Finding per Measure

Financial Planning Program (BBA) Outcome Set

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

<table>
<thead>
<tr>
<th>Details/Description:</th>
<th>All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acceptable Target:</td>
<td>70% of all graduating students will indicate &quot;Agree&quot; or higher in achieving each of the program student learning outcomes.</td>
</tr>
<tr>
<td>Ideal Target:</td>
<td>80% of all graduating students will indicate &quot;Agree&quot; or higher in achieving each of the program student learning outcomes.</td>
</tr>
<tr>
<td>Implementation Plan (timeline):</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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**

<table>
<thead>
<tr>
<th>Summary of Findings:</th>
<th>100% of students indicated “agree” or higher in achieving each of the program student learning outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Results:</td>
<td>Acceptable Target Achievement: Exceeded; Ideal Target Achievement: Exceeded</td>
</tr>
<tr>
<td>Reflections/Notes:</td>
<td></td>
</tr>
<tr>
<td>Substantiating Evidence:</td>
<td></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Details/Description:</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acceptable Target:</td>
<td>70% of students will achieve &quot;above average&quot; or higher for this outcome on the employer final evaluation.</td>
</tr>
<tr>
<td>Ideal Target:</td>
<td>80% of students will achieve &quot;above average&quot; or higher for this outcome on the employer final evaluation.</td>
</tr>
<tr>
<td>Implementation Plan (timeline):</td>
<td>The employer final evaluation will be administered in FSMA 7112 each semester starting in Fall 2017-2018.</td>
</tr>
</tbody>
</table>
| 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

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

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
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 3 - Indirect Measure
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

<table>
<thead>
<tr>
<th>Details/Description:</th>
<th>All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.</th>
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<tr>
<td>Acceptable Target:</td>
<td>70% of all graduating students will indicate &quot;Agree&quot; or higher in achieving each of the program student learning outcomes.</td>
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<tr>
<td>Ideal Target:</td>
<td>80% of all graduating students will indicate &quot;Agree&quot; or higher in achieving each of the program student learning outcomes.</td>
</tr>
<tr>
<td>Implementation Plan (timeline):</td>
<td>The BBA in Financial Planning Exit Survey will be administered to all graduating students through Blackboard starting in academic year 2017-2018.</td>
</tr>
</tbody>
</table>
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 Bloxsom
  Financial Planning Internship Coordinator

**Supporting Attachments:**
- [BBA Financial Planning Internship Evaluation Form (Adobe Acrobat Document)](#)
- [Findings for Financial Planning Internship](#)
- [Financial Planning, BBA Spring 2018 Internship Evaluation Form (Adobe Acrobat Document)](#)

**Findings for Financial Planning Internship**

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

**Substantiating Evidence:**

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

<table>
<thead>
<tr>
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<th>All students will take the BBA in Financial Planning Exit Survey administered through Blackboard.</th>
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<tbody>
<tr>
<td>Acceptable Target:</td>
<td>70% of all graduating students will indicate “Agree” or higher in achieving each of the program student learning outcomes.</td>
</tr>
<tr>
<td>Ideal Target:</td>
<td>80% of all graduating students will indicate &quot;Agree&quot; or higher in achieving each of the program student learning outcomes.</td>
</tr>
<tr>
<td>Implementation Plan (timeline):</td>
<td>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.</td>
</tr>
</tbody>
</table>
| Key/Responsible Personnel: | Jeff Lokey  
Danielle Green  
Mark Bloxsom  
BBA in Financial Planning Curriculum Coordinator |

Supporting Attachments:

Findings for Exit Survey

<table>
<thead>
<tr>
<th>Summary of Findings:</th>
<th>100% of students indicated “agree” or higher in achieving each of the program student learning outcomes</th>
</tr>
</thead>
</table>
| Results:             | Acceptable Target Achievement: Exceeded;  
Ideal Target Achievement: Exceeded |
| Reflections/Notes:   | |

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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)

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


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 Bloxsom
  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:**

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These Findings are associated with the following Actions:

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