



**Meeting Minutes**  
**GWC Business Advisory Committee**  
**September 3, 2021**  
**Division of Business and Career Education**

*The purpose of the advisory committee is to provide input and make recommendations to the faculty and administration on changes in direction for the career education programs. These recommendations include suggestions for improvement, expansion, student recruitment, innovation, and/or equipment commonly found in industry that is associated with the pertinent career program.*

**Business/Industry/Community Members Present:**

Edgar Corona Sports Media, Entertainment Marketing- Clorox Company  
Jason Harris Allianz/State/Pimco Financial Management  
Teresa Le Repro X-Press, CEO, DingTea by Phybie, CEO  
Scott Klimczak Jabil Circuits, Sr. Director, Former CEO of Chad Industries  
Joe Raszewski, CFP First Foundation Advisors, Wealth Advisor  
Davina Samuel, VP Union Bank

**GWC Faculty/Staff/Guests/District Members Present:**

Bern Baumgartner GWC, Instructor, Department Chair  
Guy Buker GWC, Part-Time Instructor / Owner  
Dorsie Brooks GWC, Grants Coordinator  
Sarah Efthymiou GWC, Part-Time Instructor / PLC, Attorney  
Stephanie Hoon GWC, Part Time Instructor  
Jill Kiefer GWC, Division Office Coordinator  
Andrew Moore GWC, Part-Time Instructor / Epson, Product Manager  
Alice Rivera GWC, Instructor, Accounting  
Chris Whiteside GWC, Executive Dean, Business & Career Education

**Welcome and Objectives:**

Bern Baumgartner convened the meeting at 12:31pm  
Members introduced themselves

**Review/Approve Mar 26, 2021 Meeting Minutes- Unanimously approved**

**Quick GWC Updates:**

- GWC is mostly still online, with 25% of classes on campus
- Fall Semester started this week
- Spring Semester planning in progress.
- Program Review Process- Two-year process- every two years
- State Update- Funding good for Community Colleges
  - Federal funding may be possible as well



# Meeting Minutes GWC Business Advisory Committee September 3, 2021 Division of Business and Career Education

## Review/Approve Proposed Investing & Finance Certificate of Achievement

Slide for Discussion:

<h3 style="text-align: center;">Investing &amp; Finance Certificate Program</h3> <p><b>Objective:</b> To expand upon existing GWC personal finance, investment, accounting and customer service courses to create a practical, comprehensive Investing and Finance, 12 -Unit Certificate of Achievement Program.</p> <p><b>Target Student:</b></p> <ul style="list-style-type: none"> <li>• Students seeking skills to obtain entry -level positions in financial services and/or banking.</li> <li>• Returning students seeking to improve investment and finance knowledge.</li> <li>• Existing GWC students intrigued by opportunities to learn more about investing, personal finance and banking.</li> </ul>	<h3 style="text-align: center;">Investing &amp; Finance Certificate Program</h3> <p style="text-align: center;"><b>Proposed Course Outline</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td>BUS G121 – Personal Finance</td> <td style="text-align: right;">3.0 Units</td> </tr> <tr> <td>MGMT G155 – Customer Service</td> <td style="text-align: right;">3.0 Units</td> </tr> <tr> <td>ACCT G163 – Basic Accounting Concepts</td> <td style="text-align: right;">1.5 Units</td> </tr> <tr> <td>Investing Fundamentals – Choose 3 courses at 1.5 units each</td> <td style="text-align: right;">4.5 Units</td> </tr> <tr> <td><b>Total Required Units</b></td> <td style="text-align: right;"><b>12.0 Units</b></td> </tr> </table> <p style="text-align: center;"><b>Investing Fundamentals Course Options.</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <p style="text-align: center;"><b>Phase 1</b></p> <ul style="list-style-type: none"> <li>❖ BUS G165- Investing in Stocks</li> <li>❖ BUS G166- Investing in Bonds/Fixed Income</li> <li>❖ BUS G167- Investing in Funds</li> </ul> </td> <td style="width: 50%; vertical-align: top;"> <p style="text-align: center;"><b>Future proposed courses</b></p> <ul style="list-style-type: none"> <li>❖ Banking/Financial Services</li> <li>❖ Investing in Alternative Assets</li> <li>❖ Investing – Asset Allocation/Portfolio Construction</li> <li>❖ Investing – Derivatives &amp; Advanced Approaches</li> <li>❖ Investing – Tax Management</li> </ul> </td> </tr> </table>	BUS G121 – Personal Finance	3.0 Units	MGMT G155 – Customer Service	3.0 Units	ACCT G163 – Basic Accounting Concepts	1.5 Units	Investing Fundamentals – Choose 3 courses at 1.5 units each	4.5 Units	<b>Total Required Units</b>	<b>12.0 Units</b>	<p style="text-align: center;"><b>Phase 1</b></p> <ul style="list-style-type: none"> <li>❖ BUS G165- Investing in Stocks</li> <li>❖ BUS G166- Investing in Bonds/Fixed Income</li> <li>❖ BUS G167- Investing in Funds</li> </ul>	<p style="text-align: center;"><b>Future proposed courses</b></p> <ul style="list-style-type: none"> <li>❖ Banking/Financial Services</li> <li>❖ Investing in Alternative Assets</li> <li>❖ Investing – Asset Allocation/Portfolio Construction</li> <li>❖ Investing – Derivatives &amp; Advanced Approaches</li> <li>❖ Investing – Tax Management</li> </ul>
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- Securities Course is too much too much, need to break it out. Seeing demand for this area.

Discussion about new program proposal:

- Samuel, D- If employees came in to the bank with some banking knowledge then those people would be ahead of others who are looking for a job. Banking and Financial Services class would cover it.
- Baumgartner, B- How many hours does the Bank spend training?
  - Samuel- 3-4 weeks of training before on the floor, 6-8 weeks before really independent.
  - Baumgartner- Is there a potential that a student could collaborate on that would it be in-lieu of the institutional training?
  - Samuel- Still need to take the certifications, but it would make the process easier for them.
- Le- Customer Service addition really good- we expect those skills
- Whiteside- Partner JVS does a teller boot camp, might be a good gateway into GWC program
  - JVS has been looking for Banking and Investing next steps
- Baumgartner- Maybe asking Davina to help structure this banking class – She said yes!
  - Want to move on it quickly
- Raszewski- Also work at a bank- regulators require employees to complete training each year. Generally one hour certificate courses that people have to go through it. Continuing education is required for Banking. But it would not replace what is required by the banks.
- Baumgartner- The Business Ethics class- would that be something that would be good to have in this certificate program?
  - Raszewski- CFP 15 Continuing Ed credits are required each year.
- Efthymiou- Ethics should be woven into all the Business courses that we offer.
- Samuel, Moore, Buker- Include it, but not as a separate class.
- Moore- Ethics and compliance training also at Epson
- Baumgartner- could include it in the Banking class- Business financial services
- Baumgartner- hearing not to add a separate course but infuse it throughout.
- Buker- Could create a 1.5 unit class
- Harris- There is a lot of meat in this topic, lots of important aspects. Might be a lot for a 1.5 unit course for Banking. Might need to make it a 3 unit course. Might need to expand based on this conversation. (27 lecture hours for 1.5) (54 lecture hours for 3 Unit)
- Baumgartner- Banking Training- How much actual time in hours are these people working? IS it full 8 hour days.
- Whiteside- \* 0504.00 – Banking and Finance
  - Financial sectors of the general economy to prepare individuals to engage in financial or banking services. Includes bank management, investments, and loan analysis and management.



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- Rivera- Is there a program elsewhere that we could look at and see if another college has a similar program that we could build off of?
  - o Will look into it.
  - o <https://www.ed2go.com/saccomserv/online-courses/stocks-bonds-and-investing-oh-my/>
- Rivera- This is a great opportunity for us to set us apart.
- Brooks- Would a Cyber Security for Business class be worthwhile?
  - o Raszewski- Not necessarily the Technology focused area, might be ambitious
  - o Samuel- Davina, not a fundamental- but more a tech side of the house, not necessarily retail
- Investing in Funds- Want to make sure the title is marketable and grabs people’s attention.
- Baumgartner- Shared the COR Program request form-
  - o No objections to moving forward as is
  - o Program is recommended by the body to put forward the Investing and Finance Certificate

**Review/Approve Proposed Stackable Business Certificates/Degrees Program**

- Baumgartner- Reintroduce, you saw at the last meeting in March as well, this is with incorporating some of your feedback.
- Stackable to include

## Business Fundamentals COA

- Expose students to various Business Career pathways and fundamental business knowledge.
- Create 1<sup>st</sup> Stack of Stackable Certificates/Degrees.

<b>Business Fundamentals - Certificate of Achievement</b>		
Course	Title	Units
BUS G100	Introduction to Business	3
BUS G101	The Mindset of Business Success	3
BUS G139	Business Communication	3
Total Units		9

**Types of Jobs:**

- Office Assistant
- Sales Associated

**Skills Development:**

- Communication
- Business Soft Skills
- Basic/Broad Business Terminology



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## Business Management COA

- Builds on Business Fundamentals COA
- Types of Jobs:
  - Office Asst.
  - Asst. Manager
  - Retail Management
- Skills Development
  - Communication
  - Planning & Organization
  - Team Management
  - Ethical Issues in Business

Management - Certificate of Achievement		
Course	Title	Units
BUS G100	Introduction to Business	3
BUS G101	The Mindset of Business Success	3
BUS G139	Business Communication	3
MGMT G110	Elements of Management	3
MGMT G140	Business and Organizational Ethics	3
<b>Choose 1 of the following courses:</b>		
MGMT G111	Human Resource Management	3
MGMT G152	Starting a Business / Entrepreneurship	3
MGMT G162	Owning or Growing a Small Business	3
MKTG G135	Retail Management	3
MGMT G115	Essentials of Organizational Behavior	3
MGMT G130	Team Building and Group Dynamics	3
MGMT G155	Customer Service	3
ACCT G100	Introduction to Accounting	3
Bus G108	Legal Environment of Business	3
or		
BUS G110	Business Law	3
BUS G121	Personal Finance	3
BUS G210	Securities and Investment	3
<b>Total Units</b>		<b>18</b>

## Business Management AA

- Builds on Business Fundamentals COA
- Builds on Business Management COA
- Types of Jobs:
  - Asst. Manager
  - 1<sup>st</sup> Line Supervisor
  - Retail Management
- Skills Development
  - Communication
  - Planning & Organization
  - Team Management
  - Ethical Issues in Business
  - Financial Basics/Understanding

Management - Associate in Arts Degree		
Course	Title	Units
BUS G100	Introduction to Business	3
BUS G101	The Mindset of Business Success	3
BUS G139	Business Communication	3
MGMT G110	Elements of Management	3
MGMT G140	Business and Organizational Ethics	3
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MGMT G130	Team Building and Group Dynamics	3
MGMT G155	Customer Service	3
ACCT G100	Introduction to Accounting	3
ACCT G101	Financial Accounting	4
ACCT G102	Managerial Accounting	4
Bus G108	Legal Environment of Business	3
or		
BUS G110	Business Law	3
BUS G121	Personal Finance	3
BUS G210	Securities and Investment	3
<b>Total Major Units</b>		<b>24-26</b>
IGET/CSU-GE Pattern		
		21-39
<b>Degree Total Units (Maximum)</b>		<b>60</b>



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## Marketing COA

- Leverages Business Fundamentals COA
- Types of Jobs
  - Marketing Assistant
  - Market Research Assistant
  - Business Development
- Skills Development
  - Communication
  - Marketing Principles
  - Digital Marketing / eCommerce
  - Market Research Techniques
  - Customer Service
  - Social Media Marketing

Marketing - Certificate of Achievement		
Course	Title	Units
BUS G100	Introduction to Business	3
BUS G139	Business Communication	3
MKTG G100	Principles of Marketing	3
MKTG G140	Digital Marketing & Electronic Commerce	3
MKTG G157	Finding and Knowing Your Customer	1.5
MKTG G167	Marketing and Social Media for Entrepreneurs	1.5
MGMT G155	Customer Service	3
<b>Total Units</b>		<b>18</b>

## Marketing AA

- Leverages Business Fundamentals COA
- Types of Jobs
  - Marketing Assistant/Specialist
  - Market Analyst
  - Business Development
- Skills Development
  - Communication
  - Marketing Principles
  - Digital Marketing / eCommerce
  - Market Research Techniques
  - Customer Service
  - Social Media Marketing
  - Managerial Skills

Marketing - Associates in Arts Degree		
Course	Title	Units
BUS G100	Introduction to Business	3
BUS G139	Business Communication	3
MKTG G100	Principles of Marketing	3
MKTG G140	Digital Marketing & Electronic Commerce	3
MKTG G157	Finding and Knowing Your Customer	1.5
MKTG G167	Marketing and Social Media for Entrepreneurs	1.5
MGMT G155	Customer Service	3
<b>Choose 2 of the following courses:</b>		
MKTG G135	Retail Management	3
BUS G101	The Mindset of Business Success	3
MGMT G110	Elements of Management	3
MGMT G152	Starting a Business/Entrepreneurship	3
<b>Total Major Units</b>		<b>24</b>
IGETC/CSU-GE Pattern		21-39
<b>Degree Total Units (Maximum)</b>		<b>60</b>



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## HR Mgmt COA

- Builds on Business Fundamentals COA
- Types of Jobs
  - HR Assistant/Clerk
  - Recruiter
  - Training & Development Coordinator
  - Payroll Assistant
- Skills Development
  - HR Processes
  - Communication
  - Accounting Payroll Basics

Human Resource Management - Certificate of Achievement		
Course	Title	Units
BUS G100	Introduction to Business	3
BUS G139	Business Communication	3
MGMT G111	Human Resource Management	3
ACCTG110	Payroll Accounting and Taxation	3
Bus G108	Legal Environment of Business	3
or		
BUS G110	Business Law	3
<i>Choose 1 of the following courses:</i>		
MGMT G110	Elements of Management	3
MGMT G115	Essentials of Organizational Behavior	3
MGMT G130	Team Building and Group Dynamics	3
MGMT G140	Business and Organizational Ethics	3
Total Units		18

## Retail Mgmt COA

- Builds on Business Fundamentals COA
- Types of Jobs
  - Asst. Buyer
  - Asst. Store Manager
  - Merchandising Rep.
- Skills Development
  - Communication
  - Customer Service
  - Retail Fundamentals
  - Marketing Fundamentals

Retail Management - Certificate of Achievement		
Course	Title	Units
BUS G100	Introduction to Business	3
BUS G139	Business Communication	3
MKTG G135	Retail Management	3
MGMT G155	Customer Service	3
<i>Choose 2 of the following courses:</i>		
MGMT G110	Elements of Management	3
MGMT G111	Human Resource Management	3
MGMT G162	Owning or Growing a Small Business	3
MGMT G115	Essentials of Organizational Behavior	3
MGMT G130	Team Building and Group Dynamics	3
MKTG G100	Principles of Marketing	3
MKTG G140	Digital Marketing & Electronic Commerce	3
Total Units		18

Baumgartner- Requested Approval to move forward and was granted recommendation to proceed

No objections to moving forward.



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**Other Ideas, Questions, Suggestions**

- Global Trade and Logistics
- Data Analytics
- Crypto Currency- included in Phase 2 of Investing

**RECOMMENDATIONS and ACTION ITEMS / COMMITTEE APPROVAL**

**Employers approved modifications to the existing programs listed (via Zoom chat).**

- **Business Fundamentals Certificate**
- **Business Management Certificate**
- **Business Management Associate**
- **Marketing Certificate**
- **Marketing Associate**
- **HR Management Certificate**
- **Retail Management Certificate**

**Employers approved new certificates (via Zoom chat).**

- **Investing & Finance Certificate**

Recommendations will be incorporated into revised or new curriculum.

Thank you

Adjourned 2:00pm