



Atlantic Technological University Sligo
PROGRAMME VALIDATION PANEL REPORT FORM

Date of Evaluation	13 th March 2023
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Programmes Title(s)	Master of Business in Financial Planning and Sustainability Postgraduate Certificate in Financial Management and Sustainability
Award Title(s):	Master of Business in Financial Planning and Sustainability Postgraduate Certificate in Financial Management and Sustainability
Programme Code(s)	SG_BFINA_M09 (TBC) SG_BFINA_S09 (TBC)
NFQ Level	9
ECTS credits	90 ECTS 30 ECTS

Evaluation Panel Member:

Name & title	Job title & place of work	Role on panel
Cathal Kearney	Former Head of School of Business, Dundalk	Chairperson
Dr Angela Gao	Lecturer in Accounting and Finance, University of Sussex Business School	Academic representative
Dr Benjamin Lynch	Lecturer in Finance, TU Dublin	Academic representative
Eamonn Kielty	Managing Director, Profiles – Money Plus	Industry representative
Dr Aodhmar Cadogan	Assistant Registrar, ATU Sligo	Recording Secretary

Declaration Regarding Any Conflicts of Interest: The members of the Panel signed a form confirming that they did not have any conflict of interest.

Meeting groups

Institute Management: Dr Breda McTaggart, Dr Tomás O Faherty, Dr Valerie McTaggart, Dr Marie Moran.

Programme development team: Dr Breda McTaggart, Dr Tomás O Faherty, Dr Valerie McTaggart, Dr Marie Moran, Eva Lavin.

Persons met by validation panel

Name & title	Role in Institute	Rationale for presence at validation.
Joanne Keane	CEO, Life Insurance Ireland (LIA),	Collaborative Education Partner
Bill Hannon	Chief Academic Officer, LIA	Collaborative Education Partner
Eva Lavin	Head of Education, LIA	Collaborative Education Partner
Rosaleen Rooney	QA Officer, ATU Sligo	Collaborative Programme Administrator
Sandra Hallinan	Lecturer, ATU Sligo	Programme Team
Maria Scanlon	Lecturer, ATU Sligo	Programme Team
Brian Grimes	Lecturer, LIA	Collaborative Partner Lecturer
Emer Kirk	Lecturer, LIA	Collaborative Partner Lecturer
John Walsh	Lecturer, ATU Sligo	Programme Team

Note: In the context of this report, a condition indicates an action or amendment which in the view of the validation panel must be undertaken prior to the commencement of the new (or revised) programme. Conditions are mandatory for Approval of the Programme(s). A recommendation indicates an action or amendment which in the view of the panel should be given serious consideration by the programme development team for implementation.

Validation criteria	
<p>Rationale for the programme</p> <ul style="list-style-type: none"> • Philosophy underpinning the programme e.g. market for programme in the region and its relevance to the region • Graduate profile and employment opportunities for graduates • Rationale for the programme e.g. School's/Institute's strengths/opportunities • Programme Aims and Objectives • Expected intellectual development and Programme learning outcomes • Related existing programmes. 	<p>Sufficient evidence provided.</p> <p>Very close relationship with the professional body, LIA, was welcomed and evident throughout the discussions.</p> <p>See condition 4 in relation to the PLO for the embedded certificate.</p>
<p>Commendation: The panel commended the work the programme team had completed to put together in preparation of the excellent submission documentation. The team was particularly impressive in the detail and thought that underpinned the proposal. This was in evidence during the panel discussions.</p>	
<p>Programme structure</p> <ul style="list-style-type: none"> • Delivery type (semesterised or stage-based) • Proposed mode of delivery (i.e. in-class, on-line, blended, full time and/or part time) • Planned intake numbers (over the full duration of the programme) • Role of placement N/A 	<p>Sufficient evidence provided</p> <p>See condition 2 below in regard to Governance module</p>
<p>Resources (over the full duration of the programme)</p> <ul style="list-style-type: none"> • Facilities and human and material resources available to mount the programme • Clarification of any staffing requirements • Location of the delivery • Specific s requirements: lecture rooms, laboratories, library, Information technology and other student supports • Confirmation regarding any new facilities and staffing requirements • Special requirements (e.g. remote access for distance learners) 	
<p>Sufficient evidence provided</p> <p>No additional resources required.</p>	

<p>Access, Transfer and Progression Criteria</p> <ul style="list-style-type: none"> • Student admission requirements • Progression criteria from one stage to the next and to higher levels on the NFQ • Non-standard entry (e.g. mature candidates and candidates with experiential learning) • Transfer policy into the programme and onto other programmes 	Sufficient evidence provided
<p>Curriculum</p> <ul style="list-style-type: none"> • A matrix exhibiting the academic pathway and the relationship between modules • The consistency between the programme content, teaching methods and the programme learning outcomes • Balance between the depth and breadth of the programme • Rigour of the academic standard in the final stage of the programme • Student workload • Practice: the role and management of placement or work-based projects. N/A 	<p>Sufficient evidence provided</p> <p>See condition 1 in relation to the Sustainable finance module</p> <p>See condition 2 in relation to the addition of Corporate Governance content.</p> <p>See condition 3 in relation to content.</p>
<p>Assessment</p> <ul style="list-style-type: none"> • The appropriateness of the modes of assessment to be used • The balance between the marks awarded for different assessment modes (e.g. continuous assessment, projects, reports, sit-down examination) • Confirmation that all of the programme learning outcomes are appropriately and adequately assessed within the set of module assessments. 	Sufficient evidence provided
<p>Commendation:</p> <p>The panel welcome the move away from final terminal exams for the final 30 ECTS of the programme. To help the students adjust to this type of assessment, see recommendation 6</p>	
<p>Staffing</p> <ul style="list-style-type: none"> • Quality and specialities of staff available to support the programme • Technical and administrative support 	<p>Sufficient evidence provided</p> <p>No additional staffing requirements</p>

<ul style="list-style-type: none"> • Staff development • Industrial/commercial profile of staff • Research and publications 	
<p>Programme Administration and Quality Assurance</p> <ul style="list-style-type: none"> • Procedure for managing programme • Student support student counselling and tutorial arrangements • Aspects of programme which highlight and foster study skills, independent learning and the inculcation of individual responsibility in students • EU and international aspects if appropriate • Feedback mechanisms e.g. use of surveys, focus groups and follow-up actions. 	<p>Sufficient evidence provided</p> <p>Current QA arrangement are sufficient</p>
<p>Over all Conditions and Recommendations</p>	
<p>Conditions:</p> <ol style="list-style-type: none"> 1. In the module Sustainable Finance, review content to include more content on sustainable investing and reflect this change to content in one of the Learning outcomes. 2. Include a module on corporate governance / corporate social responsibility and sustainability in the programme. This may require a splitting of modules and/or a reduction in content of the proposed modules. 3. Include content on sustainability investment, planning and client profiling in compliance with SFDR regulation in some part of the programme. 4. Review and reduce the programme learning outcomes for the Certificate, remove error discussed during panel. <p>Recommendations:</p> <ol style="list-style-type: none"> 1. Review the module learning outcomes of the modules in the 30ECTS certificate to ensure the verbs are appropriate to the learning outcomes at level 9. 2. Review the schedule and how it is presented to student page 8&9 in document in regard to the setting for stages and semesters. 3. Update reading material for all modules to ensure reading material is on the current editions and appropriate to the module content. 4. In the Client Management Module, remove the reference to a module on another programmes that is in the assessment strategy 5. Consider including more Online resources (non-Book type resources) in new modules 6. The panel recommends that the additional supports that are available to students in writing skills, digital skills and research skills are mentioned somewhere in the Assessment strategy / or Teaching and Learning Strategy 	

Overall decision of the panel

The panel agreed to recommend to the Academic council the approval of the following programmes, pending a desktop review of a revised submission of the document by the panel.

Master of Business in Financial Planning and Sustainability

Postgraduate Certificate in Financial Management and Sustainability

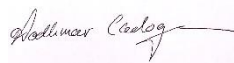
Chairperson:



Date 17/03/2023

Mr Cathal Kearney

Secretary:



Date: 16/03/2023

Dr Aodhmar Cadogan

Programme Schedule (include table from AMM)

To be added following the desktop review by the panel, as mentioned above.

SG_BFINA_M09

Module Code	Module Title	Semester	M/E	OL Hours	Credits	CA %	PRAC %	PROJ %	EXAM %
LIA09001	Principles and Practices of Financial Planning	Semester 1	Mandatory	2.5	10	50	0	0	50
LIA09002	Retirement Planning	Semester 1	Mandatory	2.5	10	50	0	0	50
LIA09003	Investment Management	Semester 1	Mandatory	2.5	10	50	0	0	50
LIA09004	Tax and Estate Planning	Semester 2	Mandatory	2.5	10	50	0	0	50
LIA09005	Risk Management and Insurance Planning	Semester 2	Mandatory	2.5	10	50	0	0	50
LIA09006	Integrated Personal Financial Planning	Semester 2	Mandatory	2.5	10	100	0	0	0
ACCT09002	Financial Management	Semester 3	Mandatory	2.27	5	100	0	0	0
FIN09003	Sustainable Finance	Semester 3	Mandatory	2	10	100	0	0	0
MGMT09036	Client Management	Semester 4	Mandatory	2	10	50	0	50	0
MGMT09025	Strategy and Practice	Semester 4	Mandatory	2.27	5	55	0	0	45

SG_BFINS_S09

Module Code	Module Title	Semester	M/E	OL Hours	Credits	CA %	PRAC %	PROJ %	EXAM %
ACCT09002	Financial Management	Semester 1	Mandatory	2.27	5	100	0	0	0
FIN09003	Sustainable Finance	Semester 1	Mandatory	2	10	100	0	0	0
MGMT09025	Strategy and Practice	Semester 2	Mandatory	2.27	5	55	0	0	45
MGMT09036	Client Management	Semester 2	Mandatory	2	10	50	0	50	0