

UNIVERSITY ASSESSMENT COMMITTEE
Feedback to Non-Academic Units on Assessment Activities Reported in FY2014 *(Academic year)*
NON-ACADEMIC PROGRAMS

DEPARTMENT Financial Wellness **DATE** October 21, 2014

PROGRAM(S) COVERED IN REVIEW Financial Wellness

COMMITTEE MEMBER(S) CONDUCTING REVIEW Kenneth Ruit, Joan Hawthorne

1. STUDENT LEARNING GOALS

- | | | | |
|---------------------------------------|------------------|----------------|----------------------------|
| • Were any goals referenced? | YES <u> X </u> | NO <u> </u> | QUALIFIED Y/N <u> </u> |
| • If so, were goals well-articulated? | YES <u> </u> | NO <u> </u> | QUALIFIED Y/N <u> X </u> |
| • Do goals address student learning? | YES <u> </u> | NO <u> </u> | QUALIFIED Y/N <u> X </u> |

Comments: Financial Wellness does not have a current assessment plan posted on the assessment plan website. In the plan included in the unit’s annual assessment report, Financial Wellness identified 5 overall goals (which were identified as ‘objectives’). Four of the five goals included more specific, measurable objectives. Goal 2 has a clear connection to student learning – “Increasing students’ financial knowledge.” Goal 1 has sub-items that are not written in student-outcome language but could be (e.g., the unit wants to be successful at “teaching students effective ways to manage their money” which could be framed as “students will be able to effectively manage their money”). The other goals address reducing students’ financial stress, placing an emphasis on outreach to low income, underrepresented, non-traditional students (including students in high debt programs), marketing the services of the unit, and relating services to student performance and retention. Some objectives are clear statements of what Financial Wellness desires to accomplish. Others are stated in the past tense as what actions have been taken.

In addition to program goals, please also consider UND’s institutional and Essential Studies goals for student learning (shown in alignment within parentheses). Identify UND/Essential Studies goals which are similar to the referenced program goals.

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|----------------|--|
| <u> </u> 1 | Communication – written or oral (“able to write and speak in various settings with a sense of purpose/audience”) |
| <u> X </u> 2 | Thinking and reasoning – critical thinking (or “be intellectually curious”; analyze, synthesize, evaluate) |
| <u> </u> 3 | Thinking and reasoning – creative thinking (or “be intellectually creative”; explore, discover, engage) |
| <u> X </u> 4 | Thinking and reasoning – quantitative reasoning (“apply empirical data...analyze graphical information”) |
| <u> X </u> 5 | Information literacy (“be able to access and evaluate...for effective, efficient, and ethical use”) |
| <u> </u> 6 | Diversity (“demonstrate understanding of diversity and use that understanding...”) |
| <u> X </u> 7 | Lifelong learning (“commit themselves to lifelong learning”) |
| <u> </u> 8 | Service/citizenship (“share responsibility both for their communities and for the world”) |

Comments regarding program goals and alignment with institutional and Essential Studies goals: While the unit does not specifically articulate alignment of its goals/objectives to Essential Studies goals, increasing students’ knowledge in a way that impacts their ability to build budgets, understand and analyze factors influencing finances, and make short-term and long-term financial decisions do perhaps align best with ‘critical thinking’, ‘quantitative reasoning’, ‘information literacy’, and ‘lifelong learning’.

2. ASSESSMENT METHODS

- | | | | |
|--|------------------|-----------------|----------------------------|
| Were any specific assessment methods referenced? | YES <u> X </u> | NO <u> </u> | QUALIFIED Y/N <u> </u> |
| • If so, were specifically chosen assessment methods appropriately aligned with individual goals? | YES <u> </u> | NO <u> </u> | QUALIFIED Y/N <u> X </u> |
| • Were both direct and indirect assessment methods used as components of a “multiple measures” approach? | YES <u> </u> | NO <u> X </u> | QUALIFIED Y/N <u> </u> |

Comments: The unit tracks data on the number of students seeking its services as well as the number of students attending outreach events. At every student appointment/encounter, the unit administers a pre-appointment and/or post-appointment survey using Qualtrics to collect student perceptions or data about student knowledge of specific financial topics. Surveys are the principal source of assessment data collected by the unit, which, since students participate in Financial Wellness programming voluntarily, may be the most viable assessment strategy. It appears from the discussion under “loop closing”

that the questions used to assess the second goal (objective 2) may be quite strongly aligned with the intended learning outcome although, as noted in the report, this is the first year that the tool has been used and they are not yet satisfied with the quality of the information generated.

3. ASSESSMENT RESULTS

Were any assessment results reported?	YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>	QUALIFIED Y/N <input type="checkbox"/>
<ul style="list-style-type: none"> • If so, were the results clear in terms of how they specifically affirm achievement of goals? 	YES <input type="checkbox"/>	NO <input type="checkbox"/>	QUALIFIED Y/N <input checked="" type="checkbox"/>
<ul style="list-style-type: none"> • If so, were the results clear in terms of how they indicate need for improvement? 	YES <input type="checkbox"/>	NO <input type="checkbox"/>	QUALIFIED Y/N <input checked="" type="checkbox"/>
<ul style="list-style-type: none"> • Were the results tied to goals for student learning? 	YES <input type="checkbox"/>	NO <input type="checkbox"/>	QUALIFIED Y/N <input checked="" type="checkbox"/>

Comments: In some cases, results clearly affirmed achievement of goals. For example, 100% of students in the high-debt program in medicine found the unit's presentation and consultation beneficial to their learning. In addition, data from students about marketing of the unit's services through social media and other outlets was specific and informative. Students were also clear in their feedback that learning more about how to address financial needs and concerns helps them focus better on their own academic success. How student report stress about financial issues and how their stress is reduced following appointments is less clear from the data. Also, survey questions addressing students' financial knowledge did not yield data reliable enough to determine whether students learned what was intended. Overall, staff in the department are still refining the tools in order to most clearly answer their assessment and program evaluation questions.

In addition to program goals, some assessment results may be applicable to institutional and Essential Studies goals. Please identify those results which are applicable to institutional/Essential Studies goal achievement. For indicated items, please describe findings below. .

- 1 Communication – written or oral (“able to write and speak in various settings with a sense of purpose/audience”)
- 2 Thinking and reasoning – critical thinking (or “be intellectually curious”; analyze, synthesize, evaluate)
- 3 Thinking and reasoning – creative thinking (or “be intellectually creative”; explore, discover, engage)
- 4 Thinking and reasoning – quantitative reasoning (“apply empirical data...analyze graphical information”)
- 5 Information literacy (“be able to access and evaluate...for effective, efficient, and ethical use”)
- 6 Diversity (“demonstrate understanding of diversity and use that understanding...”)
- 7 Lifelong learning (“commit themselves to lifelong learning”)
- 8 Service/citizenship (“share responsibility both for their communities and for the world”)

Comments regarding results and the application of results to programmatic, institutional, and Essential Studies goals: Students clearly perceive there is benefit in either attending events/presentations conducted by Financial Wellness or by making appointments and seeking individualized consultation. Feedback to date indicates reduced levels of personal stress, positive feelings of benefit, best practices in unit marketing strategies, and positive influences on student academic success and persistence/retention at UND. Financial Wellness reported that survey results are inconclusive about what students are actually learning primarily because students were asked to respond to survey questions on topics that, in many cases, had little overall relationship to topics discussed during their consultations/appointments.

4. CLOSING THE LOOP

Were any actions taken on the basis of assessment results reported?	YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>	QUALIFIED Y/N <input type="checkbox"/>
<ul style="list-style-type: none"> • If so, do curricular or other improvements/changes arising from assessment results directly address goals for student learning? 	YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>	QUALIFIED Y/N <input type="checkbox"/>

Comments: Intentional changes/improvements to questions or response scales (Likert-type) on the survey instruments utilized to collect student feedback have improved ranges of options with greater degrees of specificity in an attempt to collect more specific, detailed and meaningful data. New assessment strategies for measuring learning outcomes at events and presentations are also being developed.

SUMMARY

Strengths

- A specific plan for assessment is in place.
- Student learning goals are well-articulated.
- Assessment methods are clearly described.
- Assessment methods are appropriately selected.
- Assessment methods are well-implemented.
- Direct and indirect methods are implemented.
- Results are reported.
- Results are tied to closing the loop.
(Decision-making is tied to evidence.)

Areas for Improvement

- No specific plan for assessment is in place.
- Student learning goals are not well-articulated.
- Assessment methods are not clearly described.
- Assessment methods are not appropriately selected.
- Assessment methods are not well-implemented.
- A single type of assessment methods predominates.
- No results are reported.
- Results are not clearly tied to closing the loop.
(Decision-making is not directly tied to evidence.)

OVERALL SUMMARY AND RECOMMENDATIONS: *Most elements of Financial Wellness' assessment plan could be identified by reviewing goals, objectives and assessment methods in the table included in the annual assessment report. The committee recommends, however, that an assessment plan be posted on the departmental assessment plans website. Some Financial Wellness goals/objectives have a clear relationship to student learning outcomes; others are more directly related to how the program is designed and implemented. Some objectives are clear statements of what Financial Wellness desires to accomplish. Others are stated in the past tense as what was done. Consistency in how overall goals are stated for the unit would be beneficial. The unit collects student feedback through survey instruments as its method for assessing goal-related outcomes. Student perceptions are, in large part, the data that is collected. In addition, the unit desires to collect feedback from students that more directly addresses specifics regarding what students have learned. Financial Wellness has, to date, been less successful collecting meaningful student learning data. As a result, the unit has taken specific, intentional actions in revising pre- and post-appointment survey/test instruments or constructing new instruments in an effort to collect the data that is most meaningful in terms of informing change or improvement in practice and services rendered to students.*

MATERIALS REVIEWED

- Annual assessment report
- Assessment plan (as posted) – *included in annual report but not posted on website*
- Previous assessment review
- Other (please describe)

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Section 1: Q Section 2: Q Section 3: Q Section 4: Y

Coding Key:

- Y = yes, this is done appropriately and well (bearing in mind the kind of program(s) reviewed and recognizing that assessment is a cyclical process, i.e., with additional kinds of data to be collected in other years)
- Q = qualified yes as action or progress is apparent; however, evidence is lacking that this is completely and appropriately done
- N = no, it is unclear whether it was done at all, or it is not done in relationship to student learning