

MSFA Assurance of Learning Report

AY 2014-2015

Report Date: 11/11/2015
School/College: School of Management
Department/Program: Master of Science in Financial Analysis
Person completing the Report: John Veitch

Phase 1: Assessment Process

Overview Statement: Briefly summarize the student learning assurance activities that were undertaken this academic year. Indicate which learning outcome was assessed and who was involved in the evolution.

Learning Outcome: 3-3 *Ethics - Duties to Investors*

Specify and quantify investor objectives, constraints, and preferences and develop an appropriate investment policy statement. Develop strategies for managing portfolios of domestic and foreign debt and equity securities including the use of derivative securities to adjust risk exposure to meet the investor policy goals.

Evaluator(s): *John Veitch*

Assessment Plan:

Assessment Method Category: *Course Presentation*

Assessment Method: *Construct an Investment Portfolio according to a well-defined Investor Policy Statement and present in class.*

Target: *75% of the students will "Meet Expectations" or better as scored using the provided rubric.*

Courses where method is assessed (if applicable): *MSFA 746 Portfolio Management*

Phase 2: Results Assessment

Results:

Result Date: 11/11/2015

Result Type: *Target Not Met*

Result: *MSFA students performed at or above the skill level of MBA students in the course. Grades received were between A and B+ based on participation. Professor states that only 15% of students performed at or above the desired level.*

Course(s) from which the assessment(s) were gathered: *MBA 6216, MBA 6217 Student-Managed Fund I and II*

Related Documents:

- *Student Managed Fund II Investment Report Spring 2015: SMFnewsletter_Spring_2015.pdf*
- *Student Managed Fund I Investment Report Fall 2014: SMFInvestorNewsletter_1292014.pdf*

Action:

Action Date: 11/11/2015

Action: *Open Student Managed Fund I and II course to full-time MSFA students as part of their elective choices. Also Program Director agreed to substitute Student Managed Fund II for the required MSFA Portfolio Management course. Both actions will improve the number and quality of MSFA students in the course.*