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| **Assurance of Student Learning Report**  **2022-2023** | | |
| *Gordon Ford College of Business* | | *Department of Finance* |
| *Financial Planning Certificate 200* | | |
| *Indudeep Chhachhi* | | |
| ***Is this an online program***?  Yes  No | Please make sure the Program Learning Outcomes listed match those in CourseLeaf . Indicate verification here  Yes, they match! (If they don’t match, explain on this page under **Assessment Cycle)** | |

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| ***Use this page to list learning outcomes, measurements, and summarize results for your program. Detailed information must be completed in the subsequent pages. Add more Outcomes as needed.*** | | | |
| **Program Student Learning Outcome 1:**  Financial Planning Certificate students will be able to write a satisfactory professional document | | | |
| **Instrument 1** | **Direct:**  Essay assignment from FIN 444, Retirement Planning | | |
| **Based on your results, check whether the program met the goal Student Learning Outcome 1.** | | **Met** | **Not Met** |
| **Program Student Learning Outcome 2:**  Financial Planning Certificate students will demonstrate knowledge of topics in the financial advising profession | | | |
| **Instrument 1** | **Direct:**  Essay assignment from FIN 444, Retirement Planning | | |
| **Based on your results, check whether the program met the goal Student Learning Outcome 2.** | | **Met** | **Not Met** |
| **Assessment Cycle Plan:** | | | |
| Both students showed excellent writing skills in their essays.  Both students showed satisfactory knowledge of retirement planning.  The learning outcomes in this form are slightly different from the ones in Courseleaf due to changes in the curriculum. | | | |

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| **Program Student Learning Outcome 1** | | | | | |
| **Program Student Learning Outcome** | Financial Planning Certificate students will be able to write a satisfactory professional document | | | | |
| **Measurement Instrument 1** | **Direct:**  Essay assignment from FIN 444, Retirement Planning | | | | |
| **Criteria for Student Success** | Students who earn the certificate in financial planning should be aware of the need for writing a professional document. Graduates are expected to earn 3 or higher on writing skills essays using a 5-point scale rubric. | | | | |
| **Program Success Target for this Measurement** | | 90% earn 3 or higher | **Percent of Program Achieving Target** | 100% earned 3 or higher | |
| **Methods** | 19 essays were evaluated by three different assessors from the finance department faculty. The essays were anonymized, and the results are shown in the table below.   |  |  |  | | --- | --- | --- | | Criterion | Overall | N | | Content | 5 | 2 | | Language/Grammar | 5 | 2 | | Format | 5 | 2 | | Overall Written Communication | 5 |  | | | | | |
| **Based on your results, circle or highlight whether the program met the goal Student Learning Outcome 2.** | | | | **Met** | **Not Met** |
| **Results, Conclusion, and Plans for Next Assessment Cycle (Describe what worked, what didn’t, and plan going forward)** | | | | | |
| **Results**:  Yes, our students showed competency in understating the written communication issues presented in the assignment.  **Conclusions**:  We changed the assessment artifact since the assignment in the FIN 450 are group assignments.  **Plans for Next Assessment Cycle**:  With the change of curriculum, we are evaluating all of our assessments and create new ones for the next academic year and beyond. | | | | | |

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| **Program Student Learning Outcome 2** | | | | |
| **Program Student Learning Outcome** | Financial Planning Certificate students will demonstrate knowledge of topics in the financial advising profession. | | | |
| **Measurement Instrument 1** | **Direct:**  Essay assignment from FIN 444, Retirement Planning | | | |
| **Criteria for Student Success** | 80% of graduating seniors should be able to score 70% or higher on questions related to retirement planning on the PFP senior assessment exam. | | | |
| **Program Success Target for this Measurement** | | 80% | **Percent of Program Achieving Target** | 100% |
| **Methods** | Both students scored 93% and demonstrated satisfactory knowledge of financial planning.   |  |  |  |  | | --- | --- | --- | --- | |  | *Overall Retirement Results* | |  | |  |  |  |  | |  | Mean | 93% |  | |  | Median | 93% |  | |  | Mode | 93% |  | |  | Minimum | 93% |  | |  | Maximum | 93% |  | |  | Count | 2 |  | | | | |
| **Results, Conclusion, and Plans for Next Assessment Cycle (Describe what worked, what didn’t, and plan going forward)** | | | | |
| **Results**: Are the results what was expected or not? What stood out in the assessment cycle? Explain  Yes, our students showed excellent competency in demonstrating knowledge of retirement planning.    **Conclusions**:  We changed the assessment artifact since the assignment in the FIN 450 are group assignments.  **Plans for Next Assessment Cycle**:  With the change of curriculum, we are evaluating all of our assessments and create new ones for the next academic year and beyond. | | | | |

**\*\*\* Please include Curriculum Map (below/next page) as part of this document**