

**Texas A&M International University
Annual Institutional Effectiveness Review (AIER)
for Academic Programs**

Program: BBA Finance

Assessment Period Covered: January 1, 2009 to January 31, 2010

Program Coordinator (Preparer of Report) Jorge Brusa

List Other Program Faculty:

Anand Jha
Shankar Siddharth

Reviewed by Chair: Name Dr. Hung Date _____

Reviewed by Dean: Name Dr. Sears Date _____

The Annual Institutional Effectiveness Review for Academic Programs is directed at Goal 1: Academics of the Texas A&M International University 2006-2010 Strategic Plan:

Develop, maintain, assess, and improve academic programs, administrative/educational support services and student services, to admit, retain, and graduate students who achieve established learning outcomes designed to prepare them for success in their chosen careers.

Institutional Mission

Texas A&M International University, a Member of The Texas A&M University System, prepares students for leadership roles in their chosen profession in an increasingly complex, culturally diverse state, national, and global society ... Through instruction, faculty and student research, and public service, Texas A&M International University embodies a strategic point of delivery for well-defined programs and services that improve the quality of life for citizens of the border region, the State of Texas, and national and international communities.

Academic Program Mission

The mission of the BBA-Finance program is to prepare students for professional positions in the field of general business, banking, corporate finance and investments.

Provide summary of the last cycle's use of results and changes implemented

Senior finance students worked in group projects and present their projects to Dr. Rivas, Dr. Garcia and Dr. Brusa in the class Finance 3330 Investments and Portfolio Analysis. The topics examined were stock valuation and portfolio management. The group made formal presentations and they performed very well in the evaluation of individual securities, but they have problems in the evaluation of portfolios. Based on these results the faculty suggested: a) the students work with cases before arriving to advanced classes, b) put more emphasis in the integration of results (portfolio).

Selected list of program-level intended student learning outcomes (*It is recommended that programs rotate through their entire set of outcomes over a multi-year period. Programs may focus on one or two outcomes each year, as deemed appropriate*).

1. Students completing the BBA-Finance will understand the fundamental concepts of general business
2. Students completing the BBA-Finance will understand the fundamental concepts of banking, corporate finance and investments
3. Students completing the BBA-Finance will demonstrate the necessary skills to analyze the financial condition of a company and present a written report
- 4.
- 5.

Section I: Planning and Implementation

Outcome(s): *Identify the outcome(s) that will be focused upon this year.*

1. Students will demonstrate knowledge of economics, marketing, finance, and accounting and integrated knowledge based on two or more of the previously mentioned areas
2. Students will demonstrate knowledge of corporate finance, investments and banking
3. Students will demonstrate knowledge of financial statements analysis.

Please indicate if the outcome(s) is (are) related to writing (QEP).

Methods of assessment to be used: *The explanation should identify and describe the type of assessment(s) that will be used (e.g., survey, questionnaire, observation instrument, test, rubric to evaluate performance, standardized examination, action research, interviews, etc.), who will provide the information, and how the data will be obtained.*

Senior finance students will work in Group projects and presentations and the finance faculty will evaluate the presentations and group projects.

Indicate when assessment(s) will take place

Fall 2009

Criteria/Benchmark(s): *Specify, if deemed appropriate to assess outcome(s). Criteria/ benchmark(s) may be optional, especially if qualitative measures are used for data collection.*

The benchmark is a score of 70 out of 100.

Section II: Analysis of Results

What were the results attained? *Describe the primary results or findings from your analysis of the information collected. This section should include an explanation of any strength(s) or weakness(es) of the program suggested by the results.*

Senior finance students participate in a competition using Marketwatch (stock game simulator) and wrote a project about their participation in the competition. Each project was presented in the class Finance 3330 to Dr. Camacho and Dr. Brusa. The goal of the project was to apply Technical Analysis in the purchasing of stocks. The faculty evaluated if the students understood the fundamental concepts of investments and corporate finance (learning outcome #2). The students made good decisions in the selection of the securities, but they have problems in the control of their portfolios. The average scores were between 60 and 70 points.

What were the conclusions reached? *Should include a brief description of the procedure used for reaching the conclusion(s) based on the evidence collected and describe the process used to disseminate the information to other individuals. For example, if the discussion took place during the annual spring retreat, include a summary from those deliberations using the Meeting Minutes template found at <http://www.tamtu.edu/integrate/docs/Minutes-Template.doc>. Once completed, submit the minutes to assessment@tamtu.edu.*

Based on these results the faculty suggested that in order to improve student understanding of investments and corporate finance: a) the use of game simulators in other Finance classes, b) add a portfolio class to the program.

Describe the action plan formulated. (The plan may be multi-year in nature.)

Based on the conclusion(s), describe the action plan to be implemented to improve or maintain student learning, including a timeline for implementation.

The new portfolio class will be introduced in the Fall 2010 semesters to majors in Finance

Resource(s) to implement action plan: *Describe the resources that will be needed to implement the action plan. Also indicate if the resources are currently available, or if additional funds will be needed to obtain these resources.*

Funding

- New Resources Required
- Reallocation of current funds

Physical

- New or reallocated space

Other

- Primarily faculty/staff time
- University/rule procedure change only

Provide a narrative description and justification for requested resources (include linkage to Strategic Plan)

Enter text here

Identify proposed outcomes for the next assessment cycle:

Continuation of present outcome(s) – (Indicate reason for continuation):

1. Students completing the BBA-Finance will understand the fundamental concepts of general business
2. Students completing the BBA-Finance will understand the fundamental concepts of banking, corporate finance and investments
3. Students completing the BBA-Finance will demonstrate the necessary skills to analyze the financial condition of a company and present a written report

New Outcome(s) – (List outcomes below):

Enter text here

Modification of present outcome(s) – (Indicate reason for modification):

Enter text here

Date Completed: 4/13/10

Submit completed form to integrate@tamiu.edu.

Updated 09/03/2009