

**FORM 201C: SUMMARY OF TREND [Instructional Programs – Undergraduate and Graduate Majors]**

**Program & Department** Finance – Accounting and Finance

**Assessment Coordinator** Ernst Coupet, Ph.D.

**Directions:** Assessment trend data is recorded in 3-year cycles. Provide the information requested in each column along with a summary of action. Attach the assessment plan.

	<b>May 2013 Report</b>		<b>By May 2014 Report</b>	
<u>Instruments</u>	<u>2012/2013 Results</u>	<u>Actions Taken</u>	<u>2013/2014 Results</u>	<u>Actions Taken</u>
<b>Graduation Rates</b>	Report not filed		20%	The actual graduation rate of 20% falls just short of the targeted rate of 25%. While this is not far off the mark, we will work closely with finance program advisor to reach out to students who are part of that cohort. The Department will make certain that matriculation is facilitated by reducing institutional barriers, i.e. offering courses on a timely basis, educating students on proper course sequencing, etc.
<b>1<sup>st</sup> Year Retention Rates</b>	Report not filed		100%	No action required

<p><b>Senior Exit Questionnaire</b></p>	<p>Report not filed</p>		<p>Overall instruction by faculty: 3.4/4.0          Accessibility of instructors: 3.6/4.0          Academic advising: 3.2/4.0          Course availability: 2.2/4.0          Library collection: 3.0/4.0          Prep for employment: 3.2/4.0          Prep for Grad school: 3.3/4.0</p>	<p>Overall, students rate their experience in the Program as good to excellent.  <i>A program course plan has been developed and program advisor will make it available to students.</i>  <b><i>Required courses will be offered at least once a year, based on a schedule made public to finance students.</i></b></p>
<p><b>Comprehensive Exam</b>  <b>SLO: a.</b>          Prescribe financial management theory to solve a problem</p>	<p>Report not filed</p>		<p><b>Financial theory:</b>  <b>Percentage of students scoring at least 60% in:</b>          Investments: 45% / 60%          Corporate finance: 27% / 60 %          Investments: 45% / 60%          Derivatives: <b>64% / 60%</b>          Overall: 27% / 60%  <b>Needs improvement.</b></p>	<ol style="list-style-type: none"> <li><b>1. Develop master course outline for each required course in the Program. <b>In progress</b></b></li> <li><b>2. Increase the number of required Program courses from 7 to 8. Completed – effective fall 2014.</b></li> <li><b>3. Revise instrument –not balanced in content covered. <b>To do assigned to faculty for revision.</b></b></li> </ol>

<p><b>Financial Modeling Project</b>  <b>SLO: c.</b>  Integrate financial analysis technology to solve business related problems</p>	Report not filed		<table border="1"> <thead> <tr> <th>Grade</th> <th>Number</th> </tr> </thead> <tbody> <tr> <td>A</td> <td>0</td> </tr> <tr> <td>B</td> <td>5</td> </tr> <tr> <td>C</td> <td>1</td> </tr> <tr> <td>D</td> <td>1*</td> </tr> <tr> <td>F</td> <td>0</td> </tr> </tbody> </table>		Grade	Number	A	0	B	5	C	1	D	1*	F	0	No action required.
			Grade	Number													
			A	0													
			B	5													
			C	1													
			D	1*													
F	0																
<p>*Incomplete  86% (&gt; 70%) of students earned a minimum of a C on the project.</p>																	

<p align="center"><b>Bloomberg Aptitude Test (BAT)</b></p> <p align="center"><b>SLO e.</b></p> <p>Integrate financial concepts in a global business</p>	Report not filed			CSU AVG (n=18)	US AVG (n=36,513)	<p>To be removed as an assessment instrument</p> <p>International finance is now a required course in the finance curriculum. Until now, it has been an elective course. We will continue to monitor student comprehension in this area. Moving forward, another assessment instrument will be implemented to assist in this process.</p>
		Analytical Reasoning	20	23		
		Charts and graphs	17	26		
		Math skills	19	25		
		News analysis	20	27		
		Economics	22	28		
		Financial statement analysis	24	26		
		<b>Global markets</b>	<b>16</b>	<b>25</b>		
		Investment Banking	20	26		
		<p>The sample variances are unknown, so a t statistic could not be computed to determine statistical significance of the difference. However, considering that their mean scores in the global markets category are so different in the absolute sense, we can conclude that the CSU average is less than the US average.</p> <p>This score suggests that a review of the global aspects of the curriculum is warranted.</p>				

<b>Writing Sample</b> <b>SLO: b.</b> Organize thoughts/data to effectively communicate in a business environment	Report not filed		Grade	Number	No action required.
			A	6	
			B	5	
			C	0	
			All students scored a minimum of a B on the writing sample. <b>Great results!</b>		
<b>Senior Exit Survey</b> <b>SLO. F.</b> Assess organizational diversity in a corporate environment	Report not filed		100% of students polled stated that diversity in a business or organization is at least important. Great result!		No action required

[Add cells as needed]