

BA CONSUMER AND FAMILY FINANCIAL SERVICES: ANNUAL ASSESSMENT PLAN & FINDINGS 2021-2022 ACADEMIC YEAR

2021–2022 CU	IRRICULUM MAP						
	PLO 1	PLO 2	PLO 3	PLO 4	PLO 5	PLO 6	PLO 7
	Recommend appropriate financial information to individual consumers.	Assess legal concepts and their application to the individual investor.	Evaluate personal financial practices to achieve the most efficient use of the client's financial resources.	Assess the role of financial advisor in the provision of business services to clients.	Construct both short range and long range financial plans for a client.	Examine the role of life, health, property, and casualty insurance in business and personal financial planning.	Evaluate various types of investments in terms of their risks and potential returns
BUS 215: Personal Financial Management	ı	I	I	ı	I	I	I
BUS 311: Business Law I		ı					
FIN 301: Ethics for the Finance Professional	R	R		R			
ECO 203: Principles of Macroeconomics			ı				R
ACC 205: Principles of Accounting			I			I	
BUS 308: Statistics for Managers	R				R		R
ECO 316: Financial Institutions & Markets	R		R		R	I	R
BUS 330:	R			R	R		

$Of fice\ of\ Assessment\ and\ Curricular\ Affairs$

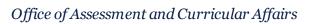


Principles of Marketing							
BUS 323: Risk Management & Insurance		R	R	R	R	R	R
BUS 342: Financial Planning & Practice	R	R	M	M	R	R	R
BUS 401: Principles of Finance	R				R		R
BUS 405: Principles of Investments	R		R	R	R		R
PFP 457: Retirement & Estate Planning	R	R	R	R	R	R	R
ACC 401: Federal Income Taxes I	R	R		R			
BUS 458: Consumer & Family Finance Capstone	М	М	М	М	М	М	М

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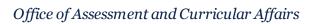


ANNUAL ASSESSMENT PLAN FINDINGS PLO 1 - Recommend appropriate financial information to individual consumers. **TOTAL NUMBER** TOTAL ASSESSMENT **MEASURE** ACCEPTABLE TARGET **ASSESSMENT** OF STUDENT **NUMBER OF RESULTS: RESULTS: RECORDS** STUDENT PERCENTAGE OF 1. EXCEEDS THE RECORDS MEETING **STUDENT ACCEPTABLE ACCEPTABLE OBSERVED RECORDS TARGET TARGET** MEETING 2. MEETS THE **ACCEPTABLE ACCEPTABLE TARGET TARGET** 3. DOES NOT MEET THE ACCEPTABLE **TARGET** 4. INSUFFICIENT **DATA**





Direct Measure 1:	90% of BA Consumer and Family Financial	8	9	8 out of 9 (88.89%)	1. EXCEEDS THE
CPC Comprehensive	Services students must score 400 or higher on			BA Consumer and	ACCEPTABLE
Exam-Score	the CPC comprehensive exam.			Family Financial	TARGET
				Services students	
				from July 1, 2021	
				to June 30, 2022	
				scored 400 or	
				higher on the CPC	
				comprehensive	
				exam.	
Direct Measure 2: CPC	BA Consumer and Family Financial Services	UAGC: N=9,	UAGC: N=9,	On average, BA	2. MEETS THE
Comprehensive Exam –	students, on average, will score at or above	Mean=711,	Mean=711,	Consumer and	ACCEPTABLE
Marketing Section	the average in the Peregrine Academic	Traditional:	Traditional:	Family Financial	TARGET
	Services (PAS) Online Campus and Traditional	42810/606:	42810/606:	Services students	
	Campus Aggregate Pools related to the	Online:	Online:	scored above the	
	Marketing section of the CPC comprehensive	38310/622	38310/622	average of the	
	exam when compared to other competitive			Peregrine	
	programs.			Academic Services	
				Online Aggregate	
				Pool, and above	
				the average of the	
				Traditional	
				Aggregate Pool on	
				the Marketing	
				section of the	
				Common	
				Professional	
				Component	
				comprehensive	
				exam.	

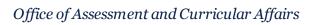




Direct Measure 2: BUS432 Final Paper	70% of Bachelor of Arts in Consumer and Family Financial Services students must receive a proficient, or distinguished evaluation on relevant content criteria mapped to this PLO.	12	15	12 out of 15 (80.00%) of records evaluated indicate proficient or distinguished performance on this key assignment's content criteria mapped to this PLO at the Reinforced level.	1. EXCEEDS THE ACCEPTABLE TARGET
Indirect Measure 1: End of Program Survey PLO1	70% or more of students exiting the program will express satisfaction on the End of Program Survey by indicating either "Agree" or "Strongly Agree." The item to be used will be: • I effectively recommended appropriate financial information to individual consumers.	8	8	100.00% of BA Consumer and Family Financial Services students upon completion of the program during the 2020-21 assessment cycle indicated that they agreed or strongly agreed that they effectively recommended appropriate financial information to individual consumers.	1. EXCEEDS THE ACCEPTABLE TARGET

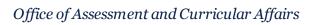


PLO 2 - Assess legal co	PLO 2 - Assess legal concepts and their application to the individual investor.						
MEASURE	ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS OBSERVED	ASSESSMENT RESULTS: PERCENTAGE OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	ASSESSMENT RESULTS: 1. EXCEEDS THE ACCEPTABLE TARGET 2. MEETS THE ACCEPTABLE TARGET 3. DOES NOT MEET THE ACCEPTABLE TARGET 4. INSUFFICIENT DATA		
Direct Measure 1: CPC Comprehensive Exam-Score	90% of BA Consumer and Family Financial Services students must score 400 or higher on the CPC comprehensive exam.	8	9	8 out of 9 (88.89%) BA Consumer and Family Financial Services students from July 1, 2021 to June 30, 2022 scored 400 or higher on the CPC comprehensive exam.	1. EXCEEDS THE ACCEPTABLE TARGET		
Direct Measure 2: CPC Comprehensive	BA Consumer and Family Financial Services students, on average, will score at or above	UAGC : N=9, Mean=689,	UAGC : N=9, Mean=689,	On average BA Consumer and	2. MEETS THE ACCEPTABLE		





Exam- Legal	the average in the Peregrine Academic	Traditional:	Traditional:	Family Financial	TARGET
Environment of	Services (PAS) Online Campus and Traditional	41970/586:	41970/586:	Services students	
Business Section	Campus Aggregate Pools related to the Legal	Online:	Online:	scored above the	
	Environment of Business section of the CPC	41580/622	41580/622	average of the	
	comprehensive exam when compared to			Peregrine	
	other competitive programs.			Academic Services	
				Online Aggregate	
				Pool, and above	
				the average of the	
				Traditional	
				Aggregate Pool on	
				the Legal	
				Environment of	
				Business section of	
				the Common	
				Professional	
				Component	
				comprehensive	
				exam.	
Direct Measure 2:	70% of Bachelor of Arts in Consumer and	19	24	19 out of 24	1. EXCEEDS THE
BUS323 Final Paper	Family Financial Services students must			(79.17%) of	ACCEPTABLE
	receive a proficient, or distinguished			records evaluated	TARGET
	evaluation on relevant content criteria			indicate proficient	
	mapped to this PLO.			or distinguished	
				performance on	
				this key	
				assignment's	
				content criteria	
				mapped to this	
				PLO at the	
				Reinforced level.	

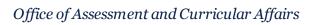




Indirect Measure 1:	70% or more of students exiting the program	7	8	87.50% of BA	1. EXCEEDS THE
End of Program Survey	will express satisfaction on the End of			Consumer and	ACCEPTABLE
PLO2	Program Survey by indicating either "Agree"			Family Financial	TARGET
	or "Strongly Agree." The item to be used will			Services students	
	be:			upon completion	
	I effectively assessed legal concepts and			of the program	
	their application to the individual investor.			during the 2020-21	
				assessment cycle	
				indicated that they	
				agreed or strongly	
				agreed that they	
				effectively	
				assessed legal	
				concepts and their	
				application to the	
				individual investor.	

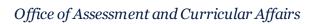


PLO 3 - Evaluate personal financial practices to achieve the most efficient use of the client's financial resources.					
MEASURE	ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS OBSERVED	ASSESSMENT RESULTS: PERCENTAGE OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	ASSESSMENT RESULTS: 1. EXCEEDS THE ACCEPTABLE TARGET 2. MEETS THE ACCEPTABLE TARGET 3. DOES NOT MEE THE ACCEPTABLE TARGET 4. INSUFFICIENT DATA
Direct Measure 1: CPC Comprehensive Exam-Score	90% of BA Consumer and Family Financial Services students must score 400 or higher on the CPC comprehensive exam.	8	9	8 out of 9 (88.89%) BA Consumer and Family Financial Services students from July 1, 2021 to June 30, 2022 scored 400 or higher on the CPC comprehensive exam.	1. EXCEEDS THE ACCEPTABLE TARGET
Direct Measure 2: CPC Comprehensive Exam —	BA Consumer and Family Financial Services students, on average, will score at or above	UAGC: N=9, Mean=700,	UAGC : N=9, Mean=700,	On average, BA Consumer and	2. MEETS THE ACCEPTABLE





Business Ethics Section	the average in the Peregrine Academic	Traditional:	Traditional:	Family Financial	TARGET
Business Ethies section	Services (PAS) Online Campus and Traditional	40950/567:	40950/567:	Services students	.,
	Campus Aggregate Pools related to the	Online:	Online:	scored above the	
	Business Ethics section of the CPC	43560/603	43560/603	average of the	
	comprehensive exam when compared to			Peregrine	
	other competitive programs.			Academic Services	
				Online Aggregate	
				Pool, and above	
				the average of the	
				Traditional	
				Aggregate Pool on	
				the Business Ethics	
				section of the	
				Common	
				Professional	
				Component	
				comprehensive	
				exam.	
Direct Measure 3:	70% of Bachelor of Arts in Consumer and	28	28	28 out of 28	1. EXCEEDS THE
ECO316 Final Paper	Family Financial Services students must			(100.00%) of	ACCEPTABLE
	receive a proficient, or distinguished			records evaluated	TARGET
	evaluation on relevant content criteria			indicate proficient	
	mapped to this PLO.			or distinguished	
				performance on	
				this key	
				assignment's	
				content criteria	
				mapped to this	
				PLO at the	
				Reinforced level.	
Indirect Measure 1:	70% or more of students exiting the program	7	8	87.50% of BA	1. EXCEEDS THE

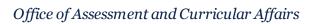




End of Program Survey	will express satisfaction on the End of	Consumer and	ACCEPTABLE
PLO3	Program Survey by indicating either "Agree"	Family Financial	TARGET
	or "Strongly Agree." The item to be used will	Services students	
	be:	upon completion	
	I effectively evaluated personal financial	of the program	
	practices to achieve the most efficient use of	during the 2020-21	
	the client's financial resources.	assessment cycle	
		indicated that they	
		agreed or strongly	
		agreed that they	
		effectively	
		evaluated personal	
		financial practices	
		to achieve the	
		most efficient use	
		of the client's	
		financial	
		resources.	

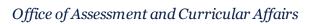


PLO 4 - Assess the role	of financial advisor in the provision of busi	ness services to c	lients.		
MEASURE	ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS OBSERVED	ASSESSMENT RESULTS: PERCENTAGE OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	1. EXCEEDS THE ACCEPTABLE TARGET 2. MEETS THE ACCEPTABLE TARGET 3. DOES NOT MEET THE ACCEPTABLE TARGET 4. INSUFFICIENT DATA
Direct Measure 1: CPC Comprehensive Exam-Score	90% of BA Consumer and Family Financial Services students must score 400 or higher on the CPC comprehensive exam.	8	9	8 out of 9 (88.89%) BA Consumer and Family Financial Services students from July 1, 2021 to June 30, 2022 scored 400 or higher on the CPC comprehensive exam.	1. EXCEEDS THE ACCEPTABLE TARGET
Direct Measure 2: CPC Comprehensive Exam – Business Finance Section	BA Consumer and Family Financial Services students, on average, will score at or above the average in the Peregrine Academic Services (PAS) Online Campus and Traditional Campus Aggregate Pools related to the Business Finance section of the CPC	UAGC: N=9, Mean=644, Traditional: 42510/526: Online:	UAGC: N=9, Mean=644, Traditional: 42510/526: Online:	On average, BA Consumer and Family Financial Services students scored above the average of the	2. MEETS THE ACCEPTABLE TARGET





	comprehensive exam when compared to other competitive programs.	38160/532	38160/532	Peregrine Academic Services	
				Online Aggregate Pool, and above	
				the average of the	
				Traditional	
				Aggregate Pool on	
				the Business	
				Finance section of	
				the Common	
				Professional	
				Component comprehensive	
				exam.	
		_			
Direct Measure 3:	70% of BA Consumer and Family Financial	12	15	12 out of 15	1. EXCEEDS THE ACCEPTABLE
BUS342, Final Assignment	Services students must receive a proficient, or distinguished evaluation on relevant content			(80.00%) of records evaluated	TARGET
Assignment	criteria mapped to this PLO.			indicate proficient	IARGEI
				or distinguished	
				performance on	
				this key	
				assignment's	
				content criteria	
				mapped to this	
				PLO at the	
				Mastered level.	
Indirect Measure 1:	70% or more of students exiting the program	8	8	100.00% of BA	1. EXCEEDS THE
End of Program Survey	will express satisfaction on the End of			Consumer and	ACCEPTABLE
PLO4	Program Survey by indicating either "Agree"			Family Financial	TARGET
	or "Strongly Agree." The item to be used will			Services students	
	be:			upon completion	

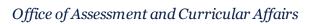




I effectively assessed the role of financial		of the program	
advisor in the provision of business services		during the 2020-21	
to clients.		assessmentcycle	
		indicated that they	
		agreed or strongly	
		agreed that they	
		effectively	
		assessed the role	
		of financial advisor	
		in the provision of	
		business services	
		to clients.	



PLO 5 - Construct both	short range and long range financial pla	ns for a client.			
MEASURE	ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS OBSERVED	ASSESSMENT RESULTS: PERCENTAGE OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	ASSESSMENT RESULTS: 1. EXCEEDS THE ACCEPTABLE TARGET 2. MEETS THE ACCEPTABLE TARGET 3. DOES NOT MEET THE ACCEPTABLE TARGET 4. INSUFFICIENT DATA





Direct Measure 1: CPC Comprehensive Exam-Score	90% of BA Consumer and Family Financial Services students must score 400 or higher on the CPC comprehensive exam.	8	9	8 out of 9 (88.89%) BA Consumer and Family Financial Services students from July 1, 2021 to June 30, 2022 scored 400 or higher on the CPC comprehensive exam.	1. EXCEEDS THE ACCEPTABLE TARGET
Direct Measure 2: CPC Comprehensive Exam- Quantitative Research Techniques and Statistics Section	BA Consumer and Family Financial Services students, on average, will score at or above the average in the Peregrine Academic Services (PAS) Online Campus and Traditional Campus Aggregate Pools related to the Quantitative Research Techniques and Statistics section of the CPC comprehensive exam when compared to other competitive programs.	UAGC: N=9, Mean=533, Traditional: 38700/531: Online: 32430/552	UAGC: N=14, Mean=728, Traditional: 420/531: Online: 2760/528	On average BA Consumer and Family Financial Services students did not score above the average of the Peregrine Academic Services Online Aggregate Pool, and above the average of the Traditional Aggregate Pool on the Quantitative Research Techniques and Statistics section of the Common Professional Component comprehensive	2. MEETS THE ACCEPTABLE TARGET



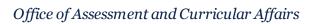


				exam.	
Direct Measure 3: BUS405 Final Assignment	70% of Bachelor of Arts in Consumer and Family Financial Services students must receive a proficient, or distinguished evaluation on relevant content criteria mapped to this PLO.	50	63	50 out of 63 (79.94%) of records evaluated indicate proficient or distinguished performance on this key assignment's content criteria mapped to this PLO at the Mastered level.	3. MEETS THE ACCEPTABLE TARGET
Indirect Measure 1: End of Program Survey PLO5	70% or more of students exiting the program will express satisfaction on the End of Program Survey by indicating either "Agree" or "Strongly Agree." The item to be used will be: • I effectively constructed both shortrange and long range financial plans for a client.	7	8	87.50% of BA Consumer and Family Financial Services students upon completion of the program during the 2020-21 assessment cycle indicated that they agreed or strongly agreed that they effectively constructed both short range and long range financial plans for a client.	1. EXCEEDS THE ACCEPTABLE TARGET

PLO 6 - Examine the role of life, health, property, and casualty insurance in business and personal financial planning.

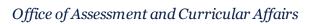


MEASURE	ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS OBSERVED	ASSESSMENT RESULTS: PERCENTAGE OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	ASSESSMENT RESULTS: 1. EXCEEDS THE ACCEPTABLE TARGET 2. MEETS THE ACCEPTABLE TARGET 3. DOES NOT MEET THE ACCEPTABLE TARGET 4. INSUFFICIENT DATA
Direct Measure 1: CPC Comprehensive Exam-Score	90% of BA Consumer and Family Financial Services students must score 400 or higher on the CPC comprehensive exam.	8	9	8 out of 9 (88.89%) BA Consumer and Family Financial Services students from July 1, 2021 to June 30, 2022 scored 400 or higher on the CPC comprehensive exam.	1. EXCEEDS THE ACCEPTABLE TARGET
Direct Measure 2: CPC Comprehensive Exam - Business Finance	BA Consumer and Family Financial Services students, on average, will score at or above the average in the Peregrine Academic	UAGC: N=9, Mean=644,	UAGC: N=9, Mean=644,	On average, BA Consumer and Family Financial	2. MEETS THE ACCEPTABLE





Section	Services (PAS) Online Campus and Traditional Campus Aggregate Pools related to the Business Finance section of the CPC comprehensive exam when compared to other competitive programs.	Traditional: 42510/526: Online: 38160/532	Traditional: 42510/526: Online: 38160/532	Services students scored above the average of the Peregrine Academic Services Online Aggregate Pool, and above the average of the Traditional Aggregate Pool on the Business Finance section of the Common Professional Component comprehensive exam.	TARGET
Direct Measure 3: BUS342 Final Paper	70% of BA Consumer and Family Financial Services students must receive a proficient, or distinguished evaluation on relevant content criteria mapped to this PLO.	8	10	8 out of 10 (80.00%) of records evaluated indicate proficient or distinguished performance on this key assignment's content criteria mapped to this PLO at the Reinforced level.	1. EXCEEDS THE ACCEPTABLE TARGET
Indirect Measure 1: End of Program Survey	70% or more of students exiting the program will express satisfaction on the End of	7	8	85.70% of BA Consumer and	1. EXCEEDS THE ACCEPTABLE

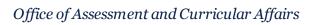




PLO6	Program Survey by indicating either "Agree"	Family Financ	ial TARGET
	or "Strongly Agree." The item to be used will	Services stude	nts
	be:	upon complet	on
	• I effectively examined the role of life,	of the program	n
	health, property, and casualty insurance in	during the 202	20-21
	business and personal financial planning.	assessment cy	cle
		indicated that	they
		agreed or stro	ngly
		agreed that th	еу
		effectively	
		examined the	role
		of life, health,	
		property, and	
		casualty insu	ance
		in business ar	d
		personal fina	ncial
		planning.	

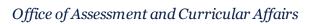


PLO 7 - Evaluate various types of investments in terms of their risks and potential returns.						
MEASURE	ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	TOTAL NUMBER OF STUDENT RECORDS OBSERVED	ASSESSMENT RESULTS: PERCENTAGE OF STUDENT RECORDS MEETING ACCEPTABLE TARGET	ASSESSMENT RESULTS: 1. EXCEEDS THE ACCEPTABLE TARGET 2. MEETS THE ACCEPTABLE TARGET 3. DOES NOT MEE THE ACCEPTABLE TARGET 4. INSUFFICIENT DATA	
Direct Measure 1: CPC Comprehensive Exam-Score	90% of BA Consumer and Family Financial Services students must score 400 or higher on the CPC comprehensive exam.	8	9	8 out of 9 (88.89%) BA Consumer and Family Financial Services students from July 1, 2021 to June 30, 2022 scored 400 or higher on the CPC comprehensive exam.	1. EXCEEDS THE ACCEPTABLE TARGET	
Direct Measure 2: CPC Comprehensive Exam —	BA Consumer and Family Financial Services students, on average, will score at or above	UAGC: N=9, Mean=644,	UAGC : N=9, Mean=644,	On average, BA Consumer and	2. MEETS THE ACCEPTABLE	





Business Finance Section	the average in the Peregrine Academic Services (PAS) Online Campus and Traditional Campus Aggregate Pools related to the Business Finance section of the CPC comprehensive exam when compared to other competitive programs.	Traditional: 42510/526: Online: 38160/532	Traditional: 42510/526: Online: 38160/532	Family Financial Services students scored above the average of the Peregrine Academic Services Online Aggregate Pool, and above the average of the Traditional Aggregate Pool on the Business Finance section of the Common Professional Component comprehensive exam.	TARGET
Direct Measure 3: BUS405 Final Paper	70% of BA Consumer and Family Financial Services students must receive a proficient, or distinguished evaluation on relevant content criteria mapped to this PLO.	50	63	50 out of 63 (79.37%) of records evaluated indicate proficient or distinguished performance on this key assignment's content criteria mapped to this PLO at the Reinforced level.	1. EXCEEDS THE ACCEPTABLE TARGET
Indirect Measure 1:	70% or more of students exiting the program	8	8	100.00% of BA	1. EXCEEDS THE





End of Program Survey	will express satisfaction on the End of		Consumer and	ACCEPTABLE
PLO7	Program Survey by indicating either "Agree"		Family Financial	TARGET
	or "Strongly Agree." The item to be used will		Services students	
	be:		upon completion	
	I effectively evaluated various types of		of the program	
	investments in terms of their risks and		during the 2020-21	
	potential returns.		assessmentcycle	
			indicated that they	
			agreed or strongly	
			agreed that they	
			evaluated various	
			types of	
			investments in	
			terms of their risks	
			and potential	
			returns.	



OVERALL RECOMMENDATIONS

Overall, it is recommended that the Program Lead for the Bachelor of Arts in Consumer and Family Financial Services review the assessment plans (including measures used, alignment mapping, and targets set) and Curriculum Map in preparation for the 2022-2023 assessment cycle. This will determine the appropriateness of the assignments and mapping for each PLO.

ANNUAL ASSESSMENT PLAN ACTION ITEM STATUS REPORT						
OUTCOME	MEASURE	KEY/RESPONSIBLE PERSONNEL	STATUS	ANTICIPATED DATE OF COMPLETION		
ALL PLOS	Any Direct Measure based on CPC.	SUSAN GOULD, LEAD FACULTY	NOT STARTED	2023		
Action Details	Assess the alignment for the Peregrine CPC sections. Each PLO should align with a topic for the CPC exam, adjusting these areas will highlight the need to align sections per PLO to meaningful student learning.					