



Student Learning Assessment Report, Academic

Report Year

2022-2023

Program

Financial Planning Concentration

Department Head

Joseph McCollum

Submitted By

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Previously Submitted Reports

2021-2022 Financial Planning Concentration

Mission

The finance major focuses on the nature and practice of financial-decision making. This major provides you with skills and knowledge you need to identify financial problems, analyze their impact, and design innovative solutions which will withstand critical examination. The financial planning concentration is intended for students interested in personal financial planning for individuals or families.

Assessment

1. Major/Program Student Learning Outcomes

Student will be able to...

Make sound decisions relating to a personal financial plan.

2. Phase

Check all that apply

- Planning/ determining procedure
- Planning/ Redesigning based on past assessment
- Collecting/ analyzing assessment data
- Discussing/ using result
- Determining if Changes had an Impact on Student Learning
- Objective not assessed this year

3. Assessment Procedures (Planning/ determining)

Method: (ex. tests, presentations, research paper, describe the assessment course and student sample when it is applicable, etc.)

assignments, tests and projects.

When does assessment occur?

Spring Semester

How often does assessment occur?

once per year

Criteria (How do you know students are achieving learning outcome?)

Exceed- A+ to A-
Met - B+ to B-
Does not Meet C+ or below

4. Assessment Results (Collecting/ analyzing, please identify the sample size and course number when appropriate)

The sample size is less than 3, so we can not report the details in the assessment.

Learning Outcome Met? (Based on Criteria)

Insufficient data

5. Use of Results (Discussing/ using results)

N/A

Assessment

1. Major/Program Student Learning Outcomes

Student will be able to...

Understand the importance of insurance and the various types of insurance plans available to individuals.

2. Phase

Check all that apply

- Planning/ determining procedure
- Planning/ Redesigning based on past assessment
- Collecting/ analyzing assessment data
- Discussing/ using result
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- Objective not assessed this year

3. Assessment Procedures (Planning/ determining)

Method: (ex. tests, presentations, research paper, describe the assessment course and student sample when it is applicable, etc.)

assignments, tests and projects.

When does assessment occur?

Spring Semester

How often does assessment occur?

Once per year

Criteria (How do you know students are achieving learning outcome?)

Exceed 9-10
Met 7 -8
Does not Meet 6 or less

4. Assessment Results (Collecting/ analyzing, please identify the sample size and course number when appropriate)

The sample size is less than 3, so we can not report the details in the assessment.

Learning Outcome Met? (Based on Criteria)

Insufficient data

5. Use of Results (Discussing/ using results)

N/A

Assessment

1. Major/Program Student Learning Outcomes

Student will be able to...

Apply and integrate the content found within the Financial Planning curriculum in the formulation of a financial plan.

2. Phase

Check all that apply

- Planning/ determining procedure
- Planning/ Redesigning based on past assessment
- Collecting/ analyzing assessment data
- Discussing/ using result
- Determining if Changes had an Impact on Student Learning
- Objective not assessed this year

3. Assessment Procedures (Planning/ determining)

Method: (ex. tests, presentations, research paper, describe the assessment course and student sample when it is applicable, etc.)

assignments, tests and projects.

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Spring Semester

How often does assessment occur?

Once per year

Criteria (How do you know students are achieving learning outcome?)

Exceed- A+ to A-
Met - B+ to B-
Does not Meet C+ or below

4. Assessment Results (Collecting/ analyzing, please identify the sample size and course number when appropriate)

The sample size is less than 3, so we can not report the details in the assessment.

Learning Outcome Met? (Based on Criteria)

Insufficient data

5. Use of Results (Discussing/ using results)

N/A

Assessment

1. Major/Program Student Learning Outcomes

Student will be able to...

Effectively communicate the financial plan, both orally and in writing, including information based on research and client interaction.

2. Phase

Check all that apply

- Planning/ determining procedure
- Planning/ Redesigning based on past assessment
- Collecting/ analyzing assessment data
- Discussing/ using result
- Determining if Changes had an Impact on Student Learning
- Objective not assessed this year

3. Assessment Procedures (Planning/ determining)

Method: (ex. tests, presentations, research paper, describe the assessment course and student sample when it is applicable, etc.)

assignments, tests and projects.

When does assessment occur?

Spring Semester

How often does assessment occur?

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4. Assessment Results (Collecting/ analyzing, please identify the sample size and course number when appropriate)

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Learning Outcome Met? (Based on Criteria)

Insufficient data



5. Use of Results (Discussing/ using results)

N/A

Assessment

1. Major/Program Student Learning Outcomes

Student will be able to...

Demonstrate knowledge of the concepts, principles and rules of taxation of individuals and effectively communicate tax research findings.

2. Phase

Check all that apply

- Planning/ determining procedure
- Planning/ Redesigning based on past assessment
- Collecting/ analyzing assessment data
- Discussing/ using result
- Determining if Changes had an Impact on Student Learning
- Objective not assessed this year

3. Assessment Procedures (Planning/ determining)

Method: (ex. tests, presentations, research paper, describe the assessment course and student sample when it is applicable, etc.)

assignments, tests and projects.

When does assessment occur?

Spring Semester

How often does assessment occur?

Once per year

Criteria (How do you know students are achieving learning outcome?)

Exceed- A+ to A-
Met - B+ to B-
Does not Meet C+ or below

4. Assessment Results (Collecting/ analyzing, please identify the sample size and course number when appropriate)

The sample size is less than 3, so we can not report the details in the assessment. After summarizing the data collected from faculty, there remains insufficient data.

Learning Outcome Met? (Based on Criteria)

Insufficient data



5. Use of Results (Discussing/ using results)

N/A

Package History

Date	User	Action
10/1/2023 12:27:29 PM	Robert Tong	Submitted 'Student Learning Assessment Report'
10/1/2023 12:28:03 PM	School of Business - Asst. Dean	Received
10/1/2023 12:28:03 PM	Provost and Senior Vice President	Received
10/1/2023 12:28:03 PM	School of Business - Dean	Received
10/1/2023 12:28:04 PM	Joseph McCollum	Received
10/1/2023 12:28:04 PM	Institutional Effectiveness	Received
10/1/2023 12:28:05 PM	Joseph McCollum	Received
10/1/2023 12:28:05 PM	School of Science - Asst. Dean	Received
10/1/2023 12:45:53 PM	Margaret Madden	Decision Approved on step 'Provost and Senior Vice President'