covered	Introduced	Taught but <u>not</u> Assessed	Taught <u>and</u> Assessed
MB1 Leadership and Collaboration <i>Graduates will be equipped for leadership and collaboration.</i>	No	No	Yes	No
MB2 Communication <i>Graduates will be effective communicators</i>	No	No	Yes	No
MB3 Critical Thinking and Problem-Solving <i>Graduates will be skilled in critical thinking and problem solving.</i>	No	No	Yes	No
MB4 Functional Knowledge <i>Graduates will have knowledge that is relevant to business and be able to apply that knowledge to address business issues, opportunities, and risks.</i>	No	No	No	Yes
MB5 Global Awareness <i>Graduates will have an appreciation of the global environment of business.</i>	No	No	Yes	No
MB6 Ethics and Responsible Management <i>Graduates will apply ethical considerations and principles of responsible management in business decision-making.</i>	No	No	Yes	No

Group Work

Group work offers opportunities to develop interpersonal, collaboration, communication, leadership, and other abilities. It is also an effective way to learn integrative skills to address complex tasks. Your professor may assign one or more group tasks, assignments, or projects in this course.

Before embarking on a specific task as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

Peer Evaluation for Group Work

To deter social loafing and ensure fairness in grading, you will be asked to assess the contribution of other group members. This information will be used when assigning the grade for the final project. The procedure is as follows: Each student should take 100 points and allocate those points to the various members of the group (including him/her/themselves) to reflect the contributions made by each member. For instance, if there are four members in a group and everyone contributed equally, each individual would receive 25 points. Conversely, if an individual contributed relatively little, the remaining group members might allocate few points to that member. To ensure that these peer evaluation scores are reasonable and free from personal bias, you may be asked to provide a detailed written explanation for your point allocation.

11. Communication

Brightspace and email are the primary means of communicating with the instructor. See the [Student Support Site](#) for more information. Please do not call the instructor's office phone.

To respond to your emails, instructors and administrators need to see your full name and Carleton University ID. For this reason, it is important to send all messages from your Carleton email account. If you do not have or have yet to activate this account, you can do so by visiting the [New Students page](#).

Instructor Response Times

Assignments will be graded with feedback (if needed) within a week. Expect to receive a reply to your question(s) within 24 hours, Monday through Friday, unless otherwise posted by the instructor.

Netiquette (Online Etiquette)

Please use the following rules of netiquette as you post to online discussions and send messages to your instructor and other students in the course:

Use **professional language**. Be positive and constructive in your feedback to replies to students. Be polite by including please and thank you. Use inclusive language and terminology.

Avoid ALL CAPS. This comes across as shouting to the reader. Instead, use **bold** formatting to emphasize words.

Use **proper language and titles** and avoid slang or profanity. Even if a word is one you consider to be "not so bad", it could be offensive to others.

Review posts and messages before saving. Check for grammar and spelling errors and restate your message when necessary.

Ask for clarification. If you do not understand an assignment or feedback from the instructor, please ask for clarification. Instructors do their best to word posts/messages as clearly as possible, but in an online environment they cannot "see" if their messages are being understood.

12. Academic Regulations

University rules regarding registration, withdrawal, appealing marks, and related matters can be found at [General Graduate Regulations](#).

13. Requests for Academic Accommodation

Carleton University is committed to academic accessibility for all individuals. Academic accommodation refers to educational practices, systems, and support mechanisms that accommodate diversity and difference and allow students to perform the essential requirements of their academic programs. The processes for submitting these requests are as follows:

Pregnancy

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, please visit the [Equity Services website: Student Guide to Academic Accommodation](#).

Religious Obligations

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, please visit the [Equity Services website: Student Guide to Academic Accommodation](#).

Students with Disabilities

If you have a documented disability that requires academic accommodation in this course, please contact the Paul Menton Centre for Students with Disabilities (PMC) at 613-520-6608 or pmc@carleton.ca for a formal evaluation or contact your PMC coordinator to send your instructor your Letter of Accommodation at the beginning of the term. You must also contact the PMC no later than two weeks before the due date of the first assignment or exam for which you require accommodation. After requesting accommodation from PMC, be sure to communicate with your instructor to ensure that the necessary accommodation arrangements are in place.

Survivors of Sexual Violence

As a community, Carleton University is committed to maintaining a positive learning, working and living environment where sexual violence will not be tolerated, and its

survivors are supported through academic accommodations as per Carleton's Sexual Violence Policy. For more information about the services available at the university and to obtain information about sexual violence and/or support, visit: [Carleton's Sexual Violence Policy](#).

For more information on academic accommodation, please consult Carleton's [Course Outline Information on Academic Accommodation](#).

14. Academic Integrity

Carleton University's Academic Integrity Policy defines plagiarism as "*presenting, whether intentionally or not, the ideas, expression of ideas or work of others as one's own.*" This includes reproducing or paraphrasing portions of someone else's published or unpublished material, regardless of the source, and presenting these as one's own without proper citation or reference to the original source.

Plagiarism is a serious offence that cannot be resolved directly by the course instructor. The Associate Dean of the Faculty conducts a rigorous investigation, including an interview with the student, when an instructor suspects a piece of work has been plagiarized. Penalties are not trivial. They can include a final grade of "F" for the course.

Examples of plagiarism include, but are not limited to:

- Any submission prepared in whole or in part by someone else;
 - Using ideas or direct, verbatim quotations, paraphrased material, algorithms, formulae, scientific or mathematical concepts, or ideas without appropriate acknowledgment;
 - Using someone else's data or research findings without acknowledgement;
- Failing to acknowledge sources through the use of proper citations when using another's work and/or failing to use quotations marks.

Violations of academic integrity also include:

- Using unauthorized material when completing an assignment or exam,
- Fabricating or misrepresenting research data;
- Unauthorized co-operation or collaboration, and;
- Completing work for another student.

Academic integrity violations constitute a serious academic offence, weaken the quality of the degree, and will not be tolerated. Penalties may include: a failing grade for the submitted work and/or course; academic probation; a refusal of permission to continue or to register in a specific degree program; suspension from full-time studies; suspension from all studies at Carleton, and; expulsion from Carleton.

Students should familiarize themselves with and follow the Carleton University Student Academic Integrity Policy, which is available, along with resources for compliance, at: [Student Academic Integrity Policy](#).

15. Course Copyright

Materials used in this course—including lectures, PowerPoint presentations, discussions, learning activities, posted notes, case studies, assignments, and exams—are copyright protected and remain the intellectual property of their respective author(s). They are intended for personal use and may not be reproduced or redistributed without prior written consent of the author(s).

Students registered in this course may take notes and make copies of course materials for their own educational use only. Students may not reproduce or distribute lecture notes and course materials publicly for commercial or non-commercial purposes without express written consent from the copyright holder(s).

16. Equity and Inclusion

All members of the Carleton University community share responsibility for ensuring that the University's educational, work and living environments are free from discrimination and harassment. Should you have concerns about harassment or discrimination relating to your age, ancestry, citizenship, colour, creed (religion), disability, ethnic origin, family status, gender expression, gender identity, marital status, place of origin, race, sex (including pregnancy), or sexual orientation, please visit the website of Carleton's [Department of Equity and Inclusive Communities](#).