BA CONSUMER AND FAMILY FINANCIAL SERVICES: ANNUAL ASSESSMENT PLAN & FINDINGS

2021-2022 ACADEMIC YEAR

2021– 2022 CURRICULUM MAP

	PLO 1 Recommend appropriate financial information to individual consumers.	**PLO 2** Assess 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.	**PLO 4** Assess the role of financial advisor in the provision of business services to clients.	**PLO 5** Construct both short range and long range financial plans for a client.	**PLO 6** Examine the role of life, health, property, and casualty insurance in business and personal financial planning.	**PLO 7** Evaluate various types of investments in terms of their risks and potential returns.
BUS 215: Personal Financial Management	**I**	**I**	**I**	**I**	**I**	**I**	**I**
BUS 311: Business Law I		**I**					
FIN 301: Ethics for the Finance Professional	**R**	**R**		**R**			
ECO 203: Principles of Macroeconomics			**I**				**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**		

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	**M**	**M**	**M**	**M**	**M**	**M**	**M**

I(INTRODUCED) R (REINFORCED) M (MASTERED)

ANNUAL ASSESSMENT PLAN FINDINGS					
PLO 1 - Recommend appropriate financial information to individual consumers.					
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 – Marketing 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 Marketing section of the CPC comprehensive exam when compared to other competitive programs.	**UAGC:** N=9, Mean=711, **Traditional:** 42810/606: **Online:** 38310/622	**UAGC:** N=9, Mean=711, **Traditional:** 42810/606: **Online:** 38310/622	On average, BA Consumer and 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 Marketing section of the Common Professional Component comprehensive exam.	**2. MEETS THE ACCEPTABLE TARGET**

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 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 Environment of Business Section	the average in the Peregrine Academic Services (PAS) Online Campus and Traditional Campus Aggregate Pools related to the Legal Environment of Business section of the CPC comprehensive exam when compared to other competitive programs.	**Traditional:** 41970/586: **Online:** 41580/622	**Traditional:** 41970/586: **Online:** 41580/622	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 Legal Environment of Business section of the Common Professional Component comprehensive exam.	**TARGET**
Direct Measure 2: BUS323 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.	19	24	19 out of 24 (79.17%) 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 PLO2	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 assessed legal concepts and their application to the individual investor.	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 assessed legal concepts and their application to the individual investor.	**1. EXCEEDS THE ACCEPTABLE TARGET**

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 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 –	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 Services (PAS) Online Campus and Traditional Campus Aggregate Pools related to the Business Ethics section of the CPC comprehensive exam when compared to other competitive programs.	**Traditional:** 40950/567: **Online:** 43560/603	**Traditional:** 40950/567: **Online:** 43560/603	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 Ethics section of the Common Professional Component comprehensive exam.	**TARGET**
Direct Measure 3: ECO316 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.	28	28	28 out of 28 (100.00%) 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:	70% or more of students exiting the program	7	8	87.50% of BA	**1. EXCEEDS THE**

End of Program Survey PLO3	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 evaluated personal financial practices to achieve the most efficient use of the client's financial resources.			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 evaluated personal financial practices to achieve the most efficient use of the client's financial resources.	**ACCEPTABLE TARGET**

PLO 4 - Assess the role of financial advisor in the provision of business services to clients.					
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: BUS342, Final Assignment	70% of BA 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 Mastered level.	**1. EXCEEDS THE ACCEPTABLE TARGET**
Indirect Measure 1: End of Program Survey PLO4	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:	8	8	100.00% of BA Consumer and Family Financial Services students upon completion	**1. EXCEEDS THE ACCEPTABLE TARGET**

	• I effectively assessed the role of financial advisor in the provision of business services to clients.			of the program during the 2020-21 assessment cycle 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 plans 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 short range 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" or "Strongly Agree." The item to be used will be: • I effectively examined the role of life, health, property, and casualty insurance in business and personal financial planning.			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 examined the role of life, health, property, and casualty insurance in business and personal financial planning.	**TARGET**

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 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 –	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 PLO7	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 evaluated various types of investments in terms of their risks and potential returns.			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 evaluated various types of investments in terms of their risks and potential returns.	**ACCEPTABLE TARGET**

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.			