

2017-18 Assessment Cycle

## Assessment Findings

### Finding per Measure

#### Financial Planning Program (BBA) Outcome Set

Outcome

##### **Outcome : 1. Demonstrate competence in domestic and global environments within the principle functional areas of business. (IL)**

Demonstrate competence in domestic and global business in the major disciplines of personal finance, accounting, economics, marketing, law, and management.

▼ **Measure:** End of Program Exam  
*Program level ; Direct - Exam*

Details/Description:	The students will take their End of Program Exam in FSMA 7123 Personal Financial Planning Capstone.
Acceptable Target:	50% of students will correctly answer 70% or more of the multiple choice questions.
Ideal Target:	70% of students will correctly answer 70% or more of the multiple choice questions.
Implementation Plan (timeline):	The End of Program Exam will be administered every year starting in 2017-2018.
Key/Responsible Personnel:	FSMA 7123 Instructor Danielle Green Mark Bloxsom

Supporting Attachments:

[BBA Financial Planning End of Program Exam \(Adobe Acrobat Document\)](#)


Findings for End of Program Exam

Summary of Findings: 56% of students correctly answered 70% or more fo the exam questions.

Results : Acceptable Target Achievement: Met;  
Ideal Target Achievement: Approaching

Reflections/Notes:

Substantiating Evidence:

 Financial Planning, BBA End of Program Exam Results (Adobe Acrobat Document)

**These Findings are associated with the following Actions:**

End of Program Exam  
Action Plan  
(Continuous Improvement  
Action; 2017-18 Assessment  
Cycle)

▼ **Measure:** Exit Survey  
*Program level ; Indirect - Survey*

Details/Description: All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.

Acceptable Target: 70% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.

Ideal Target: 80% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.

Implementation Plan (timeline): The BBA in Financial Planning Exit Survey will be administered to all graduating students through Blackboard starting in academic year 2017-2018. This survey will be administered every year for

graduating students.

Key/Responsible  
Personnel:

Jeff Lokey  
Danielle Green  
Mark Bloxsom  
BBA in Financial Planning Curriculum Coordinator

Supporting Attachments:

[BBA Financial Planning Exit Survey \(Adobe Acrobat Document\)](#)

### Findings for Exit Survey

Summary of Findings: 33% of students indicated "agree" or higher in achieving each of the program student learning outcomes

Results : Acceptable Target Achievement: Not Met;  
Ideal Target Achievement: Approaching

Reflections/Notes:

Substantiating Evidence:

[Financial Planning Student Exit Surveys \(Adobe Acrobat Document\)](#)

**These Findings are associated  
with the following Actions:**

PSLO 1 - Indirect  
Measure  
(Continuous Improvement  
Action; 2017-18  
Assessment Cycle)


**Outcome : 2. Analyze personal finance problems and devise solutions using critical**

## thinking, decision-making processes, and decision-support tools.(CT

### ▼ **Measure:** Exit Survey *Program level ; Indirect - Survey*


Details/Description:	All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.
Acceptable Target:	70% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Ideal Target:	80% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Implementation Plan (timeline):	The BBA in Financial Planning Exit Survey will be administered to all graduating students through Blackboard starting in academic year 2017-2018. This survey will be administered every year for graduating students.
Key/Responsible Personnel:	Jeff Lokey Danielle Green Mark Bloxson BBA in Financial Planning Curriculum Coordinator

#### Supporting Attachments:

 BBA Financial Planning Exit Survey (Adobe Acrobat Document)

#### Findings for Exit Survey

Summary of Findings:	100% of students indicated "agree" or higher in achieving each of the program student learning outcomes
Results :	Acceptable Target Achievement: Exceeded; Ideal Target Achievement: Exceeded
Reflections/Notes:	
Substantiating Evidence:	

 Financial Planning Student Exit Surveys (Adobe Acrobat Document)


**These Findings are associated with the following Actions:**

PSLO 2 - Indirect Measure  
(Continuous Improvement Action; 2017-18 Assessment Cycle)

▼ **Measure:** Financial Planning Internship  
*Program level ; Direct - Other*

Details/Description:	All Financial Planning Students will complete the Financial Planning Internship. This outcome will be evaluated by the student's employer as part of the final review paperwork.
Acceptable Target:	70% of students will achieve "above average" or higher for this outcome on the employer final evaluation.
Ideal Target:	80% of students will achieve "above average" or higher for this outcome on the employer final evaluation.
Implementation Plan (timeline):	The employer final evaluation will be administered in FSMA 7112 each semester starting in Fall 2017-2018.
Key/Responsible Personnel:	Danielle Green Mark Bloxsom Financial Planning Internship Coordinator

Supporting Attachments:

 BBA Financial Planning Internship Evaluation Form (Adobe Acrobat Document)


## Findings for Financial Planning Internship

Summary of Findings: 100% of students achieved above average or higher on the employer final evaluation.

Results : Acceptable Target Achievement: Exceeded; Ideal Target Achievement: Exceeded

Reflections/Notes: Six of the eight students used the wrong internship evaluation form.

Substantiating Evidence:

 Financial Planning, BBA Spring 2018 Internship Evaluation Form (Adobe Acrobat Document)

**These Findings are associated with the following Actions:**

Internship Action Plan  
(Continuous Improvement  
Action; 2017-18 Assessment  
Cycle)

**Outcome : 3. Formulate a financial plan while integrating the major functional areas of personal finance.**

▼ **Measure:** Exit Survey  
*Program level ; Indirect - Survey*

Details/Description: All students will take the BBA in Financial Planning

Acceptable Target:	Exit Survey administered through Blackboard. 70% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Ideal Target:	80% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Implementation Plan (timeline):	The BBA in Financial Planning Exit Survey will be administered to all graduating students through Blackboard starting in academic year 2017-2018. This survey will be administered every year for graduating students.
Key/Responsible Personnel:	Jeff Lokey Danielle Green Mark Bloxsom BBA in Financial Planning Curriculum Coordinator

Supporting Attachments:

[BBA Financial Planning Exit Survey \(Adobe Acrobat Document\)](#)

Findings for Exit Survey

Summary of Findings: 67% of students indicated "agree" or higher in achieving each of the program student learning outcomes

Results : Acceptable Target Achievement: Not Met;  
Ideal Target Achievement: Approaching

Reflections/Notes:

Substantiating Evidence:

[Financial Planning Student Exit Surveys \(Adobe Acrobat Document\)](#)

**These Findings are associated with the following Actions:**

PSLO 3 - Indirect Measure

(Continuous Improvement  
Action; 2017-18  
Assessment Cycle)

▼ **Measure:** Financial Planning Capstone Project  
*Program level ; Direct - Student Artifact*

Details/Description:	The students will complete a semester long capstone project in FSMA 7123 Personal Financial Planning Capstone.
Acceptable Target:	60% of students will achieve "good" or higher for this outcome on the BBA in Financial Planning Rubric.
Ideal Target:	70% of students will achieve "good" or higher for this outcome on the BBA in Financial Planning Rubric.
Implementation Plan (timeline):	The capstone project will be implemented in academic year 2017-2018 and will be administered every year.
Key/Responsible Personnel:	FSMA 7123 Instructor Danielle Green Mark Bloxsom

Supporting Attachments:


[BBA Financial Planning Capstone Project \(Adobe Acrobat Document\)](#)

Findings for Financial Planning Capstone Project

Summary of Findings:	94% of students received "good" or higher on the Financial Planning Capstone Rubric
Results :	Acceptable Target Achievement: Exceeded; Ideal Target Achievement: Exceeded
Reflections/Notes:	



Substantiating Evidence:

 Financial Planning, BBA Capstone Rubric Results (Adobe Acrobat Document)

**These Findings are associated with the following Actions:**

Capstone Project Action Plan  
(Continuous Improvement Action; 2017-18 Assessment Cycle)

**Outcome : 4. Incorporate software, technology, and information systems into personal finance.**

▼ **Measure:** Exit Survey  
*Program level ; Indirect - Survey*


Details/Description:	All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.
Acceptable Target:	70% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Ideal Target:	80% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Implementation Plan (timeline):	The BBA in Financial Planning Exit Survey will be administered to all graduating students through Blackboard starting in academic year 2017-2018.

This survey will be administered every year for graduating students.

Key/Responsible  
Personnel:

Jeff Lokey  
Danielle Green  
Mark Bloxsom  
BBA in Financial Planning Curriculum Coordinator

Supporting Attachments:

 BBA Financial Planning Exit Survey (Adobe Acrobat Document)


### Findings for Exit Survey

Summary of Findings: 67% of students indicated “agree” or higher in achieving each of the program student learning outcomes

Results : Acceptable Target Achievement: Not Met;  
Ideal Target Achievement: Approaching

Reflections/Notes:

Substantiating Evidence:

 Financial Planning Student Exit Surveys (Adobe Acrobat Document)


**These Findings are associated  
with the following Actions:**

PSLO 4 - Indirect  
Measure  
(Continuous Improvement  
Action; 2017-18  
Assessment Cycle)

▼ **Measure:** Financial Planning Internship  
*Program level ; Direct - Other*

Details/Description:	All Financial Planning Students will complete the Financial Planning Internship. This outcome will be evaluated by the student's employer as part of the final review paperwork.
Acceptable Target:	70% of students will achieve "above average" or higher for this outcome on the employer final evaluation.
Ideal Target:	80% of students will achieve "above average" or higher for this outcome on the employer final evaluation.
Implementation Plan (timeline):	The employer final evaluation will be administered in FSMA 7112 each semester starting in Fall 2017-2018.
Key/Responsible Personnel:	Danielle Green Mark Bloxson Financial Planning Internship Coordinator


Supporting Attachments:

 BBA Financial Planning Internship Evaluation Form (Adobe Acrobat Document)

Findings for Financial Planning Internship

Summary of Findings:	100% of students achieved above average or higher on the employer final evaluation.
Results :	Acceptable Target Achievement: Exceeded; Ideal Target Achievement: Exceeded
Reflections/Notes:	Six of the eight students used the wrong internship evaluation form.

Substantiating Evidence:

 Financial Planning, BBA Spring 2018 Internship Evaluation Form (Adobe Acrobat Document)

**These Findings are associated with the following Actions:**


Internship Action Plan  
(Continuous Improvement  
Action; 2017-18 Assessment  
Cycle)

**Outcome : 5. Examine comprehensive personal finance issues and communicate findings and solutions.(WO)**

▼ **Measure:** Exit Survey  
*Program level ; Indirect - Survey*

Details/Description:	All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.
Acceptable Target:	70% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Ideal Target:	80% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Implementation Plan (timeline):	The BBA in Financial Planning Exit Survey will be administered to all graduating students through Blackboard starting in academic year 2017-2018. This survey will be administered every year for graduating students.
Key/Responsible Personnel:	Jeff Lokey Danielle Green Mark Bloxsom BBA in Financial Planning Curriculum Coordinator

Supporting Attachments:

 BBA Financial Planning Exit Survey (Adobe Acrobat Document)


## Findings for Exit Survey

Summary of Findings: 67% of students indicated "agree" or higher in achieving each of the program student learning outcomes

Results : Acceptable Target Achievement: Not Met;  
Ideal Target Achievement: Approaching

Reflections/Notes:

Substantiating Evidence:

 Financial Planning Student Exit Surveys (Adobe Acrobat Document)

**These Findings are associated with the following Actions:**

PSLO 5 - Indirect  
Measure  
(Continuous Improvement  
Action; 2017-18  
Assessment Cycle)

▼ **Measure:** Financial Planning Capstone Project  
*Program level; Direct - Student Artifact*

Details/Description: The students will complete a semester long capstone project in FSMA 7123 Personal Financial Planning Capstone.

Acceptable Target: 60% of students will achieve "good" or higher for this outcome on the BBA in Financial Planning Rubric.

Ideal Target: 70% of students will achieve "good" or higher for this outcome on the BBA in Financial Planning Rubric.

Implementation Plan  
(timeline):

The capstone project will be implemented in academic year 2017-2018 and will be administered every year.

Key/Responsible  
Personnel:

FSMA 7123 Instructor  
Danielle Green  
Mark Bloxsom

Supporting Attachments:

 BBA Financial Planning Capstone Project (Adobe Acrobat Document)

#### Findings for Financial Planning Capstone Project

Summary of Findings:


94% of students received "good" or higher on the Financial Planning Capstone Rubric

Results :

Acceptable Target Achievement: Exceeded;  
Ideal Target Achievement: Exceeded

Reflections/Notes:

Substantiating Evidence:

 Financial Planning, BBA Capstone Rubric Results (Adobe Acrobat Document)

**These Findings are associated  
with the following Actions:**


Capstone Project Action  
Plan  
(Continuous Improvement  
Action; 2017-18 Assessment  
Cycle)

**Outcome : 6. Examine the personal finance environment in relation to the current financial, legal, economic, and social environments.**

▼ **Measure:** Exit Survey  
*Program level ; Indirect - Survey*

Details/Description:	All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.
Acceptable Target:	70% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Ideal Target:	80% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Implementation Plan (timeline):	The BBA in Financial Planning Exit Survey will be administered to all graduating students through Blackboard starting in academic year 2017-2018. This survey will be administered every year for graduating students.
Key/Responsible Personnel:	Jeff Lokey Danielle Green Mark Bloxsom BBA in Financial Planning Curriculum Coordinator


Supporting Attachments:

 BBA Financial Planning Exit Survey (Adobe Acrobat Document)

Findings for Exit Survey

Summary of Findings:	100% of students indicated "agree" or higher in achieving each of the program student learning outcomes
Results :	Acceptable Target Achievement: Exceeded; Ideal Target Achievement: Exceeded
Reflections/Notes:	

Substantiating Evidence:

 Financial Planning Student Exit Surveys (Adobe Acrobat Document)


**These Findings are associated with the following Actions:**

PSLO 6 - Indirect Measure  
(Continuous Improvement Action; 2017-18 Assessment Cycle)

▼ **Measure:** Financial Planning Capstone Project  
*Program level ; Direct - Student Artifact*

Details/Description:	The students will complete a semester long capstone project in FSMA 7123 Personal Financial Planning Capstone.
Acceptable Target:	60% of students will achieve "good" or higher for this outcome on the BBA in Financial Planning Rubric.
Ideal Target:	70% of students will achieve "good" or higher for this outcome on the BBA in Financial Planning Rubric.
Implementation Plan (timeline):	The capstone project will be implemented in academic year 2017-2018 and will be administered every year.
Key/Responsible Personnel:	FSMA 7123 Instructor Danielle Green Mark Bloxsom

Supporting Attachments:

 BBA Financial Planning Capstone Project (Adobe Acrobat Document)




## Findings for Financial Planning Capstone Project

Summary of Findings: 94% of students received "good" or higher on the Financial Planning Capstone Rubric

Results : Acceptable Target Achievement: Exceeded;  
Ideal Target Achievement: Exceeded

Reflections/Notes:

Substantiating Evidence:

 Financial Planning, BBA Capstone Rubric Results (Adobe Acrobat Document)

**These Findings are associated with the following Actions:**

Capstone Project Action Plan  
(Continuous Improvement Action; 2017-18 Assessment Cycle)

**Outcome : 7. Analyze the role of ethics, government regulations, and legalities in personal financial planning processes.**

▼ **Measure:** End of Program Exam (Essay)  
*Program level ; Direct - Exam*

Details/Description: The students will take their End of Program Exam in

FSMA 7123 Personal Financial Planning Capstone.

Acceptable Target:

50% of students will "Meet" or "Exceed" the requirement on essay questions based on the BBA in Financial Planning Rubric.

Ideal Target:

70% of students will "Meet" or "Exceed" the requirement on essay questions based on the BBA in Financial Planning Rubric.

Implementation Plan (timeline):

The End of Program Exam will be administered every year starting in 2017-2018.

Key/Responsible Personnel:

FSMA 7123 Instructor  
Danielle Green  
Mark Bloxsom

Supporting Attachments:

[BBA Financial Planning Essay Questions \(Adobe Acrobat Document\)](#)

#### Findings for End of Program Exam (Essay)

Summary of Findings:

75% of students meet/exceed the standard on the essay question.

Results :

Acceptable Target Achievement:  
Exceeded; Ideal Target Achievement:  
Exceeded

Reflections/Notes:

Substantiating Evidence:

[Financial Planning, BBA End of Program Essay Results \(Adobe Acrobat Document\)](#)


**These Findings are associated with the following Actions:**

End of Program Exam  
Action Plan  
(Continuous Improvement  
Action; 2017-18 Assessment  
Cycle)

▼ **Measure:** Exit Survey  
*Program level ; Indirect - Survey*


Details/Description:	All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.
Acceptable Target:	70% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Ideal Target:	80% of all graduating students will indicate "Agree" or higher in achieving each of the program student learning outcomes.
Implementation Plan (timeline):	The BBA in Financial Planning Exit Survey will be administered to all graduating students through Blackboard starting in academic year 2017-2018. This survey will be administered every year for graduating students.
Key/Responsible Personnel:	Jeff Lokey Danielle Green Mark Bloxson BBA in Financial Planning Curriculum Coordinator

Supporting Attachments:

 BBA Financial Planning Exit Survey (Adobe Acrobat Document)

Findings for Exit Survey

Summary of Findings:	66% of students indicated "agree" or higher in achieving each of the program student learning outcomes
Results :	Acceptable Target Achievement: Not Met; Ideal Target Achievement: Approaching
Reflections/Notes:	
Substantiating Evidence:	

 Financial Planning Student Exit Surveys (Adobe Acrobat Document)

**These Findings are associated  
with the following Actions:**

PSLO 7 - Indirect  
Measure  
(Continuous Improvement  
Action; 2017-18  
Assessment Cycle)

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