

# CONTINUOUS IMPROVEMENT REPORT 2

UNIVERSITY OF SAN FRANCISCO, SCHOOL OF MANAGEMENT

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# INTRODUCTION

In February 2016, the University of San Francisco, School of Management underwent its five-year AACSB continuous improvement review. The Peer Review team recommended, and the Continuous Improvement Review Committee concurred, that the continuous improvement review for the School of Management be extended for an additional year.

This Continuous Improvement Report 2 (CIR2) articulates a clear strategic plan and addresses the weaknesses and solutions for the School's assurance of learning processes. This report addresses those results identified in the AACSB Continuous Improvement Review Committee letter of May 26, 2016. The Committee's two specific concerns are:

*“Articulate a clear strategic plan that identifies strategic objectives, action steps, responsibilities, and timelines as well as resources (Standard 1: Mission, Impact and Innovation and Standard 3: Financial Strategies and Resource Allocation)”*

This concern is addressed on pages 5-24 of this CIR2 report.

The second area of concern:

*“After reviewing the curriculum management and assurance of learning evidence, significant weaknesses were found that are detailed in section IV of the Team report. The following items should be completed and summarized in the Continuous Improvement Review 2 report or visit:*

- 1. Develop comprehensive direct measure assurance of learning plans for all programs. Each plan should indicate the program's learning outcomes; the assessment activities, measures, and standards to measure the learning outcome; assessment points, and the timeline for assessment. Assurance of learning measurements should be appropriate for assessing individual achievement of learning outcomes.*
- 2. Update all program curriculum maps to indicate assessment points.*
- 3. Develop a comprehensive indirect measures plan for all programs. Each plan should describe the indirect measures used and the scheduled rotation.*
- 4. Complete scheduled AY 15/16 AOL individual student direct measure assessments, reporting results in a consistent format that indicates recommendations and prepares for action to be taken.*
- 5. Execute plans to expand faculty representation of program assessment committees and provide evidence of broad discussions of assessment results. (Standard 8: Curricula Management and Assurance of Learning).”*

These specific concerns are addressed in pages 25-56 of the report. The appendix, pages 57-93, includes supporting documents for the Strategic Plan, program curriculum maps, assessment schedules, MBA and MGEM Assurance of Learning documentation for this year, and full AY 15-16 assessment reports.

# I. STRATEGIC PLANNING

The School of Management has committed itself to an organic strategic planning process to improve faculty and staff engagement and to an on-going, pervasive strategic planning effort. Besides creating trust among the school's stakeholders and respect for strategic planning itself, there are the expected goals of (1) sharing of knowledge and information both internally and externally and (2) uncovering new opportunities for action.

In its five-year Continuous Improvement Review report, the Peer Review Team noted:

With the arrival of a new dean in 2014, the school has undergone a significant amount of strategic planning activity. The process has been much more inclusive and transparent than previous processes and both faculty and staff exhibit a high level of engagement around strategic planning. The philosophy has been to build out from the previous plan developed in 2011, but to also bring greater focus to it and alignment with the resources of the school. For example, there is an emerging emphasis on entrepreneurship, analytics, experiential education, and global education. The cultural shift around strategic planning in the school is palpable and should serve the institution well.

Despite renewed attention to the process, the SOM did not provide a unified strategic plan that expressed strategic objectives, action steps, responsibilities, timelines, and resources. Existing documents offered conflicting information. There is a need to pull all the planning activity into one consistent document that clarifies accomplishments and future directions.

The team was not convinced the school had identified the resources needed to push forward all the priority initiatives, and finding those resources now may prove to be a greater challenge. The university has experienced an enrollment shortfall in 2015-16 that requires major adjustments to the budget, and the institution's ability to provide resources for new programs, such as a proposed MS in Entrepreneurship and Innovation or a MS in Marketing Research and Consumer Insight, is not certain. The school may need to postpone program launch or look for resources from other sources.

In April 2016, Dean Davis reconstituted a school-wide standing Strategic Planning Committee [SPC] with representatives from the academic departments and support units (see Appendix A for list of members). The SPC is co-chaired by Dean Davis and faculty member Richard Stackman.

During 2015, the School of Management held four retreats aimed at better understanding the internal strengths and weaknesses of the School and identifying opportunities and threats emanating from the external environment. Over 100 faculty and staff participated in one of these four retreats; over 25 participated in two retreats. Information from the four aforementioned retreats was integrated with strategic planning documents developed since 2012 (see Appendix B: SOM Strategic Planning Overview—2012-Present) and reviewed at the SPC's first meeting in April. At the April meeting the SPC created three sub-committees charged with reviewing the school's (a) vision and mission, (b) strategic assets and key educational competencies, and (c) strategic priorities and initiatives. The sub-committees reported to the full Strategic Planning Committee in May. A draft strategic plan was developed over the summer and then vetted at the

SPC's meeting in September. Committee members shared the draft document for review with their respective departments/units collecting feedback prior to a school-wide (all-hands) meeting during the fall semester or early spring semester.

The School of Management's strategic plan consists of three elements: (1) the school's vision and mission; (2) the school's strategic assets and key educational competencies; and (3) the school's strategic plan (see Table 1), which includes strategic objectives, specific actions/goals, responsibilities (including faculty involvement), time frames, and resources. Further breakdowns of resources to support the school's strategic priorities are provided via Tables 2a, 2b, and 3.

## VISION AND MISSION

The SPC agreed that the development of new vision and mission statements – distinct from those created in 2011 – was unnecessary. Instead, the SPC chose to fine-tune each statement.

<b>Vision Statement</b>	
<b>2011</b>	<b>2016</b>
<p>The School of Management will be one of the premier teaching, research and networking platforms for managerial education, one that is regionally anchored, nationally recognized and globally connected.</p>	<p>The School of Management will be one of the premier Jesuit teaching, research, and multi-sector engagement platforms for management education, one that is regionally anchored, nationally recognized, and globally connected.</p>
<b>Mission Statement</b>	
<b>2011</b>	<b>2016</b>
<p>The School of Management at the University of San Francisco is a catalyst for change in business, government and nonprofit managerial practice. Through research and teaching that draws on the global diversity and entrepreneurial energy of the region, we educate students to build more productive and compassionate organizations. We value human dignity and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit.</p>	<p>The School of Management at the University of San Francisco is an innovator in business, government, and nonprofit management practice. Drawing on the diversity and entrepreneurial energy of the region, we educate students through research, teaching, and engagement to build high-performing and global responsible organizations. We value human dignity and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit.</p>

The school's vision and mission statements align with that of the university. The words underlined (below) in USF vision and mission statements are reflected in the school's vision and mission, the strategic assets and key educational competencies identified in the next section, and the four strategic outcomes listed in the school's strategic plan.

USF Vision:                    The University of San Francisco will be internationally recognized as a premier Jesuit Catholic, urban university with a global perspective that educates leaders who will fashion a more humane and just world.

USF Mission: The core mission of the university is to promote learning in the Jesuit Catholic tradition. The university offers undergraduate, graduate, and professional students the knowledge and skills needed to succeed as persons and professionals, and the values and sensitivity necessary to be men and women for others.

The university will distinguish itself as a diverse, socially responsible learning community of high quality scholarship and academic rigor sustained by a faith that does justice. The university will draw from the cultural, intellectual, and economic resources of the San Francisco Bay Area and its location on the Pacific Rim to enrich and strengthen its educational programs.

## STRATEGIC ASSETS AND KEY EDUCATIONAL COMPETENCIES

The SPC identified six *strategic assets* and seven *key educational competencies*. *Strategic assets* when combined together cannot be easily copied by other schools and, thus, should be leveraged where appropriate across the School of Management’s programs. *Key Educational Competencies* are the essential skills, knowledge, qualifications and/or capacities developed by students through the School’s degree and non-degree programs.

Strategic Assets	Key Educational Competencies
<ul style="list-style-type: none"> <li>▪ San Francisco Bay Area—Silicon Valley Location</li> <li>▪ Jesuit Values &amp; Network</li> <li>▪ Multi-Sector Orientation</li> <li>▪ Highly Diverse Student Body &amp; Entrepreneurial Alumni</li> <li>▪ World-Class Thought Leaders &amp; Alliances</li> <li>▪ Innovation Culture</li> </ul>	<ul style="list-style-type: none"> <li>▪ Conscious Leadership</li> <li>▪ Innovation, Entrepreneurial Mindset</li> <li>▪ Data-Driven Decision Making</li> <li>▪ Global Responsibility</li> <li>▪ Technologically Proficient</li> <li>▪ Knowledgeable of Global Context</li> <li>▪ Core Knowledge &amp; Skills in Business, Nonprofit, or Public Administration</li> </ul>

## STRATEGIC PLAN

The CIR Committee letter dated May 26, 2016 requested the School:

Articulate a clear strategic plan that identifies strategic objectives, action steps, responsibilities, and timelines as well as resources (Standard 1: Mission, Impact and Innovation and Standard 3: Financial Strategies and Resource Allocation).

Specific to *Standard One*, the school’s Strategic Plan now clearly defines “...the strategies to maintain its resource needs, assign responsibilities to appropriate parties, and set time frames for the implementation of actions that support the mission” (AACSB: Eligibility Procedures and Standards, p. 15).

With respect to planned initiatives, Table 5 from the January 2016 CIR (p. 18) has been incorporated in the Strategic Plan. A revised Table 5 is provided in Appendix C, indicating how these initiatives are linked to the strategic priorities and the commitment of financial resources

necessary to move forward on each.

Related to *Standard Three*, the School's Strategic Plan (via Tables 2a and 2b) identifies the financial resource source(s) for the current and planned activities for the 2016-17 and 2017-18 academic years. Consequently, these two tables reflect how the school has analyzed the costs and needed resources for any stated action/goal.

## Strategic Objectives

The School of Management's strategic plan is founded on four strategic objectives, which were affirmed by the SPC:

1. Academic Program Quality and Currency
2. Student Experiential Learning and Impact
3. Faculty and Staff Engagement
4. Business and Community Engagement

These strategic objectives are consistent with the strategic objectives articulated in 2012. This consistency is noteworthy as it signals continued alignment with the school's and university's missions and the school's focus on leveraging its strategic assets with respect to educational programming, student experiential learning, scholarship, and engagement. Still relevant today are the following strategic objectives from 2012:

- Build a learning community that leverages San Francisco, the Bay Area and the global Jesuit Network to create an academically rigorous and practically relevant managerial learning environment for students. [*Academic Program Quality and Currency; Student Experiential Learning and Impact*]
- Create a vibrant research culture that promotes excellence in research and pursues mission-related scholarship that leverages our strengths. [*Faculty and Staff Engagement*]
- Foster a diverse and inclusive working environment for faculty, staff and students that encourages high performance, teamwork, respect and accountability. [*Student Experiential Learning and Impact; Faculty and Staff Engagement*]
- Generate and nurture mutually beneficial relationships with organizations and individuals that secure access and resources that support the lifelong learning and professional development of our students, faculty and staff. [*Business and Community Engagement*]

## The Strategic Plan

Table 1 presents the actions/goals specific to each of the four strategic objectives. This table assigns responsibilities to appropriate parties, sets times frames for implementation, and the committed resources or an increase in resources for each action/goal.

With respect to responsibility, those positions listed reflect a true commitment to shared accountability among key stakeholders. In the previous strategic plan, responsibility was almost entirely assigned to the dean or to an associate dean.



The strategic plan clearly summarizes the time frames with which actions/goals are completed/achieved, be it specific to a given academic year or on an on-going basis (e.g., annually or bi-annually). Moreover, given the strategic plan is a “living” document, it allows for new actions/goals to be identified, taking into account the time necessary to complete them in relation to other established actions/goals. Based on this representation, responsible parties – including the SPC – can better assess progress toward action/goal completion over time. A column noting that a given action/goal has been completed (and when) has been included in Table 1.

While Table 1 reflects the resources committed (or required) for each action/goal, Table 2a and 2b provide a better summary of the financial resource demands for each specified action/goal. Table 2a and 2b delineates the budget allocations for each action/goal and the source of the resources. Actions/goals are funded from (1) an on-going budget allocation, (2) a new budget allocation, (3) an endowment or the dean’s discretionary funds, or (4) a combination of sources. In both tables, it is noted when funding has not been finalized.

Critical initiatives are reflected by multiple actions/goals. These critical initiatives include:

- A commitment to a culture of continuous improvement through the AoL Process and other program measures (see actions/goals 1.1, 3.2).
- New academic programming (see actions/goals 1.4.1, 1.4.2, 1.4.3). Related to new program initiatives is the review of existing program viability (e.g., the MGEM program, see action/goal 1.3.4).
- An emphasis on experiential education (see Strategic Priority 2).
- A continuing commitment to strengthening the portfolio of faculty scholarship (see actions/goals 2.6.1, 3.3.1).

Table 3 summarizes the endowed funding and gift initiatives listed as an action/goal in Table 1. This summary clearly sets funding requirements for each initiative if it is to move forward.

Finally, the Strategic Plan includes actions/goals based on three key recommendations for consideration by the Peer Review Team.

- The portfolio of faculty scholarship has strengthened from the last review in terms of quantity, quality, and impact, as some faculty have been able to publish in the top journals in their discipline. The overall portfolio looks to be balanced across disciplines and departments. Nevertheless, the school should consider the need to provide more guidance to faculty members around the quality standards for acceptable publication outlets. In the faculty qualifications definitions, the school should consider taking into account the quality of publications in its SA and SP definitions. The current definition considers publication in any journal outlet to be appropriate, but with the rise of “predatory journals,” it may be that some journal outlets have insufficient impact to be considered in the definitions. The school should also consider whether automatically providing PA status for chairs and directors is appropriate (although none currently rely on that designation). (See action/goal 3.3.7)

- The school has graduate programs in the “three sectors” – business, non-profit and government. Several faculty members noted the potential benefits of this, but it does not appear that there is an intentional or strategic effort to take advantage of this opportunity. The team recommends the school consider the strategic possibilities this combination of programs might provide. (See action/goal 3.1.4.1)
- While faculty and staff members are highly supportive of the school’s Jesuit values, students seem largely unaware of the Jesuit influence. The school may wish to consider ways to better leverage this heritage. [Note: This is being addressed, in part, with the introduction of the Management Exercises in the MBA and BSBA programs (see actions/goals 2.3.3, 2.4.2).]

## Summary

Over the past two years, the school has been focused on addressing systemic weaknesses in various internal processes. Per the Peer Review Team’s report, the school’s philosophy has been to “build out from the previous plan developed in 2011, but to also bring greater focus to it and alignment with the resources of the school.” The school has been successful in demonstrating improvements in faculty qualifications and faculty sufficiency. The school has implemented a more transparent budgeting process, which parenthetically reflects a stronger general financial operating position for the school. Also, greater efficiencies and effectiveness have been realized through job redesign (i.e., creation, elimination, and combination of positions) of non-faculty staff. These efforts have created a stronger foundation from which the school’s primary stakeholders can turn their focus to emerging opportunities and threats. During the 2016-17 academic year, the SPC will build out the plan through 2020. The SPC will be at the forefront of discussions that move beyond internal operational issues, which are key to future strategic planning, and to higher-level issues (e.g., strategic possibilities for the “three sectors” model; branding of programs, integration of hybrid and/or online learning). To this latter point, the SPC will take the lead, working with the faculty and staff, on how best to leverage the strategic assets via expansion (or retrenchment) of programs in relation to these identified higher-level issues.

## STRATEGIC PLAN TABLES

**Table 1** presents the actions/goals specific to each of the four strategic objectives. This table assigns responsibilities to appropriate parties, and sets times frames for implementation. The dollar figures represent committed resources or an increase in resources for each action/goal.

Table 2a, Table 2b and Table 3 are summaries of information provided in Table 1.

**Table 2a** and **Table 2b** summarize only actions/goals with dedicated/planned funding for the academic years 2016-17 and 2017-18. Actions/goals are funded from (1) an on-going budget allocation; (2) a new budget allocation; (3) an endowment, dean's discretionary funds, restricted accounts, or university funds; or (4) a combination of sources.

**Table 3** summarizes the endowed funding and gift initiatives listed as an action/goal in the school's strategic plan.

### Acronyms used in Tables

AoLC:	AoL Committee
FDC:	Faculty Development Committee
FGC:	Faculty Governance Council
GPC:	Graduate Program Committee
UPC:	Undergraduate Program Committee
AD-AA	Associate Dean, Academic Affairs
AD-Grad	Associate Dean, Graduate Programs
AD-UG	Associate Dean, Undergraduate Programs

**Table 1. Strategic Plan**

**Strategic Objective #1: Academic Program Quality and Currency**

Steps	Actions/Goals	Responsibility	Resources	Time Frame	Notes	Completed
<b>1.1</b>	<b><u>Program Measures/Reports</u></b>					
1.1.1	Assess Market Position	Associate Deans, Academic Program Directors	\$20,000	Every 2-3 Years	Funded through SOM Strategic Planning. To be conducted in 2017-18.	
1.1.2	Report Enrollment Trends	Associate Deans, Academic Program Directors	None	Annual		
1.1.3	Prepare Student Profiles (including Placement Statistics)	Associate Deans, Program Directors	None	Annual	Using Handshake, software for tracking student engagement and placement; cost absorbed by University. (See 2.3.1)	
1.1.4	Evaluate Curriculum Currency	Associate Deans, Department Chairs Academic Program Directors, UPC, GPC	\$1,000	Bi-Annual	Funded through Dean's Operations	
1.1.4.1	<i>Assess Programs with respect to Identified Strategic Assets and Core Educational Competencies</i>	<i>Associate Deans, Program Directors</i>	<i>None</i>	<i>2016-17</i>		
1.1.5	Complete Annual AoL Reports (including 'Closing the Loop' Narratives)	Associate Deans, Programs Directors, AoLC	\$15,000	Annual		
1.1.6	Grow and Sustain Advisory Boards	Associate Deans, Department Chairs, Academic Program Directors	\$10,000	Annual	Funded through individual Departmental budgets	
<b>1.2</b>	<b><u>University-mandated Program Reviews</u></b>					
1.2.1	Conduct University-mandated Program Reviews	Associate Deans, Academic Program Directors	None	Every 7 Years	Funds provided by University.	
1.2.1.1	<i>Set Program Review Schedule</i>	<i>Deans, Associate Deans, Academic Program Directors</i>	<i>None</i>	<i>2016-17</i>		
<b>1.3</b>	<b><u>Existing Program Development/Review</u></b>					
1.3.1	Implement New MBA Curriculum (for Fall 2017 Launch)	AD-Grad, MBA Program Director, Department Chairs	\$50,000 \$25,000	2016-17 2017-18	Funded through Program Fees and University Funds	

Steps	Actions/Goals	Responsibility	Resources	Time Frame	Notes	Completed
1.3.2	Review EMBA Program Curriculum	AD-Grad, Assistant Dean, EMBA Curriculum Committee, GPC	None	2016-17		
1.3.3	Implement Full-time Nonprofit Management [MNA] Program (Fall 2016 Start)	AD-Grad, Academic Program Director	\$56,000	2016-17	Departmental Budget	
1.3.3.1	Hire Full-time Faculty Member [MNA]	Dean, Academic Program Director	\$150,000	2017-18	See Table 2b	
1.3.4	Assess MGEM Program Viability	Dean, AD-Grad, Academic Program Director, GPC	\$5,000	2016-17	See Table 2a	
1.3.5	Complete Revisions to BSBA Majors: Accounting, Business Administration, OBL (Organizational Behavior & Leadership)	AD-UG, Accounting and OLC Department Chairs, UPC	None	2016-17	Accounting is adding a new concentration in Accounting & Data Science (in partnership with Computer Science Department).	
1.3.6	Revitalize and Grow BSBA Honors Program	AD-UG, Academic Program Director	\$39,000	Annual	Resources represent annual funding committed to program.	
1.3.7	Right-size BSM Program; Review Curriculum and Format; Develop New Learning Outcomes	AD-UG, Director of Strategic Initiatives, UPC; AoLC	None	2016-17		
<b>1.4</b>	<b>New Program Development</b>					
1.4.1	Masters in Entrepreneurship & Innovation (Launch Fall 2017)	AD-Grad, EIS Department Chair	\$75,000	2016-17	Resources provided for marketing degree program.	
1.4.1.1	Hire Full-time Faculty Member	Dean, EIS Department Chair	\$150,000	2017-18	Funding through Rossi Chair Endowment.	
1.4.2	Continuing/Executive Education Programming: Create Task Force to Develop Recommendations	Dean, Assistant Dean, Task Force	\$5,000	2016-17	Executive Education; SVI Restricted Account	
1.4.3	Conduct Market Research for Masters in Marketing Research & Customer Insight	Dean, AD-Grad, Marketing Department Chair	\$15,000	2017-18		
<b>1.5</b>	<b>School/Program/Department Staffing and Budgets</b>					
1.5.1	Review Faculty Staffing Needs Across Departments	Deans, Department Chairs		Annual		
1.5.2	Review and Participate in Annual Budget Allocations (within USF and SOM)	Provost Office, Deans, Sr. Director for Finance, Department Chairs, Program Directors		Annual		

## Strategic Objective #2: Student Experiential Learning and Impact

Steps	Actions/Goals	Responsibility	Resources	Time Frame	Notes	Completed
<u>2.1</u>	<u>Student Quality/Mix</u>					
2.1.1	Continue to Attract Stronger Students from Diverse Backgrounds	Deans, Recruitment Director (Graduate), Strategic Enrollment Mgt. Division (UG)	\$459,000 \$509,000	2016-17 2017-18	2016-17 resources reflect School's responsibility for graduate student recruiting (\$246,000) and graduate programs marketing (\$213,000). 2017-18 resources reflect increase of \$50,000 to marketing budget. UG recruitment activities (and resources) are centralized within the university.	
<u>2.2</u>	<u>Job Placement</u>					
2.2.1	Review and Report Career Trends	Career Services Director (Graduate), Career Center (UG)	None	Annual		
2.2.2	<i>Develop Key Measures and Set Placement Targets; Collect Data</i>	<i>Deans, Career Services Director (Graduate), Career Center (UG)</i>	<i>\$2,500 \$1,000</i>	<i>2016-17 2017-18</i>	<i>Setting targets and collecting data to become an annual action item.</i>	
<u>2.3</u>	<u>Graduate Student Experiential Initiatives</u>					
2.3.1	Increase Internship Opportunities for Students	Dean, AD-Grad, Career Services Director (Graduate)	None	Annual	Use of Handshake software	
2.3.2	Support The Malloy Group (MBA Program Consulting Group)	Dean, Faculty Coordinator	\$10,000	Annual		
2.3.2.1	<i>Develop Self-Funding Model and/or Seek Gift for the Malloy Group</i>	<i>Dean, Development Office</i>	<i>\$50,000</i>	<i>2016-17</i>		
2.3.2.2	<i>Study Potential Growth Opportunities via Potential Clients (external) and with Other Academic Programs (internal)</i>	<i>Faculty Coordinator</i>	<i>None</i>	<i>2017-18</i>		
2.3.3	<i>Introduce and Support the Management Exercises in the MBA Program</i>	<i>MBA Program Director, Management Exercises Coordinator</i>	<i>\$20,000</i>	<i>2016-17 then Annual</i>	<i>Resources for materials and coordination. Resources will be an annual commitment.</i>	
2.3.4	Review Quality and Option Mix for Global Immersions	AD-Grad, Academic Program Directors, GPC	None	Annual		
2.3.5	<i>Review Practicum Potentialities; Develop Policies</i>	<i>AD-Grad, Academic Program Directors</i>	<i>None</i>	<i>2017-18</i>		

Steps	Actions/Goals	Responsibility	Resources	Time Frame	Notes	Completed
2.3.6	Host Salesforce Academy: January Intersession Boot Camp	AD-Grad & UG	None	Annual	Costs defrayed by student fees.	
<u>2.4</u>	<u>Undergraduate Student Experiential Exercises: Professional Edge Program</u>					
2.4.1	Secure Professional Edge Endowment	Dean, Development Office	\$500,000	2016-17		
2.4.1.1	Introduce and sustain Professional Edge	Dean, AD-UG	\$38,800 \$58,300	2016-17 2017-18	Annual funding for Professional Edge Program	
2.4.2	Introduce and Support the Management Exercises in the Professional Edge Program	AD-UG, Management Exercises Coordinator	\$20,000	2017-18 then Annual	Resources for materials and coordination.	
2.4.3	Increase Internship Opportunities for Students	Dean, AD-Grad, UG Program Office, Career Services Director (Graduate)	\$10,000	Annual		
2.4.4	Review Quality and Option Mix for Global Immersions	AD-UG, UPC	None	Annual	Review quality and option mix.	
2.4.4.1	Secure Accounting Global Immersion Gift	Dean, Development Office	\$115,000	2016-17		
2.4.5	Review Practicum Potentialities; Develop Policies	AD-UG, Department Chairs	None	2017-18		
2.4.6	Host Salesforce Academy: January Intersession Boot Camp	AD-UG	None	Annual	Costs defrayed by student fees.	
<u>2.5</u>	<u>Service Learning</u>					
2.5.1	Review Placement and Support for Undergraduate Service Learning Requirement	AD-UG, Department Chairs, UPC	None	2016-17	Students currently fulfill the service learning requirement in BUS 304 (Management & Organization Design) offered by the OLC Dept.	
<u>2.6</u>	<u>Student-Faculty Engagement</u>					
2.6.1	Sustain/Grow Student-Faculty Scholarship Opportunities	AD-AA, Faculty	\$70,000	Annual	University provides annual funds for research assistantships.	
<u>2.7</u>	<u>Course Fees</u>					
2.7.1	Review Course Fees Structure and Policies	Provost Office, Deans, Sr. Director of Finance, Department Chairs, Academic Program Directors	None	2016-17		

<b>Steps</b>	<b>Actions/Goals</b>	<b>Responsibility</b>	<b>Resources</b>	<b>Time Frame</b>	<b>Notes</b>	<b>Completed</b>
<u>2.8</u>	<u>Student Services/Orientations</u>					
2.8.1	Conduct Review of Student Services	AD-Grad, AD-UG, GSA Director; Undergraduate Office Directors	\$5,000	Bi-Annual	To be conducted in 2016-17.	
2.8.2	Review and Update UG and Graduate Orientations	Associate Deans, Program Directors	\$2,500	Bi-Annual	To be conducted in 2017-18.	



### Strategic Objective #3: Faculty and Staff Engagement

Steps	Actions/Goals	Responsibility	Resources	Time Frame	Notes	Completed
<b>3.1</b>	<b>Strategic Planning</b>					
3.1.1	Review Strategic Planning [SPC] Committee Membership	Dean, SPC	None	Annual		
3.1.2	Review School's Mission and Vision	SPC	None	At least every five years		
3.1.2.1	<i>Discuss Development of Statement of Values</i>	SPC	None	2016-17		
3.1.3	Review and Update Strategic Plan, including Priorities	SPC	\$1,000	Annual	SPC will meet at least once per semester annually. SPC will make (at least) one report annually to faculty and staff and to the Dean's Circle.	
3.1.4	Plan and Host School-wide Retreats/Conversations	SPC	\$15,000	Annual		
3.1.4.1	<i>Discuss Strategic Possibilities of the "Three Sector" Model</i>	SPC	None	2016-17		
3.1.5	Update Intranet and Website	SPC	None	As needed		
<b>3.2</b>	<b>Assurance of Learning</b>					
3.2.1	Review AoL Committee Membership	Dean, AoLC	None	Annual		
3.2.2	Monitor Accreditation Standards	AoLC	None	Annual		
3.2.3	Compile Program AoL Reports	AoLC, AD-Grad, AD-UG, Department Chairs, Academic Program Directors	\$30,000	Annual		
3.2.4	Discuss AoL Progress with Faculty, GPC, UPC	AoLC, GPC and UPC Co-Chairs	None	Annual		
3.2.5	Update Intranet and Website	AoLC	None	As needed		
<b>3.3</b>	<b>Faculty Research and Teaching, Staff Development</b>					
3.3.1	Support Faculty Research Endeavors (i.e., publications and presentations) and Participation in Academic and Professional Organizations	Dean, Faculty Development Committee [FDC]	\$470,000	Annual	Approximately \$300,000 provided from University central funds (pending current contract negotiations); remainder from Dean's Discretionary Funds.	
3.3.2	Support Research Spa	AD-AA, Faculty	\$5,000	Annual	School-wide faculty lunchtime presentations; scheduled monthly September through May.	
3.3.3	Track Faculty Participation in CRASE (Center for Research, Artistic and Scholarly Excellence) Activities	AD-AA, Faculty	None	Annual	A university-wide initiative open to faculty.	
3.3.4	Track Faculty Participation in CTE (Center for Teaching Excellence) Activities	AD-AA, Faculty	None	Annual	A university-wide initiative open to faculty.	
3.3.5	<i>Facilitate Salesforce Alliance: Train the Trainer</i>	Deans, Faculty	\$26,000	2016-17	<i>Train faculty who will participate in the Grad and UG Salesforce Academy Boot Camps.</i>	

Steps	Actions/Goals	Responsibility	Resources	Time Frame	Notes	Completed
3.3.6	Offer School and Department Workshop, Boot Camps	AD-AA, Department Chairs	\$10,000	Annual	Recent examples include HBR Case Workshop (School), HBR Senior Editor Presentation (Marketing Department), Mediating-Moderating Statistical Methods (OLC Department).	
3.3.7	<i>Review Faculty Qualifications; Provide Appropriate Guidance to Faculty Members Around Quality Standards for Acceptable Publication Outlets.</i>	FDC	None	2016-17		
3.3.8	Support Staff Development Opportunities	Dean, Admin. Program Directors	Variable	Annual	Some opportunities funded by University. School funds opportunities (estimated in excess of \$25,000) from unit/department budgets and Dean's funds.	
<b>3.4</b>	<b>Best Practices/Involvement</b>					
3.4.1	Review and Update Faculty and Staff Onboarding Practices, including New Faculty Orientation	Department Chairs, Academic Program Directors	\$1,000	Annual		
3.4.2	<i>Review School Awards and Recognition Policies and Procedures</i>	Deans, FGC	None	2016-17	<i>Task Force to develop recommendations for policies and procedures for School awards. School already commits \$5,000 annually for awards and recognition.</i>	
3.4.3	Review of Promotion & Tenure Process; Disseminate Standards to Faculty	Dean, Peer Review Committee	None	Annual		
3.4.4	Ensure Process Consistency of Staff Development and Performance Appraisals	Deans, Admin. Program Directors	None	Annual	Deans and Administrative Program Directors will meet annually prior to annual performance appraisal period.	
3.4.5	Review of FGC, FDC, UPC, GPC Policies and Procedures	Dean, Committee (Co-)Chairs	None	Annual		
3.4.5.1	<i>Develop Meeting Guidelines Document</i>	Deans, FGC	None	2016-17	<i>FGC to develop a meeting guidelines/expectations document for the school.</i>	
<b>3.5</b>	<b>Two-Year Course Schedule</b>					
3.5.1	<i>Implement Two-Year Course Schedule</i>	Associate Deans, Department Chairs, Academic Program Directors	None	2016-18		

## Strategic Objective #4: Business and Community Engagement

Steps	Actions/Goals	Responsibility	Resources	Time Frame	Notes	Completed
<b>4.1</b>	<b>Programs/Initiatives</b>					
4.1.1	Secure Gift for China Business Studies Initiative	Dean, Program Director, Advisory Board	\$500,000	2016-18	Develop proposal; donors identified; and fundraising	
4.1.2	Create Infrastructure, Develop Programing for Harari Center for Conscious Leadership & Social Innovation (then sustain 2017-18 and beyond)	Dean, Program Director	\$100,000	2016-17 then Annual	School received \$1,000,000 endowment. \$55,000 from endowment; \$45,000 from Dean's Discretionary Funds.	
4.1.3	Secure Gift for Center for Sustainable Social Impact	Dean, Program Director	\$575,000	2016-17	Seeking gift to endow CSSI.	
4.1.4	Grow Silicon Valley Immersion Program	AD-Grad, Assistant Dean, SVI Program Manager	\$65,000	Annual	Base budgeted	
<b>4.2</b>	<b>Business and Organization Alliances</b>					
4.2.1	Develop Academic Alliances with Businesses and Organizations	Deans, Program Directors	None	Annually	Example: Salesforce Academic Alliance (see Actions/Goals 2.3.6, 2.4.6, 3.3.6).	
<b>4.3</b>	<b>Stakeholders</b>					
4.3.1	Grow and Sustain Speakers Series	Dean, Program Directors, Faculty	\$40,000	Annually	Current Speaker Series include the Masters in Marketing Award & Speaker Series; the OD Edge Speakers Series	
4.3.1.1	Implement and Grow Silk Speaker Series	Dean	\$90,000	Annually	Funded by \$2 million endowment.	
4.3.1.4	Develop Harari Center for Conscious Leadership & Social Innovation Speaker Series	CCLSI Program Director	See 4.1.2	2016-17		
4.3.2	Increase Alumni Outreach (based on established targets)	Deans, Department Chairs, Program Directors, Development Office	\$100,000	Annually	37 alumni events in fiscal year 2015. \$20,000 increase in 2017-18.	
4.3.2.1	Increase Alumni Volunteering as Alumni Ambassadors	Dean, Development Office	\$5,000	2016-17		
<b>4.4</b>	<b>Executive-in-Residence &amp; Executive Fellows</b>					
4.4.1	Grow and sustain In-Residence & Fellows Programs	Dean	\$44,000	Annually		
<b>4.5</b>	<b>Fundraising</b>					
4.5.1	Increase Student Scholarships (UG and Graduate Levels)	Dean, Develop. Office	\$500,000	Annually	Donors identified and proposal under negotiation;	
4.5.2	Increase Endowed Faculty Chairs	Dean, Develop. Office	\$5,000,000	Annually		
<b>4.6</b>	<b>AACSB</b>					
4.6.1	Sustain Participation at AACSB-sponsored Conferences and Seminars	Deans	\$30,000	Annually		

**Table 2a. Strategic Plan Annual Funding Allocations, 2016-17**

Steps	Actions/Goals	Allocation 2016-17	Source: Currently Budgeted	Source: New Budget Allocation	Source: Endowed/Dean's Discretionary Funds/Restricted Accounts; University Funds
1.1	<u>Program Measures/Reports</u>				
1.1.5	Complete Annual AoL Reports (including 'Closing the Loop' Narratives)	\$15,000	\$15,000		
1.1.6	Grow and Sustain Advisory Boards	\$10,000	\$10,000		
1.3	<u>Existing Program Development/Review</u>				
1.3.1	Implement New MBA Curriculum (First-Year Courses)	\$50,000	\$50,000		
1.3.3	Implement Full-Time MNA Program	\$56,000	\$56,000		
1.3.4	Assess MGEM Program Viability	\$5,000	\$5,000		
1.3.6	Revitalize and Grow BSBA Honors Program	\$39,000	\$39,000		
1.4	<u>New Program Development</u>				
1.4.1	Masters in Entrepreneurship & Innovation (Launch Fall 2017)	\$75,000		\$75,000	
1.4.2	Continuing/Executive Education Programming: Create Task Force to Develop Recommendations	\$5,000			\$5,000
2.1	<u>Student Quality Mix</u>				
2.1.1	Continue to Attract Stronger Students from Diverse Backgrounds (Graduate)	\$459,000	\$459,000		
2.2	<u>Job Placement</u>				
2.2.2	Develop Key Measures and Set Placement Targets; Collect Data	\$2,500		\$2,500	
2.3	<u>Graduate Student Experiential Initiatives</u>				
2.3.2	Strengthen the Malloy Group (MBA Program Consulting Group)	\$10,000			\$10,000
2.3.3	Introduce the Management Exercises in MBA Program	\$20,000			\$20,000
2.4	<u>Undergraduate: Professional Edge</u>				
2.4.1.1	Introduce and sustain Professional Edge	\$38,800	\$28,800		\$10,000
2.4.3	Increase Internship Opportunities for Students	\$10,000			\$10,000
2.6	<u>Student-Faculty Engagement</u>				
2.6.1	Sustain/Grow Student-Faculty Scholarship Opportunities	\$70,000	\$70,000		
2.8	<u>Student Services/Orientations</u>				
2.8.1	Conduct Review of Student Services	\$5,000		\$5,000	
3.1	<u>Strategic Planning</u>				
3.1.3	Review and Update Strategic Plan, including Priorities	\$1,000	\$1,000		
3.1.4	Plan and Host School-wide Retreats/Conversations	\$15,000	\$15,000		
3.2	<u>Assurance of Learning</u>				
3.2.3	Compile Program AoL Reports	\$30,000	\$30,000		
3.3	<u>Faculty Research and Teaching, Staff Development</u>				
3.3.1	Support Faculty Research Endeavors (i.e., publications and presentations) and Participation in Academic and Professional Organizations	\$470,000	\$275,000 (pending contract negotiations)		\$195,000
3.3.2	Support Research Spa	\$5,000			\$5,000
3.3.5	Hold Salesforce Alliance: Train the Trainer	\$26,000			\$26,000
3.3.6	Offer School and Department Workshops, Boot Camps	\$10,000			\$10,000

<b>Steps</b>	<b>Actions/Goals</b>	<b>Allocation 2016-17</b>	<b>Source: Currently Budgeted</b>	<b>Source: New Budget Allocation</b>	<b>Source: Endowed/Dean's Discretionary Funds/Restricted Accounts; University Funds</b>
<b>3.4</b>	<b><u>Best Practices/Involvement</u></b>				
3.4.1	Faculty and Staff Onboarding Practices, including New Faculty Orientation	\$1,000	\$1,000		
<b>4.1</b>	<b><u>Programs/Initiatives</u></b>				
4.1.2.1	Create Infrastructure, Develop Programming for Harari Center for Conscious Leadership & Social Innovation Create Infrastructure	\$100,000			\$100,000
4.1.4	Grow Silicon Valley Immersion Program	\$65,000	\$65,000		
<b>4.3</b>	<b><u>Stakeholders</u></b>				
4.3.1	Grow and Sustain Speakers Series	\$40,000			\$40,000
4.3.1.1	Implement and Grow Silk Speaker Series	\$90,000			\$90,000
4.3.2	Increase Alumni Outreach (based on established targets)	\$100,000	\$100,000		
4.3.2.1	Increase Alumni Volunteering as Alumni Ambassadors	\$5,000		\$5,000	
4.4	Executive-in-Residence & Executive Fellows Grow and sustain In-Residence & Fellows Programs	\$44,000			\$44,000
<b>4.6</b>	<b><u>AACSB</u></b>				
4.6.1	Sustain Participation at AACSB-sponsored Conferences and Seminars	\$30,000	\$30,000		
	<b>Total</b>	<b>\$1,902,000</b>	<b>\$1,249,800</b>	<b>\$87,500</b>	<b>\$565,000</b>

**Table 2b. Strategic Plan Annual Funding Allocations, 2017-18**

Steps	Actions/Goals	Allocation 2017-18	Source: Currently Budgeted	Source: New Budget Allocation	Source: Endowed/Dean's Discretionary Funds/Restricted Accounts; University Funds
<u>1.1</u>	<u>Program Measures/Reports</u>				
1.1.1	Assess Market Position	\$20,000	\$20,000		
1.1.4	Evaluate Curriculum Currency	\$1,000			\$1,000
1.1.5	Complete Annual AoL Reports (including 'Closing the Loop' Narratives)	\$15,000	\$15,000		
1.1.6	Grow and Sustain Advisory Boards	\$10,000	\$10,000		
<u>1.3</u>	<u>Existing Program Development/Review</u>				
1.3.1	Implement New MBA Curriculum (Second-year Courses)	\$25,000	\$25,000		
1.3.3.1	Hire Nonprofit Management [MNA] Full-time Faculty Member	\$150,000		\$150,000*	
1.3.6	Revitalize and Grow BSBA Honors Program	\$39,000	\$39,000		
<u>1.4</u>	<u>New Program Development</u>				
1.4.1.1	Hire Entrepreneurship & Innovation Full-time Faculty Member	\$150,000			\$150,000 (Rossi Chair)
1.4.3	Conduct Market Research for Masters in Marketing Research and Customer Insight	\$15,000	\$15,000		
<u>2.1</u>	<u>Student Quality Mix</u>				
2.1.1	Continue to Attract Stronger Students from Diverse Backgrounds	\$509,000	\$509,000		
<u>2.2</u>	<u>Job Placement</u>				
2.2.2	Develop Key Measures and Set Placement Targets; Collect Data	\$1,000	\$1,000		
<u>2.3</u>	<u>Graduate Student Experiential Initiatives</u>				
2.3.2	Strengthen The Malloy Group (MBA Program Consulting Group)	\$10,000			\$10,000
2.3.3	Sustain The Management Exercises	\$20,000			\$20,000
<u>2.4</u>	<u>Undergraduate: Professional Edge</u>				
2.4.1.1	Introduce and sustain Professional Edge	\$58,300	\$28,300		\$30,000
2.4.2	Introduce the Management Exercises in Professional Edge Program	\$20,000			\$20,000
2.4.3	Increase Internship Opportunities for Students	\$10,000			\$10,000
<u>2.6</u>	<u>Student-Faculty Engagement</u>				
2.6.1	Sustain/Grow Student-Faculty Scholarship Opportunities	\$70,000	\$70,000		
<u>2.8</u>	<u>Student Services/Orientations</u>				
2.8.2	Review and Update UG and Graduate Orientations	\$2,500		\$2,500	
<u>3.1</u>	<u>Strategic Planning</u>				
3.1.3	Review and Update Strategic Plan, including Priorities	\$1,000	\$1,000		
3.1.4	Plan and Host School-wide Retreats/Conversations	\$15,000	\$15,000		
<u>3.2</u>	<u>Assurance of Learning</u>				
3.2.3	Compile Program AoL Reports	\$30,000	\$30,000		
<u>3.3</u>	<u>Faculty Research and Teaching, Staff Development</u>				
3.3.1	Support Faculty Research Endeavors (i.e., publications and presentations) and Participation in Academic and Professional Organizations	\$470,000	\$275,000 (pending contract negotiations)		\$195,000
3.3.2	Support Research Spa	\$5,000			\$5,000

<b>Steps</b>	<b>Actions/Goals</b>	<b>Allocation 2017-18</b>	<b>Source: Currently Budgeted</b>	<b>Source: New Budget Allocation</b>	<b>Source: Endowed/Dean's Discretionary Funds/Restricted Accounts; University Funds</b>
3.3.6	Offer School and Department Workshops, Boot Camps	\$10,000			\$10,000
<b>3.4</b>	<b>Best Practices/Involvement</b>				
3.4.1	Review and Update Faculty and Staff Onboarding Practices, including New Faculty Orientation	\$1,000	\$1,000		
<b>4.1</b>	<b>Programs/Initiatives</b>				
4.1.2.1	Sustain Harari Center for Conscious Leadership & Social Innovation Create Infrastructure; Develop Programming	\$100,000			\$100,000
4.1.4	Grow Silicon Valley Immersion Program	\$65,000	\$65,000		
<b>4.3</b>	<b>Stakeholders</b>				
4.3.1	Grow and Sustain Speakers Series	\$40,000			\$40,000
4.3.1.1	Implement and Grow Silk Speaker Series	\$90,000			\$90,000
4.3.2	Increase Alumni Outreach (based on established targets)	\$120,000	\$100,000		\$20,000
<b>4.4</b>	<b>Executive-in-Residence &amp; Executive Fellows</b>				
	Grow and sustain In-Residence & Fellows Programs	\$44,000			\$44,000
<b>4.6</b>	<b>AACSB</b>				
4.6.1	Sustain Participation at AACSB-sponsored Conferences and Seminars	\$30,000	\$30,000		
	<b>Total</b>	<b>\$2,146,800</b>	<b>\$1,249,300</b>	<b>\$152,500</b>	<b>\$745,000</b>

\*Formal allocation pending.

**TABLE 3. Strategic Plan Endowed Funding and Gift Initiatives**

<b>Steps</b>	<b>Actions/Goals</b>	<b>Funding Sought</b>	<b>Time Frame</b>
<u>2.3</u>	<u>Graduate Student Experiential Initiatives</u>		
2.3.2.1	The Malloy Group Endowment	\$50,000	2016-17
<u>2.4</u>	<u>Undergraduate: Professional Edge</u>		
2.4.1	Professional Edge Endowment	\$500,000	2016-17
2.4.4.1	Accounting Global Immersion Endowment	\$115,000	2016-17
<u>4.1</u>	<u>Programs/Initiatives</u>		
4.1.1	China Business Studies Initiative	\$500,000	2016-18
4.1.3	Center for Sustainable Social Impact	\$575,000	2016-18
<u>4.5</u>	<u>Fundraising</u>		
4.5.1	Increase Student Scholarships (UG and Graduate)	\$500,000	2016-18
4.5.2	Increase Endowed Faculty Chairs	\$5,000,000	2016-18
	<b>Total</b>	<b>\$7,240,000</b>	



## II. ASSURANCE OF LEARNING

### ASSURANCE OF LEARNING PROCESS

The idea of expanding assessment responsibility in the School of Management started soon after the peer review team departed. In April 2016, we brought in Linda Leon, PhD., Assessment Director for Loyola Marymount University (LMU), to consult with us about our structure and processes for Assurance of Learning. Dr. Leon immediately identified some issues, such as a lack of authority, that could arise with the proposed structure of organizing AoL subcommittees for the two existing curriculum committees. Therefore, the idea of having a committee separate from the curriculum committees (modeled after LMU) with representatives from relevant teaching areas common to all programs was developed. The members of this new committee engage the faculty in their areas of expertise in order to create a culture of accountability and widespread faculty discussion of student learning.

The membership of the committee is for a period of three years. AoL Committee members meet with faculty colleagues in their area of expertise. They discuss learning outcomes, rubrics, measuring instruments, assessment data and suggested actions. Committee members take assessment reports and data from indirect measures to their departments for discussion. Actions for curriculum changes are vetted and approved by the department and then taken to the respective undergraduate or graduate curriculum committee for further broad discussion. If approved by the curriculum committee, the changes are implemented. A list of committee members is included in Appendix D.

For the Bachelor of Science in Business Administration (BSBA) and Bachelor of Science in Management (BSM) programs, all AoL committee members come together to review learning outcome content, assessment reports, rubrics and measuring instruments. One faculty member on the AoL committee is a voting member of the Undergraduate Program Committee.

For the graduate programs, each program is responsible for its own curriculum and learning outcomes, but changes must be approved by the School's graduate program committee. One AoL committee member is involved in each program's curriculum group.

From May 2016 to August 2016, the AoL committee met on three separate occasions to review existing reports, program goals, learning outcomes, curriculum maps, and rubrics. The kickoff meeting occurred in May 2016. It was followed by an all day workshop on June 17<sup>th</sup> facilitated by Dr. Leon of LMU. Department Chairs, Program Directors and the Committee members took part in a morning "Nuts and Bolts" session. In the afternoon, the group work-shopped Learning Outcomes in their teaching area. On July 8<sup>th</sup>, the AoL committee met again and evaluated AY 15/16 assessment results and discussed implications of results, as well as weaknesses in assessment structure, LOs and rubrics. At the end of summer, individual committee members met with core course faculty in all undergraduate and graduate programs. Together they revised LOs where needed, constructed appropriate rubrics, updated curriculum maps, and identified assessment instruments within courses designated as ones in which the LOs are to be assessed. An assessment schedule is provided in the appendix. On September 1<sup>st</sup>, the committee met to discuss and finalize wording of all BSBA learning outcomes, and to review additional AY 15/16 assessment reports.

The five Assurance of Learning concerns as outlined in the Continuous Improvement Review Committee's letter are:

1. Develop comprehensive direct measure assurance of learning plans for all programs. Each plan should indicate the program's learning outcomes; the assessment activities, measures, and standards to measure the learning outcome; assessment points, and the timeline for assessment. Assurance of learning measurements should be appropriate for assessing individual achievement of learning outcomes.
2. Update all program curriculum maps to indicate assessment points.
3. Develop a comprehensive indirect measures plan for all programs. Each plan should describe the indirect measures used and the scheduled rotation.
4. Complete scheduled AY 15/16 individual student direct measure assessments, reporting results in a consistent format that indicates recommendations and prepares for actions to be taken.
5. Execute plans to expand faculty representation on program assessment committees and provide evidence of broad discussions of assessment results.

The Assurance of Learning portion of the report is structured as follows: In the following section, we outline the improvements, and the direct and indirect measure assessment plans (points 1 and 3 above) by program. Subsequently, we report on our AY 15/16 completed assessments (point 4 above). In the appendix we will include all current curriculum maps (point 2) assessment schedules and rubrics for the direct measures plan. As this document demonstrates, faculty discussion and involvement in assessment and on program assessment committees is now comprehensive and we will continue to work to make it increasingly so (point 5).

## AOL IMPROVEMENTS, DIRECT AND INDIRECT ASSESSMENT PLAN, BY PROGRAM

The plans for all programs below were motivated by deficiencies discovered during the assessments undertaken in AY '15/'16 as noted in section IV, and from prior years. As part of our Continuous Improvement Plan, we have taken action (and closed the loop) not only on identified individual student performance as noted in section IV but also on learning goals and outcomes that were inconsistent with our School and University mission objectives and/or learning outcomes that were not directly measurable in current form. In addition to learning outcome changes we have identified and, in many cases, created course embedded instruments that will effectively assess our newly designed learning outcomes. All program learning outcomes are assessed on a two, three, or four year schedule, except for the Master of Global Entrepreneurial Management and Master of Science in Organization Development programs. Those two programs continue to assess every Learning Outcome yearly. Assessment schedules and curriculum maps for each program are included in appendix E.

### **BSBA Program**

All Learning Outcomes were reviewed between spring 2016 and fall 2016; all were updated and rewritten by the SOM AoL Committee in summer 2016 to be more measurable. The Undergraduate Programs Committee (UPC) reviewed and endorsed the updates on October 3, 2016 for AY 2016/2017 implementation.

Next year the AoL committee will review the assessment and number of learning outcomes to decide whether any will be condensed or eliminated.

Indirect measures for both the BSBA and BSM programs are administered and collected by the University Center for Institutional Planning and Effectiveness. Once data is collected, it is sent to the Deans within the School of Management. The findings are then shared and discussed with the AoL committee members who then work within their departments on any minor adjustments indicated needed by the surveys. The AoL committee will work with the University over the next year to see if any additional alumni or employer surveys can be added.

Assessment is intentionally front-loaded for AY 16-17 because our goal was to get as many faculty members and departments involved in establishing a solid AoL process as possible. The AoL committee will review and spread out the outcomes more evenly once all LOs have been assessed at least twice (after AY 17/18). The BSBA learning outcomes are assessed on a three-year cycle.

### **Program Goals and Learning Outcomes for 16/17:**

#### **Program Goal 1 – Develop Effective and Ethical Leadership Behaviors**

Learning Outcome: 01) Students will analyze the effective qualities of a leader using organizational behavior frameworks.

Learning Outcome: 02) Students will evaluate personal leadership capacities and areas for future personal growth.

Learning Outcome: 03) Students will identify and describe stakeholders across multiple sectors; connect ethical theory to stakeholder values; recognize and interpret societal context that influences stakeholders.

Learning Outcome: 04) Students will effectively communicate orally and in writing using various mediums across diverse situations.

#### **Program Goal 2 – Build Innovative and Creative Decision-Making Capabilities**

Learning Outcome: 05) Students will create, analyze, and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.

#### **Program Goal 3 – Demonstrate Knowledge of Fundamental Business Domain Concepts**

Learning Outcome: 06) Students will use accounting concepts and principles in creating and analyzing financial statements of organizations.

Learning Outcome: 07) Students will demonstrate ability to identify relevant information and apply specific knowledge and analysis skills to assess the economic value of real/financial assets or investment opportunities and make appropriate decision to create value.

Learning Outcome: 08) Students will work effectively in groups and foster positive team dynamics.

Learning Outcome: 09) Students will describe the intertwined relationship among technology, information, and the organizational structure and operations in order to assess and evaluate the core technology concepts that enable sound organizational decision making.

Learning Outcome: 10) Students will be able to identify the core concepts of marketing – price, product, place, and promotion.

Learning Outcome 11) Students will draw legal conclusions based on sound legal analysis; identify the elements of a valid, enforceable contract and defenses to contract formation; and, understand the nature and purposes of legal remedies.

Learning Outcome: 12) Students will develop specific and actionable strategic options to enhance the organization’s position through analysis of the changes in its competitive environment, its industry/sector, and its internal resources.

**Program Goal 4 – Develop a Strategic Entrepreneurial, and Global Mindset**

Learning Outcome: 13) Students will integrate diverse perspectives (e.g. cultural, religious, economic, political, historical, geographic, environmental) in decision-making.

<b>DIRECT MEASURES PLAN</b>				
<b>Learning Outcome</b>	<b>Assessment Point</b>	<b>Assessment Instrument</b>	<b>Measurement Method</b>	<b>Next Scheduled Assessment</b>
<b>01</b>	BUS 304	Individual Assessment Case Analysis Assignment in all sections.	Scored against rubric.	Fall 2016
<b>02</b>	BUS 304	Individual Assessment Case Analysis Assignment in all sections.	Scored against rubric.	Fall 2016
<b>03</b>	BUS 304	Course embedded short answer questions.	Scored against rubric.	Fall 2017
<b>04</b>	BUS 401/406	External Evaluator scores individual presentations against oral, content and delivery communication rubrics.	Scored against rubric.	Fall 2017
<b>05</b>	BUS 308	Course embedded simulation and essay.	Scored against rubric.	Fall 2019
<b>06</b>	BUS 201	Course embedded set of questions and problems.	Scored and binned by percentage with clear target.	Fall 2016
<b>07</b>	BUS 305	Course embedded set of questions and problems.	Scored and binned by percentage with clear target.	Fall 2016
<b>08</b>	BUS 304	Comprehensive Assessment for Team Member Effectiveness (CATME)	Scored against rubric.	Fall 2016
<b>09</b>	BUS 308	Course embedded set of questions and problems.	Scored and binned by percentage with clear target.	Fall 2016
<b>10</b>	BUS 302	Course embedded set of questions and problems.	Scored and binned by percentage with clear target.	Fall 2018

11	BUS 301	Set of 10 objective questions.	Scored and binned by percentage with clear target.	Fall 2016
12	BUS 401/406	Individual Presentations scored by external evaluators	Scored against rubric.	Fall 2017
13	BUS 401/406	Individual Assignment	Scored against rubric.	Fall 2017

<b>INDIRECT MEASURES PLAN</b>			
<b>Assessment Instrument</b>	<b>Description</b>	<b>Schedule</b>	<b>How does it inform our curriculum?</b>
NSSE Survey	Assesses student engagement through The College Student Report.	Annually	We are able to gauge participation rates for Service Learning, Internships, Study abroad and how we compare with other majors within the University.
Graduating Student Survey	Administered at graduation by Center for Institutional Planning & Effectiveness, Assessment Office	Annually in spring.	Indirect evidence about learning outcomes having to do with strategy, global mindset, and diverse perspectives.
Retention Rates	Tracked by Center for Institutional Planning & Effectiveness	Every census, fall & spring	High (low) rates provide some evidence of how students perceive the value of their education
Graduation rates	Tracked by Center for Institutional Planning & Effectiveness	Every census, fall & spring	Same as "retention rates" above
Alumni & Employer Surveys	Planned for administration by the University in spring 2018	Annually in spring.	AoL Committee will work with University administration on details.

## **BSM Program**

The Undergraduate Associate Dean and UPC faculty Co- Chair will lead an examination of the curriculum for the BSM program this Academic Year based on AY 15-16 assessment results and student feedback. The BSM learning outcomes are assessed on a three-year cycle.

During summer 2016, the Undergraduate Associate Dean visited BSM students at all branch campuses. Students were surveyed about what is and isn't working in the program, which launched in spring 2013. In addition to core changes that have already occurred (restructuring of BSM 309 and unit changes for BSM 303 and 306), students still feel that the classes are too short in duration and that course material in core courses needs to be further customized to the program.

On September 7, 2016, the UPC chairs and Associate Dean for Academic Affairs met and formulated recommendations. These included incorporating differences in Program Goals between the BSBA and BSM populations, changes to existing core course duration (BSM 309) and recommended new core courses in microeconomics, finance and a capstone. The UPC endorsed the updated Program Goals and Learning Outcomes on October 3, 2016 and formed a small team of UPC members to review and make curriculum revisions for fall 2017. This task

force has convened twice during the fall semester and developed a proposal for curriculum revision that increases coverage of the domain concepts as outlined in the LOs. On December 5, 2016, the UPC voted to endorse the updated curriculum, which includes new core economics, finance, strategy courses, and a capstone, for fall 2017 pending agreement of the OLC and FIN departments.

## **Program Goals and Learning Outcomes for 16/17:**

### **Program Goal 1 – Be Effective and Ethical Leaders**

Learning Outcome: 01) Students will analyze the effective qualities of a leader using organizational behavior frameworks.

Learning Outcome: 02) Students will evaluate personal leadership capacities and areas for future personal growth.

Learning Outcome: 03) Students will identify and describe stakeholders across multiple sectors; connect ethical theory to stakeholder values; recognize and interpret societal context that influences stakeholders.

Learning Outcome: 04) Students will effectively communicate orally and in writing using various mediums across diverse situations.

### **Program Goal 2 – Be an Innovative and Creative Decision-Maker**

Learning Outcome: 05) Students will create, analyze, and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.

### **Program Goal 3 –Be able to apply Fundamental Domain Concepts**

Learning Outcome: 06) Students will use accounting concepts and principles in creating and analyzing financial statements of organizations.

Learning Outcome: 07) Students will demonstrate ability to identify relevant information and apply specific knowledge and analysis skills to assess the economic value of real/financial assets or investment opportunities and make appropriate decision to create value.

Learning Outcome: 08) Students will work effectively in groups and foster positive team dynamics.

Learning Outcome: 09) Students will describe the intertwined relationship among technology, information, and the organizational structure and operations in order to assess and evaluate the core technology concepts that enable sound organizational decision making.

Learning Outcome: 10) Students will be able to identify the core concepts of marketing – price, product, place, and promotion.

Learning Outcome 11) Students will draw legal conclusions based on sound legal analysis; identify the elements of a valid, enforceable contract and defenses to contract formation; and, understand the nature and purposes of legal remedies.

Learning Outcome: 12) Students will develop specific and actionable strategic options to enhance the organization’s position through analysis of the changes in its competitive environment, its industry/sector, and its internal resources.

**Program Goal 4 – Develop a Strategic Entrepreneurial, and Global Mindset**

Learning Outcome: 13) Students will integrate diverse perspectives (e.g. cultural, religious, economic, political, historical, geographic, environmental) in decision-making.

<b>DIRECT MEASURES PLAN</b>				
<b>Learning Outcome</b>	<b>Assessment Point</b>	<b>Assessment Instrument</b>	<b>Measurement Method</b>	<b>Next Scheduled Assessment</b>
01	BSM 304	Individual Assessment Case Analysis Assignment in all sections.	Scored against rubric.	Spring 2018
02	BSM 304	Individual Assessment Case Analysis Assignment in all sections.	Scored against rubric.	Spring 2018
03	BSM 303, Pre-test BSM 309, Post-test	CBE Exam	Target score of 75%.	Spring 2016
04	INTD 310	Individual Written Assignment – Analytical Essay	Scored against rubric	Spring 2017
05	BSM 303	Course embedded simulation and essay.	Scored against rubric.	Spring 2017
06	BSM 303, Pre-test BSM 309, Post-test	CBE Exam	Target score of 75%.	Spring 2016
07	BSM 303, Pre-test BSM 309, Post-test	CBE Exam	Target score of 75%.	Spring 2016
08	BSM 303, Pre-test BSM 309, Post-test	CBE Exam	Target score of 75%.	Spring 2016
09	BSM 306	Course embedded set of questions and problems.	Scored against rubric.	Spring 2017
10	BSM 303, Pre-test BSM 309, Post-test	CBE Exam	Target score of 75%.	Spring 2016
11	BSM 303, Pre-test BSM 309, Post-test	CBE Exam	Target score of 75%.	Spring 2016
12 <sup>1</sup>	BSM 4XX	Prototype Strategy Capstone	Scored against rubric	Summer 2017
13 <sup>1</sup>	BSM 4XX	Strategy Capstone	Scored against rubric	Summer 2017

<b>INDIRECT MEASURES PLAN</b>			
<b>Assessment Instrument</b>	<b>Description</b>	<b>Schedule</b>	<b>How does it inform our curriculum?</b>
Graduating Student Survey	Administered at graduation by Center for Institutional Planning &	Annually in spring	Indirect evidence about learning outcomes having to do with strategy, global mindset, and diverse perspectives.

	Effectiveness, Assessment Office		
Retention Rates	Tracked by Center for Institutional Planning & Effectiveness	Every census, fall & spring	High (low) rates provide some evidence of how students perceive the value of their education
Graduation rates	Tracked by Center for Institutional Planning & Effectiveness	Every census, fall & spring	Same as “retention rates” above
Alumni & Employer Surveys	Planned for administration by the University in spring 2018	Annually in spring.	AoL Committee will work with University administration on details.

**MBA Program**

Over the past year, the MBA program has undergone a substantial redesign. The final cohort of the existing MBA program entered in fall 2016 and will be taught out. The new MBA program will launch in fall 2017.

We first present (Part 1) our plan for the remaining assurance of learning activities in the existing MBA program and how we will connect those to the new curriculum. The subsequent section (Part 2) discusses the new MBA program; explains how assessment findings from the existing program informed the design of the new program; and provides our plan for how assurance of learning will be built in to the new MBA program, with details of organization, leadership, and process.

**MBA ASSURANCE OF LEARNING PART 1: THE EXISTING MBA PROGRAM**

**Timeline for the Existing MBA Program as it Teaches Out**

The final FT cohort in the existing MBA program started classes in fall 2016 and will continue under the existing program goals and learning outcomes. These students will complete the existing FT MBA program in spring 2018. The final PT cohort in the existing MBA program started classes in fall 2016. They are scheduled to complete their program in spring 2019.

**Assurance of Learning in AY 17/18 for Existing MBA Program**

In AY 16/17, for the existing MBA program, we will continue with a full set of AOL activities. Assessment instruments are designed such that results will be applicable to the new program. Although specific LOs for the new program are different (see below), assessment results for existing LOs will be mapped to new LOs, and appropriate loop closing activities will be undertaken.

**Existing MBA Program Goals and Learning Outcomes:**

**Program Goal 1 - Demonstrate ability to apply theoretical constructs to “real world” applications to solve problems**

Learning Outcome: 02) Practical Problems

Students will apply theory to solve practical problems.



Learning Outcome: 06) Strategic Plans  
Students will formulate and execute strategic plans.

**Program Goal 2 - Demonstrate effective communication and leadership skills in a business environment**

Learning Outcome: 01) Fundamental Language and Skills  
Students will display mastery of the fundamental language and skills of core business areas.

Learning Outcome: 05) Leadership and Communication Skills  
Students will possess effective leadership and communication skills & strategies.

**Program Goal 3 - Demonstrate effectiveness in analyzing ethical and societal concerns in a business environment**

Learning Outcome: 03) Business Environment  
Students will measure, analyze and interpret all aspects of the business environment.

Learning Outcome: 04) Legal, Ethical and Social Concerns  
Students will integrate legal, ethical and social concerns into business decisions.

**Summary of AY 15/16 Assessment, and Changes made for AY 16/17 (Closing the Loop)**

A review of AY 15/16 assessments is provided in the summary table on page 50. We will also perform a full review of changes made in response to assessment and insure they are adequately documented, and will seek opportunities to make additional changes.

A key finding from AY 15/16 assessment is that the linkages between the review undertaken in the summer and possible actions taken by faculty in response need to be strengthened and/or better documented. We address going forward in the new MBA Program described in Part 2.

**Assessment in AY 16/17**

In AY 16/17 we will perform the planned assessments of those learning outcomes not assessed in AY 15/16 (LOs 1, 3 and 6). We found the assessment of LO 2 in AY15/16 to be unsatisfactory because of a lack of depth in data and overall assessment. We will reassess in AY 16/17.

The fall 2015 and spring 2016 exit surveys, administered at graduation, received responses from 89 percent of the MBA FT and PT student population. The FT MBA Graduation Survey showed that 73 percent of the reporting graduates received a 50 percent or higher increase in salary after completing the MBA program, and that 76 percent of the students were likely or very likely to recommend the program to others. The PT survey showed a similar satisfaction rate of 74 percent of the students being very likely or likely to recommend the program to others, and 83 percent of the part-time students reported a 20 percent or higher increase after completing the MBA.

AY 15/16 and 16/17 assessment will be used to inform creation of the core for the new MBA curriculum.

DIRECT MEASURES PLAN (existing Learning Outcomes)				
Learning Outcome	Assessment Point	Assessment Instrument	Measurement Method	Next Scheduled Assessment
1	MBA 6015	Embedded questions from final exam.	Students binned with percentage target.	Fall 2016
2	MBA 6607	Embedded questions from midterm exam.	Students binned with percentage target.	Last assessed in AY 15/16. Reassess in 16/17
3	Integrative Exercise	Business Plan	External Evaluator scores against rubric.	Fall 2016
4	MBA 6012	Case study with two individual written assignments.	Scored against rubric.	Last assessed in AY 15/16. New LOs as of AY 17/18.
5	MBA 6013	Final Project Presentation, content and delivery.	External Evaluator scores against rubric.	Last assessed in AY 15/16. New LOs as of AY 17/18.
6	MBA 6014	Course embedded assignment.	Scored against rubric.	Fall 2016

INDIRECT MEASURES PLAN			
Assessment Instrument	Description	Schedule	How does it inform our curriculum?
New Student Survey	Measures efficacy of orientation and student on-boarding	Start of every fall semester.	Gauges the satisfaction of students entering the program which can influence their academic performance.
Integrative Exercise	Students are surveyed at the end of the simulation about the experience.	Every fall semester.	How well are we integrating functional area curricula?
MBA Advisory Group	Four active members of the USF MBA alumni, one existing MBA student, one full-time faculty member, the Directors of the Career Management and Admissions teams, and a senior member of the USF SOM administrative team meet.	Three times per year. Once in fall and twice in spring.	Charged with Improving stakeholder engagement, identifying Program focus, clarifying market opportunities, and formulating student recruitment and career outcome strategies.
Retention Rates	Tracked by Center for Institutional Planning & Effectiveness	Every census date, fall and spring.	High (low) rates provide some evidence of how students perceive the value of their education
Exit survey	Required survey on program satisfaction administered by Graduate Student Advising Office when students pick up their cap and gown.	Every graduation, fall and spring.	Provides information on what's working well and what needs improvement. This data is presented to the faculty who then incorporate findings to make changes in the program
MBA Job placement/ alumni survey	Students are surveyed for their employment status upon graduation and at 3-months post-graduation.	Every May	Addresses how well we prepare our students for employment

## **MBA ASSURANCE OF LEARNING PART 2: THE NEW MBA PROGRAM**

The key element of AoL for the new MBA program is that the School is for the first time allocating resources to establish a new faculty organization with faculty leadership to take responsibility for MBA assessment, working in close coordination with the MBA Director.

### **Timeline for the New MBA Program**

The new MBA program was designed by a faculty task force in 2015-16, working closely with MBA Director Frank Fletcher. The task force proposed an innovative new program structure with many new elements, and leaves virtually nothing unchanged compared to the old program. In May 2016, the structure of the new MBA program was approved by the Graduate Program Committee and endorsed by a vote of the faculty of the School of Management. In Summer 2016, a new set of MBA program goals and learning outcomes were articulated by the faculty AoL Committee. These program goals and learning outcomes will be incorporated into curriculum design of the new MBA program.

The new program is in the process of being “built out” in 2016-17, and the first students will begin in fall 2017. The development of the new program is an opportunity to develop courses in light of program goals and learning outcomes that are articulated in advance of detailed course design, and to “bake in” program-level thinking and assessment from the beginning.

Because this is a new program with new program goals and learning outcomes, the description of assessment activities is necessarily forward-looking. We are excited by two significant developments in our ability to perform assessment. These are firstly, the creation of a sustainable faculty group under faculty leadership that will have a “program level” perspective and responsibility for assessment and secondly, the creation of courses and assessment infrastructure simultaneously, based on a new set of program goals and learning outcomes. The new learning outcomes will be assessed over a two-year cycle.

Additional information about the new MBA program structure and organization of assurance of learning can be found in appendix F.

### **New MBA Program Goals and Learning Outcomes**

The MBA Director and faculty teaching in the MBA program, with consultation from the AoL Committee, have articulated a draft set of Program Goals and Learning Outcomes. The Learning Outcomes have been carefully designed to be measurable. The draft Program Goals and Learning Outcomes will be finalized by the MBA Implementation Team at the end of fall 2016. Because of the inclusive process used to develop them, we anticipate few changes.

The draft Program Goals and Learning Outcomes are as follows.

#### **Program Goal 1 – Graduates will be creative problem solvers**

Learning Outcome 1) Functional Expertise

Students will defend their position on a business decision/problem through deep knowledge of a specific functional area(s)

Learning Outcome 2) Integrative Ability

Students will design a business strategy incorporating concepts from multiple functional areas

Learning Outcome 3) Critical Thinking

Students will challenge assumptions and establish a process to appraise competing perspectives

Learning Outcome 4) Handling ambiguity

Students will interpret ambiguous information and formulate succinct solutions

**Program Goal 2 Graduates will be authentic leaders**

Learning Outcome 5) Leadership Communication

Students will develop a leadership and communication style that is authentic, effective, and persuasive

Learning Outcome 6) Collaborative Spirit

Students will value diverse perspectives, inspire collaboration, and maximize collective abilities

**Program Goal 3 Graduates will be ethical and socially-aware managers**

Learning Outcome 7) Ethical and Social Sensitivity

Students will identify the ethical and social implications of a business problem

Learning Outcome 8) Ethical and Social Engagement

Students will formulate appropriate and compassionate responses to ethical and social concerns

## **EMBA Program**

The EMBA Curriculum Committee was created in March 2016. The committee met twice during the 2015-16 academic year at which time it decided unanimously to revise the EMBA program's learning outcomes with the stated intent to create (1) no more than 10 learning outcomes relevant to the program; (2) learning outcomes reflective of higher-order learning "action" verbs (e.g., analyzing, evaluating, and creating); and (3) learning outcomes that measure individual student learning via direct measures. The learning outcomes for the EMBA will be assessed over a three-year cycle.

In early August, the draft learning outcomes were sent to all EMBA faculty who taught during the 2015-16 academic year or were scheduled to teach during the 2016-17 academic year. The instructors were asked to review the proposed learning outcomes and to complete the curriculum map (see EMBA Curriculum Map), noting whether a given learning outcome was referenced, reinforced, or emphasized for each course s/he taught.

After aggregating the EMBA faculty information, the EMBA Curriculum Committee then met in late August to finalize the learning outcomes and review the curriculum map. Based on the curriculum map, the committee established the assessment point (including the academic year of assessment) for each learning outcome. Before being vetted by school's AoL Committee and

Graduate Program Committee, the AoL assessment plan was again reviewed by the EMBA faculty.

In an effort to expand indirect measures within the program, in spring 2016, Career Services implemented the exit survey for the EMBA students. With a 100 percent response rate, 88 percent of the students said they were likely or very likely to recommend the program to others. Additionally, 28 percent of the reporting graduates received a 40 percent or higher increase in their salary after completing the program. We will use these numbers as a benchmark for comparison when future survey data is collected.

### Program Goals and Learning Outcomes for 2016/2017:

#### **Program Goal 1: Leadership. Graduates will be self-aware leaders committed to collaboration.**

Learning Outcome 01) Discuss how self-awareness is central to leadership authenticity and effectiveness.

Learning Outcome 02) Assess team effectiveness for improved performance.

Learning Outcome 03) Communicate effectively in writing.

Learning Outcome 04) Communicate effectively orally.

#### **Program Goal 2: Decision Making. Graduates will be creative problem solvers and strategic decisions makers.**

Learning Outcome 05) Apply tools, models, and concepts of innovation to a business venture.

Learning Outcome 06) Design fresh options for a product, process, system, or service.

Learning Outcome 07) Analyze data/information to inform strategic decision making.

#### **Program Goal 3: Global Social Responsibility. Graduates will be ethically and socially aware and attuned to the global environment.**

Learning Outcome 08) Assess the potential ethical implications of a business decision.

Learning Outcome 09) Evaluate the Impact of business decisions on the well-being of stakeholders, including the local and global environment.

#### **Program Goal 4: Foundational Business Knowledge. Graduates will be knowledgeable in the foundational business disciplines.**

Learning Outcome 10) Interpret the theories and principle features of the core business disciplines – accounting, finance, management, marketing, economics, business law, strategy, and operations.

DIRECT MEASURES PLAN				
Learning Outcome	Assessment Point	Assessment Instrument	Measurement Method	Next Scheduled Assessment
01	eMBA 6902	Individual Paper assignment	Scored against rubric.	Fall 2017
02	eMBA 6919	Course embedded assignment	Scored against rubric.	Fall 2017
03	eMBA 6997	Individual Paper assignment	Scored against rubric.	Fall 2016
04	eMBA 6907	Individual Assignment	Scored against rubric.	Fall 2017
05	eMBA 6917	Individual Assignment	Scored against rubric.	Spring 2019
06	eMBA 6920	Individual Applied Innovation Plan	Scored against rubric.	Fall 2016
07	eMBA 6912	Individual Assignment	Scored against rubric.	Spring 2019
08	eMBA 6915	Individual Paper assignment	Scored against rubric.	Fall 2018
09	eMBA 6997	Individual Paper assignment	Scored against rubric.	Fall 2016
10	Pre-Test Post-test	Exam administered at start and end of program	Scored with percentage target as goal.	Fall 2017 (Re-test cohort in Spring 2019)

INDIRECT MEASURES PLAN			
Assessment Instrument	Description	Schedule	How does it inform our curriculum?
Career Advancement	Students notify program director or manager of promotions and career growth during the course of the program.	On-going.	A measure of the value of the curriculum.
Intake Survey	Measures on-boarding process.	At start of program.	Measure of student satisfaction.
Mid-program survey	Survey about program satisfaction/	After first year of program.	Provides information on what's working well and what needs improvement. This data is presented to the faculty who then incorporate findings to make changes in the program.
Post Global Trip Survey	Students are surveyed about the experience.	After GBP.	Student perception of learning in global practicum; recommendations used to improve experience.
Exit survey	Required survey on program satisfaction administered by Graduate Student Advising Office when students pick up their cap and gown.	Every graduation, fall and spring.	Provides information on what's working well and what needs improvement. This data is presented to the faculty who then incorporate findings to make changes in the program

## **MSOD program**

For the Master of Organization Development (MSOD) program, learning outcomes are assessed in the Culminating Project class. In this class, students have the opportunity to employ learning from each of their previous courses as they work in their student teams and with their client organizations. Through the team OD project, students integrate research with theory and practice by conducting an organizational change diagnostic case study and/or intervention evaluation with a client of their choosing.

Two class assignments were used for the assessment of learning outcomes. The first was the team culminating project presentation and the second was the team culminating project paper. Teams presented their culminating project to a panel of experts (both academics and practitioners) and all 10 learning outcomes were assessed on a 5-point rubric. An outside evaluator, familiar with the class and program through adjunct teaching, assessed the team project papers. This evaluator used the same learning outcomes rubric that was used for the presentations.

The culminating project presentation was evaluated by five evaluators: three evaluators were instructors in the program and two were OD practitioners. An additional external evaluator, who has worked as an adjunct for the program, evaluated the team culminating project papers.

New for spring and fall 2016, is the addition of the exit survey administered at graduation by Career Services. The survey was completed by 90 percent of the graduates this year, 74 percent of whom said they are likely or very likely to recommend the program to others. Additionally, 68 percent of the reporting students received a salary increase after the completion of their degree. The AoL committee will work with the MSOD program director over the next year to see if any additional alumni or employer surveys can be added.

Program Goals and Learning Outcomes for 16/17:

### **Program Goal 1 - Understanding the Foundations, Theories and Models of OD**

Learning Outcome 01) Students will become familiar with the key concepts, research, theories and models in OD.

Learning Outcome 02) Students will apply OD theories and models to change interventions in organizations.

### **Program Goal 2 - Ability to Lead Change and Use Self-as-Instrument**

Learning Outcome 03) Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback, and implementing interventions adhering to the values and principles of OD practice.

Learning Outcome 04) Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care, and use their own feelings as valuable information about how the organization functions.

### Program Goal 3 - Proficiency in Organizational Inquiry, Research and Analysis

Learning Outcome 05) Students will become proficient in field research, participatory action research, and related data collection methods (e.g., surveys, interviews, focus groups, observation).

Learning Outcome 06) Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations, and evaluate effectiveness of interventions.

### Program Goal 4 - Competence with Teams, Culture and Diversity

Learning Outcome 07) Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.

Learning Outcome 08) Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.

DIRECT MEASURES PLAN				
Learning Outcome	Assessment Point	Assessment Instrument	Measurement Method	Next Scheduled Assessment
01	MSOD 673 MSOD 660	Individual course embedded assignment	Scored against rubric.	Spring 2017
	MSOD 690	Scored against rubric by panel of experts and professionals.		
02	MSOD 690	Culminating Project Presentation (Group) Individual Paper assignment	Scored against rubric by industry professional.	Spring 2017
03	MSOD 660	Individual course embedded assignment	Scored against rubric.	Fall 2017
	MSOD 690	Team Presentation and Paper	Scored against rubric by panel of experts and professionals.	Spring 2017
04	MSOD 673	Individual course embedded assignment	Scored against rubric.	Summer 2017
	MSOD 690	Team Presentation and Paper	Scored against rubric by panel of experts and professionals.	Spring 2017
05	MSOD 668	Individual course embedded assignment	Scored against rubric.	Fall 2018
	MSOD 690	Team Presentation and Paper	Scored against rubric by panel of experts and professionals.	Spring 2017
06	MSOD 668 MSOD 673	Individual course embedded assignment	Scored against rubric.	Fall 2018
	MSOD 690	Team Presentation and Paper	Scored against rubric by panel of experts and professionals.	Spring 2017



<b>07</b>	MSOD 690	Culminating Project Presentation (Group) Individual Paper assignment	Scored against rubric by industry professional.	Spring 2017
<b>08</b>	MSOD 690	Culminating Project Presentation (Group) Individual Paper assignment	Scored against rubric by industry professional.	Spring 2017

<b>INDIRECT MEASURES PLAN</b>			
<b>Assessment Instrument</b>	<b>Description</b>	<b>Schedule</b>	<b>How does it inform our curriculum?</b>
MSOD Advisory Board	MSOD alumni, OD leaders in the Bay Area, faculty, and current students	Meeting once in fall and spring	Makes recommendations regarding the ongoing improvement of the MSOD program and provide guidance to maintain a high caliber graduate program.
Plus/Delta feedback	End of program and mid-program survey of students.	Once per year	The survey provides information on what's working well and what needs improvement. This data is presented to the OD faculty and constituent groups who then work to incorporate findings to make positive changes in the program. From this data we develop and grow the program.
Retention Rates	Tracked by Center for Institutional Planning & Effectiveness	Every census, fall & spring	High (low) rates provide some evidence of how students perceive the value of their education
Graduation rates	Tracked by Center for Institutional Planning & Effectiveness	Every census, fall & spring	Provides information on what's working well and what needs improvement. This data is presented to the faculty who then incorporate findings to make changes in the program
Exit survey	Required survey on program satisfaction administered by Graduate Student Advising Office when students pick up their cap and gown.	Every graduation, fall and spring.	Provides information on what's working well and what needs improvement. This data is presented to the faculty who then incorporate findings to make changes in the program
Alumni & Employer Surveys	To be implemented in spring 2018.	Annually in spring.	AoL committee representative will work with MSOD program director in 2017.

## **MGEM program**

The Master in Global Entrepreneurial Management is a joint program between the University of San Francisco, Institut Químic de Sarrià (Barcelona), and Fu Jen Catholic University (Taipei).

The bulk of assessment effort resides at USF due to the program structure, in which the summative evaluation instruments are built into the last semester's courses. Nevertheless, the LO #1, 2 and 3 are assessed on the pre- and post- basis in the MGEM consulting projects,

which involves the IQS and USF team. Course-based assessments are conducted regularly by all three universities, and the data is used to inform program-level assessment efforts. The scope and number of learning outcomes as well as the assessment schedule are being reviewed and revised in fall 2016. For academic year 16/17, all LOs will be assessed in summer 17 at USF. The power point presentation from the August 16, 2016 meeting of faculty from all three schools on the topic of assessment is included in appendix G.

**Program Goals and Learning Outcomes:**

**Program Goal 1 Students will be prepared to be passionate, ethical and effective global leaders.**

Learning Outcome: 01) Lead and Manage Diverse Individuals

Students will be able to demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.

Learning Outcome: 02) Identify the Ethical and Professional Responsibilities

Students will be able to identify the ethical and professional responsibilities of a global entrepreneur.

Learning Outcome: 03) Effective Communication

Students will be able to use verbal and written communication effectively across different mediums

**Program Goal 2 – Students will have the skills necessary to develop a unique idea for a new business, product and/or service within an existing firm.**

Learning Outcome: 04) Demonstrate and Apply Knowledge

Students will be able to demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions.

Learning Outcome: 05) Identify and Analyze Financial Information

Students will be able to identify and analyze financial information to make effective managerial decisions.

DIRECT MEASURES PLAN				
Learning Outcome	Assessment Point	Assessment Instrument	Measurement Method	Next Scheduled Assessment
01	MGEM 5111 MGEM 5114 MGEM 5115	Case Analysis Presentations (Individual/ Team) Final Project Presentations in the IQS Consulting Projects (Pre-Test), MGEM 5111, and US Consulting Course (Post-Test), MGEM 5114 & 5115	Scored against rubric	Summer 2017
02	MGEM 5111 MGEM 5115	Case Analysis Presentations (Individual/ Team) Final Project Presentations	Scored against rubric	Summer 2017
03	MGEM 5111 MGEM 5114	Final project presentations, MGEM 5111 (pre), MGEM 5114 (post)	Scored against rubric	Summer 2017

<b>04</b>	MGEM 5109	Individual presentation and student exam	Scored against rubric	Summer 2017
<b>05</b>	MGEM 5112	Individual Final Exams with quantitative and qualitative questions.	Scored against rubric	Summer 2017

INDIRECT MEASURES PLAN			
Assessment Instrument	Description	Schedule	How does it inform our curriculum?
Retention Rates	Tracked by Center for Institutional Planning & Effectiveness	Every census, fall & spring	High (low) rates provide some evidence of how students perceive the value of their education
MGEM Alumni Tracking	Tracks MGEM professional placement and career growth	Once per year.	Inquires what part of the curriculum the alumni found most relevant to their professional success and soliciting general feedback about the program curricular and co-curricular programmatic improvements.
Student program survey	Curriculum satisfaction survey.	At graduation.	Students identify issues with professional preparedness and suggestions for curriculum improvement.

## MSFA program

The MSFA Program Goals and associated AoL were developed in the context of the MSFA program's longstanding accreditation (since 2006) by the CFA Institute as one of its Official Academic Program Partners. This certifies that the MSFA program covers more than 80% of the Body of Knowledge (BOK) associated with the Chartered Financial Analyst (CFA®) designation. The CFA BOK is constantly updated by the CFA Institute through practitioner surveys and financial firm input to ensure the BOK reflects the skills the investment management profession is looking for. Within this context, the 3 full-time faculty associated with the MSFA program (Profs. Chincarini, Gonzales and Veitch) met in fall 2014 to recast the then existing MSFA standards to better meet the AACSB requirements. The 3 main program goals and the 9 associated LOs were determined during this meeting and subsequent email exchanges. These LOS were implemented in spring 2015.

In fall 2015, the full-time MSFA faculty met along with MSFA adjunct faculty to discuss further refinements of the LOS and provide feedback more generally on what type of curricular changes were appropriate. As a result of these discussions, changes were made to bring the Econometrics courses earlier in the program to support the elective courses added in 2014, synchronize elective courses across cohorts, and change the delivery method of the Ethics and Finance course to the full-time MSFA students.

In September 2016, MSFA faculty met to discuss results of the previous curriculum changes and discuss AACSB preferences for student rather than group assessments. For many of the LOS, faculty agreed to adopt an assessment method that included one targeted question on

their final exam that specifically focused on a LO in their area. This general agreement amongst faculty allowed us to extend the assessment across a wider variety of courses at a number of different points in the curriculum. We will implement this strategy beginning in fall 2016, with the view that these assessments will take place each time the course is offered. This will provide us with an ongoing view of student outcomes, rather than waiting to assess blocks every three years. The learning outcomes will be assessed over a three-year cycle, with learning outcomes 1-1, 1-3, 2-1, 3-1, and 3-2 assessed every year, and learning outcomes 1-2, 2-2, 2-3, and 3-3 assessed every third year.

New for 2016, is the addition of the exit survey at graduation, administered by Career Services, in an effort to increase the indirect measures within the program's assessment. 100 percent of the part-time respondents reported that they are likely or very likely to recommend the program to others. Among the respondents, 44 percent reported a salary increase after completing the program, and 90 percent of the full time population are likely or very likely to recommend the program to others. We will use this data in concert with the employment outcomes survey to gauge how well the program is preparing students.

### Program Goals and Learning Outcomes for 16/17:

#### **Program Goal 1 - Apply quantitative methods and analytic tools from economics, statistics, finance and accounting to value and manage portfolios of financial assets.**

##### Learning Outcome: 1-1 Analytical Tools – Finance

Employ fundamental quantitative techniques essential in financial analysis and investment management including (i) the time value of money, (ii) the basics of statistics and probability theory, (iii) probability theory applied in the field of investment valuation and financial risk management, and (iv) joint behavior of two or more variables, including correlation and linear regression.

##### Learning Outcome: 1-2 Analytical Tools – Economics

Recognize and explain how macroeconomic and microeconomic events impact key components of economic activity, including industry structure, firm profitability, macroeconomic output, prices, interest and exchange rates.

##### Learning Outcome: 1-3 Analytical Tools – Accounting

Describe and interpret financial accounting concepts and measurements to (i) use financial statements and footnotes to analyze an investment valuation; ii) analyze a company's liquidity, profitability, financial stability, solvency, and asset utilization; and iii) analyze the effects of alternative accounting methods and assumptions on firm valuation.

#### **Program Goal 2 - Integrate economics, statistics, and financial concepts to analyze and assess the value of financial assets.**

##### Learning Outcome: 2-1 Integration - Equity Valuation

Discuss and evaluate the techniques used to analyze the value of equity investments, in securities markets using efficient market theory and the analysis of risk and return in equity portfolios.

##### Learning Outcome: 2-2 Integration - Fixed Income Valuation

Analyze fixed income investments using the characteristics of bonds and factors that influence bond yields. Develop strategies for fixed income portfolios.

Learning Outcome: 2-3 Integration - Derivatives Valuation

Analyze the sources of value in derivative investments, including forwards, futures, options, and swaps, and demonstrate how derivatives are used to manage risk in the investment process.

**Program Goal 3 - Describe the standards of ethical behavior in financial markets and financial regulations and evaluate how these standards apply in specific situations.**

Learning Outcome: 3-1 Ethics – Standards

Describe the framework for ethical conduct as set out in the CFA Institute Code of Ethics and Standards of Professional Conduct and Global Investment Performance Standards (GIPS®).

Learning Outcome: 3-2 Ethics – Evaluation

Evaluate and assess how these standards have, or have not been, followed in specific investment situations. Discuss how the CFA ethical standards relate more broadly to ethical values.

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.

DIRECT MEASURES PLAN				
Learning Outcome	Assessment Point	Assessment Instrument	Measurement Method	Next Scheduled Assessment
1.1	MSFA 714	Embedded final exam question focused on interpretation of quantitative results in a financial context.	Scored against a rubric	Fall 2016/ongoing
	MSFA 736	Pre and Post test administered at start and end of course.		Fall 2018/ongoing
1.2	MSFA 716	Embedded final exam question focused on link between macroeconomics and valuation.	Scored with a rubric focused on ability to integrate with finance theory.	Fall 2016
	MSFA 710	Embedded final exam question focused on link between microeconomics and valuation.		Fall 2017
1.3	MSFA 720	Individual Paper applying DCF models for valuation to a publicly traded company.	Scored against rubric	Fall 2017
	MSFA 726	Individual Paper applying relative valuation and		Fall 2016/ongoing

		accounting adjustments to a publicly traded company.		
2.1	MSFA 723	Individual test on Excel modelling. Group course project.	Test scored as a percent correct. Individual Performance in Group Presentation Scored against rubric	Fall 2017
2.2	MSFA 722	Embedded final exam question focused on valuation.	Scored against a rubric	Fall 2016
2.3	MSFA 724	Embedded final exam question focused on valuation.	Scored against a rubric	Spring 2017
3.1	MSFA 728	Students will receive CFA Institute Certificates on Ethics	Awarded by CFA Institute after required hours plus pass exams	Fall 2015 ongoing
3.2	MSFA 728	Pre and Post tests administered at start and end of course.	Short answer test designed to integrate values with CFA Ethics.	Fall 2016
3.3	MSFA 746	Individual Course presentation	Scored and students binned with target percentage.	Fall 2017

INDIRECT MEASURES PLAN			
Assessment Instrument	Description	Schedule	How does it inform our curriculum?
Regional CFA Institute Global Investment Research Challenge	The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis. Students work in teams to research and analyze a publicly traded company.	Yearly	The competition is important because it helps bridge the gap between academic learning and real world application.
CFA Level I exam pass rate	Pass rates of students who take the CFA Level I exam in December or June each year compared to general population.	Yearly	It shows how our students perform relative to the general population of students who are predominantly using self-teaching materials.
Employment Outcomes of Domestic students	Employment rates for domestic students should be close to 100% measured 6 months after graduation	Yearly	It shows how attractive our students are to the Bay Area Investment industry.
Employment Outcomes of International students	Employment rates for domestic students should be above 70% measured 6 months after graduation	Yearly	It shows how attractive our students are to the Investment industry in their native country. It is difficult to find U.S. financial firms who will sponsor international students.
Exit survey	Required survey on program satisfaction administered by Graduate Student Advising Office when students pick up their cap and gown.	Every graduation, fall and spring.	Provides information on what's working well and what needs improvement. This data is presented to the faculty who then incorporate findings to make changes in the program

## SCHEDULED AY 15/16 ASSESSMENTS

All scheduled assessment for AY 15/16 was completed. Full reports are included in the appendix.

### BSBA Program

#### Summary Table

Learning Outcome	When Assessed	Assessment Point	Report	Results	Notes on Closing the Loop
<b>BSBA LO 3 Communication</b> Effectively communicate orally and in writing using various mediums across unique situations.	Spring 2016	BUS 308 - Systems in Orgs [Writing] BUS 401 - Strategic Mgt (Capstone Course) BUS 406 - Entrepreneurial Mgt (Capstone course) [Oral]	Yes	Target: 80% will meet expectations. Result: 23.6% of the students met or exceeded expectations on written communications. 76.4% of the students were below expectations on written communications.	Proposed actions include: 1) provide more written and oral assignments in earlier core courses such as 301, 302 and 304. 2) create and make consistent rubrics available to all instructors for evaluation of outcome 3) revise LO and rubrics to allow for clearer assessment of Learning Goal.
<b>BSBA LO 4 Quantitative and Qualitative Information</b> Create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.	Spring 2016	BUS 308 - Systems in Orgs ----- BUS 401 - Strategic Mgt (Capstone Course)	Yes	Target: 80% will meet or exceed expectations.  82% of students met or exceeded expectations.  Though the target was met, performance in case analyses revealed substantive lapses. Students need to improve analytical reasoning.	Proposed actions include: 1) more individual case assignments in preceding core courses 301 and 302 that combine qualitative and quantitative information and allow students to exercise critical thinking skills.
<b>BSBA LO 5 Accounting</b> Attain financial literacy in the understanding and interpretation of financial statements of organizations.	Spring 2016	BUS 201 Principles of Financial Accounting	Yes	Target: 80% will meet expectations. Results broken out into three traits.  Results: 70% met expectations for Main Account Equation. 98% met expectations for Double entry accounting. 79% met expectations for Main Financial Statements.	It was determined that further revision of LO5 is needed to make it more clear and focused (i.e., a term "financing literacy" to be replaced with a more specific "accounting concepts and principles" term; also a main focus will be defined as preparing and analyzing financial statements).  2) The determined weakness of the current assessment: it was not performed in a uniform way in all available sections. For next assessment, use a sufficient set of uniform questions to test LO5 among every student involved in the program.  3) To further differentiate level of problems that students face, and assess qualitative and quantitative aspects of the subject, it would be beneficial to include both, conceptual and quantitative questions for each rubric.

<b>BSBA LO 6 Finance</b> Use financial information to assess economic value of real and financial assets, and make decisions to create value.	Spring 2016	BUS 305 Principles of Finance	Yes	Target: 80% will meet or exceed expectations.  Overall result: 80% of student met expectations.	Although data suggest students are, on average, meeting targeted goals, the assessment design is flawed. Assessment was conducted in different sections and different questions were used making comparisons across sections invalid.  Proposed actions; changes to LO, rubrics are being changed. More details are described in Section 1.
<b>BSBA LO 9 Marketing</b> Produce specific marketing tools needed for product development, consumer communications, pricing and distribution channels.	Spring 2016	BUS 302 Marketing Principles	Yes	Target: 80% will meet or exceed expectations.  Result: Overall, 64% of students met expectations for product development. Overall, 83% of students met expectation for pricing.	Product development will be emphasized more in the curriculum going forward. Further, the Marketing faculty and AoL Committee reviewed LO9 and made changes as detailed in section 1.
<b>BSBA LO 10 Strategy and Competitive Advantage</b> Develop specific and actionable strategic options at different levels to enhance the organization's competitive position through rigorous analysis of the changes in its competitive environment, its industry/sector, and its internal resources.	Spring 2016	BUS 401 Strategic Mgt (Capstone Course)	Yes	Target: 80% will meet or exceed expectations.  Results: Well defined Problem: Only 38% met expectations. Recommended Strategy: Only 16% met expectations.	A difficulty in the assessment process was that the presentations were done by groups rather than by individuals. Going forward, individual student assignments will be developed for assessment purposes. Capstone faculty have finalized a standard strategy rubric between the strategy and entrepreneurial management classes.
<b>BSBA LO 11 Diversity and Integration</b> Appreciate diversity and integrate cultural, economic, political, historical, geographic, and environmental perspectives in decision-making.	Spring 2016	BUS 308 Systems in Organizations BUS 406 Entrepreneurial Management (Capstone course)	Yes	Target: 80% will meet expectations. Result: Target met.  This LO was assessed in BUS 308 via forming groups according to CATME, a method to form diverse groups.	The formation of diverse groups is not an assessment of this outcome. However, this LO is difficult to assess as written. Not only does the learning outcome include multiple areas (cultural, economic, political, historical, geographic, and environmental) which would be almost impossible to assess in a single assignment (or even multiple assignments), but the word "appreciate" is not operational. The learning outcome will be rewritten. This LO was also assessed in BUS 406 but, as noted above, where assessment also proved difficult for the same reasons.

### Overall Summary:

Many of the LOs were very difficult to assess as written. The approach to improving the LOs was as follows:

- 1) Members of the AoL committee discussed weaknesses between June 17, 2016-September 1, 2016.
- 2) Faculty members with expertise in the area consult with other faculty who teach in the area to create improved LOs that are consistent with overall program goals, are measurable, and for which assessment instruments can be devised.
- 3) Revised LOs were endorsed by the Undergraduate Program Committee (UPC) on October 3, 2016 and implemented.
- 4) Scheduled AY 16-17 assessment uses updated LOs.



**BSM Program**  
Summary Table

Learning Outcome	When Assessed	Assessment Point	Report	Results	Notes on Closing the Loop
<b>BSM LO 2</b> Ethical and legal behavior, and social responsibility Recognize and analyze ethical, legal and social implications of management decisions and devise appropriate responses.	Spring 2016	Pre-test in BSM 303, Post-test in BSM 309	Yes	7.03% increase in number of correctly answered questions for social environment. [60% / 67.03%] 6.32% increase in number of correctly answered questions for Legal environment [48.75% / 55.07%]	Faculty to include more business scenarios and Silicon Valley context with ethical and social responsibility in the curriculum. Additional elements of legal environment need to be provided in the classroom.
<b>BSM LO 5</b> Accounting Attain financial literacy in the understanding and interpretation of financial statements of organizations.	Spring 2016	Pre-test in BSM 303, Post-test in BSM 309	Yes	3.47% increase in correctly answered questions for accounting. [45.39% / 48.86%]	Restructure delivery of BSM 309.
<b>BSM LO 6</b> Finance Use financial information to assess economic value of real and financial assets, and make decisions to create value.	Spring 2016	Pre-test in BSM 303, Post-test in BSM 309	Yes	1.76 % increase in correctly answered questions. [40.63% / 42.39%]	Introduction of new BSM course in Finance by AY 17-18.
<b>BSM LO 7</b> Organizational Behavior and Theory Develop and leverage human and social capital in organizations.	Spring 2016	Pre-test in BSM 303, Post-test in BSM 309	Yes	7.81 % increase in correctly answered questions. [52.33% / 60.14%]	Revise curriculum in BSM 304 incorporating more local leaders into the classroom to help students gain additional perspective.
<b>BSM 3-9</b> Marketing Produce specific marketing tools needed for product development, consumer communications, pricing and distribution channels.	Spring 2016	Pre-test in BSM 303, Post-test in BSM 309	Yes	6.17% increase in correctly answered questions. [42.92% / 49.09%]	Revise curriculum in BSM 302. Marketing Learning Outcome was rewritten in summer 2016 to address what students learn in the marketing core of the business program.

**BSM Overall Summary:**

CBE results did not show a great improvement in subject knowledge. UPC Task Group has been formed to review BSM curriculum. The group will review coverage of the LOs in the curriculum, and if all of the LOs are appropriate and create a standard for which CBE results will be measured.

**MBA Program  
Summary Table**

Learning Outcome	When Assessed	Assessment Point	Report	Results	Notes on Closing the Loop
<p><b>MBA LO 2</b> Practical Problems Students will apply theory to solve practical problems.</p>	<p>Spring 2016/Fall 2016</p>	<p>MBA 6011 Financial &amp; Mgr. Accounting ----- MBA 6607 Corp Ent. &amp; Innovation (other courses in Fall 2016)</p>	<p>Yes</p>	<p>Target=80% of students meet expectations. Results: Multiple Choice: 42% of student met expectations. Short answer: 52% of students met expectations. Essay: 90% of students met expectations. There was a disparity in student performance.</p>	<p>Results were assessed via a class exam and were mixed. A rubric is needed to measure essay questions to ensure that measurement is based on an achievement of outcomes rather than performance in the class. Sample size needs to be larger and MBA 6015 may be a more appropriate course in which to assess this outcome. The curriculum map will be fine-tuned by MBA faculty this fall.</p>
<p><b>MBA LO 4</b> Legal, Ethical and Social Concerns Students will integrate legal, ethical and social concerns into business decisions.</p>	<p>Spring 2016</p>	<p>MBA 6012 Ethics &amp; Social Responsibility</p>	<p>Yes</p>	<p>Target: 70% will meet expectations. 10% will exceed expectations.  Result: 87% of students exceeded expectations. Results were assessed via a case study (group) assignment and individual reflection papers.</p>	<p>LO has been revised. Additional individual case assignments will be made in future and rubrics will be modified to increase student learning.</p>
<p><b>MBA LO 5</b> Leadership and Communication Skills Students will possess effective leadership and communication skills &amp; strategies.</p>	<p>Spring 2016</p>	<p>MBA 6013 Strategic Mgt in the Global Environment  MBA Integrative Exercise</p>	<p>Yes</p>	<p>Target: 80% of students meet expectations. Results: Content average: 17% met expectations Delivery average: 38.75% met expectations. Results were assessed in oral presentations by an outside evaluator in MBA 6015, Sustainable Supply Chain Management.</p>	<p>This outcome should be assessed in multiple sections and courses for a larger sample that includes both full time and part time students. Use of external evaluator will be continued. Increase opportunities for students to hone these skills.</p>

**MBA Overall Summary:**

Many of the assessments were carried out in a group setting; individual assessment instruments have been identified going forward. Additionally, the following improvements are underway:

1. The LOs have been reevaluated by the MBA Program committee, and were adopted by the Graduate Program Committee in Fall 2016.
2. Curriculum map has been updated to reflect revised LOs
3. Instruments that address revised LOs have been identified, and are scheduled for assessment

## EMBA Program Summary Table

Learning Outcome	When Assessed	Assessment Point	Report	Results	Notes on Closing the Loop
<b>EMBA LO 2</b> Prepare Data and Findings. Prepare data and findings and proposed partnerships in a way that is honest, transparent, and socially just.	Spring 2016	EMBA 6915 Ethics & Social Responsibility	Yes.	Target goals were met for all four learning outcomes as tested (see report in appendix), and no changes to the curriculum are anticipated as a result of the assessment.	Rubric doesn't score this LO very accurately. We need to look at the case data and apply a better rubric. LO as worded is difficult to assess.
<b>EMBA LO 5</b> Analyze Information and Data. Analyze and apply information and data to business decisions.	Spring 2016	EMBA 6912 Decision Modeling & Data Analysis	Yes.	100% of students met target. Results were assessed in two separate courses. One of the courses where assessed is described in LO 2 above. In the other assessment, group projects that evaluated and managed risk were assigned. Excellent performance may have been due to at least one member of each group with work related expertise in area, however, the other students in the groups were able to elevate their performance due to this. In future, there will be individual assignments to evaluate the LO.	Added suggested actions for rewritten outcome. For the future, think about what rubrics will look like for the newly revised eMBA LOs.
<b>EMBA LO 6</b> Formulate Strategic Plans. Formulate well thought out strategic plans and vision for future business decisions.	Spring 2016	EMBA 6917 Entrepreneurship	Yes.	Results were assessed via group simulations that required students to develop a comprehensive, international supply chain. Of the four groups, one exceeded expectations, two met expectations, and one failed to meet expectations.	Data gathered is based on group work. New LOs have been developed; these LOs will be assessed via individual assignments.
<b>EMBA LO 8</b> Summarize Basic Principles of Business Areas. Summarize basic principles of all main business areas, including accounting, finance, strategy, management, marketing, supply chain management, and business law.	Spring 2016	EMBA 6904 Managerial Accounting	Yes.	Results were assessed via a selection of short answer and essay questions from a progress quiz in Accounting. Ten questions were selected and evaluated by an independent faculty member. Performance exceeded target (83% vs. 80% target) of meet or exceed expectations.	Only accounting was assessed, not all business areas. Going forward, this learning outcome will be assessed by a standardized comprehensive exam.

### EMBA Overall Summary:

The LOs and curriculum map have been revised to better reflect program learning goals. Individual assignments have been created to measure student performance, including the on-going development of assessment instruments (rubrics).

## MSOD Program Summary Table

Learning Outcome	When Assessed	Assessment Point	Report	Results	Notes on Closing the Loop
<b>MSOD LO 1</b> <b>Understanding the Foundations, Theories and Models of OD</b> Students will become familiar with the key concepts, research, theories and models in OD.	Spring 2016	OD 690 Culminating Project	Yes	Students are successfully meeting the target for most LOs, but some LOs remain difficult to measure. In particular, learning outcomes 2b, 4b, and 5b were most difficult to assess.	<ul style="list-style-type: none"> <li>Discussed results with Advisory Group and engaged in brainstorming about diversity inclusion and importance of global culture in the program.</li> <li>Identified three classes where individual assessments would be used in subsequent assessments.</li> <li>Changed Culminating Project Assignment to be more explicit regarding LOs 2b and 5b.</li> <li>Review of AoL is on the agenda for the fall 2016 OD faculty meeting.</li> </ul> Proposal to change learning outcome language slightly to better reflect what students do.
<b>MSOD LO 2</b> <b>Understanding the Foundations, Theories and Models of OD</b> Students will apply OD theories and models to change interventions in organizations.	Spring 2016	OD 690 Culminating Project			
<b>MSOD LO 3</b> <b>Ability to Lead Change and Use Self-as-Instrument</b> Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.	Spring 2016	OD 690 Culminating Project			
<b>MSOD LO 4</b> <b>Ability to Lead Change and Use Self-as-Instrument</b> Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.	Spring 2016	OD 690 Culminating Project			
<b>MSOD LO 5</b> <b>Proficiency in Organizational Inquiry, Research and Analysis</b> Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).	Spring 2016	OD 690 Culminating Project			
<b>MSOD LO 6</b> <b>Proficiency in Organizational Inquiry, Research and Analysis</b> Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.	Spring 2016	OD 690 Culminating Project			
<b>MSOD LO 7</b> <b>Competence with Teams, Culture and Diversity</b> Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.	Spring 2016	OD 690 Culminating Project			
<b>MSOD LO 8</b> <b>Competence with Teams, Culture and Diversity</b> Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.	Spring 2016	OD 690 Culminating Project			

### MSOD Overall Summary:

The OD program learned that while a good indicator of many of our LOs, the culminating project presentation was an incomplete and imperfect mechanism for assessing all of our LOs. The culminating team project papers, however, appear to be much more comprehensive and allowed the evaluator to assess most of the LOs in the program. We are looking to continue to improve our assessment of 3 specific learning outcomes and to also begin to integrate individual-level assessments into our AoL procedures.

**MGEM Program**  
Summary Table

Learning Outcome	When Assessed	Assessment Point	Report	Results	Notes on Closing the Loop
<p><b>MGEM LO 1</b> <b>Lead and Manage Diverse Individuals</b> Demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.</p>	Summer 2016	MGEM 5111 MGEM 5114 MGEM 5115	Yes – 2 reports.	Though only 78% of students met expectations (80% was the target), overall, students have demonstrated a significant improvement over the course of the program (67.1%) overall on the SLO #1.	A cross-cultural competence inventory is to be identified and adopted for this SLO for program-assessment purposes (pre- and post- test) going forward. This SLO will be assessed again in the FY 16-17.
<p><b>MGEM LO 2</b> <b>Identify the Ethical and Professional Responsibilities</b> Identify the ethical and professional responsibilities of a global entrepreneur.</p>	Summer 2016	MGEM 5111 MGEM 5115	Yes – 2 reports	Students have not reached the goal of 80% target of exceeding expectations but have reached the 80% threshold of meeting or exceeding expectations (82.5%). Students displayed generally a good level of professional demeanor and knowledge of the case materials while handling a Q&A session of the case analysis presentations assessed individually.	Both ethical and professional characteristics should be further defined for SLO assessment and curricular purposes.
<p><b>MGEM LO 3</b> <b>Effective Communication</b> Communicate effectively both verbally and in writing, using different media.</p>	Summer 2016	MGEM 5111 MGEM 5114	Yes – 2 reports	Students have only been able to reach the mark of 80% meeting and exceeding expectations for the post-test for the verbal communication (97.5%) and pre- (80%) and post (100%)- tests for the non-verbal and written communication (visual design, information, and appeal of presentation slides and handouts). Overall, students have demonstrated a statistically significant improvement over the course of the program (19.3%) overall on the SLO #3. There is still a medium-strong positive relationship between the program's impact and the student's growth/improvement in verbal and written communication skills in different media.	Faculty have found that the SLO may need to be slightly revised to focus on the specific communication skill sets and outcomes rather than a generic statement; a more detailed and relevant rubric to be developed and used more consistently by reviewers (faculty) and their clients. The inter-rater reliability (pre- and post-) also needs to be better accounted for.
<p><b>MGEM LO 4</b> <b>Demonstrate and Apply Knowledge</b> Demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions.</p>	Summer 2016	MGEM 5109	Yes	On average, 75% of the students in the sample met or exceeded expectations in applying global perspective into their paper for one of two case studies that were used.	The target for the assessment was that 80% of students would meet or exceed expectations, so next summer, the professor will be completing a series of exercises prior to the first case that reinforces the elements of SELECT by using three mini-cases. By emphasizing the importance of the cross-cultural component, both professors believe students will better integrate it into analysis.
<p><b>MGEM LO 5</b> <b>Identify and Analyze Financial Information</b></p>	Summer 2016	MGEM 5112	Yes	Students have demonstrated a rather high level of performance in their familiarity with the valuation concepts on the descriptive level (qualitative	IQS faculty have introduced an introductory finance/ accounting course to be taken prior to the Common Ground

Identify and analyze financial information to make effective managerial decisions.			aspects), their ability to calculate EBITDA and multiples for valuation purposes (quantitative aspects) was significantly lower –20-30% of the students scoring below the threshold proficiency levels. The results indicated uneven level of preparation and weaker background in the finance material that may partially stem from the gaps in the MGEM Finance curriculum in addition to the undergraduate educational demographics of the cohort.	in Corporate Valuation course (scheduled for the Fall II semester). The non-credit course has been scheduled to take place for all MGEM students starting Fall 2016 with an option to test out for those who have had the necessary business/ finance training and experience.
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**MGEM Overall Summary:**

1. All LOs will be reassessed in 16-17.
2. LO2 will be refined.
3. Introductory finance course will be added to fall 2016 curriculum to address students' varied preparation levels in that subject.

**MSFA Program  
Summary Table**

Learning Outcome	When Assessed	Assessment Point	Report	Results	Notes on Closing the Loop
<p><b>MSFA 1-1</b> Analytical Tools – Finance Employ fundamental quantitative techniques essential in financial analysis and investment management including (i) the time value of money, (ii) the basics of statistics and probability theory, (iii) probability theory applied in the field of investment valuation and financial risk management, and (iv) joint behavior of two or more variables, including correlation and linear regression.</p>	<p>Fall 15/Spring 16</p>	<p>MSFA 736</p>	<p>Yes</p>	<p>Target: 75% of students will achieve at least a score of “satisfactory” on the exam.</p> <p>100% of students received scores of 90% or better. Quantitative skills performed at expected level or beyond.</p>	<p>Move the Econometrics course into the MSFA first semester to develop these skills earlier in the program. This will support more advanced assignments and LOS in later courses.</p>
<p><b>MSFA 3-1</b> Ethics – Standards Describe the framework for ethical conduct as set out in the CFA Institute Code of Ethics and Standards of Professional Conduct and Global Investment Performance Standards (GIPS®).</p>	<p>Fall 15/Spring 17</p>	<p>MSFA 728</p>	<p>Yes</p>	<p>All students completed the online CFA Institute training in Ethics (14 hours across 7 areas) and ALL students received the set of completion certificates from the CFA Institute. No students achieved a result of 75% or better, which was the target, on the Ethics Assessment exam.</p>	<p>In Fall 2015, the MSFA program moved to this online CFA Institute Ethics format where students take 14+ online hours studying the CFA Institute Ethical Standards. On a short assessment exam that placed these Ethical Standards in real life situations, only 12.5% of these same students met the satisfactory level (75%).</p> <p>Course will be modified so there are more live class sessions to discuss the Ethical Standards in real-life investment situations.</p>

**MSFA Overall Summary:**

Students are exceeding expectations in the ability to use analytical tools. Students fell short of the target in their ability to describe the framework for Ethics standards, so the course will be modified and the LO will be reassessed in spring 2017.

# APPENDIX

## **Appendix A. SOM Strategic Planning Committee Members**

Muhammad Al-Abdullah, BAIS Department Faculty  
Karl Boedecker, ELIB Department Chair  
Laura Camara, Director of Academic Operations, Planning & Resources  
Mark Cannice, EIS Department Chair  
Ludwig Chincarini, Finance Department Faculty  
Fernando Comiran, Accounting Department Faculty  
Elizabeth Davis, Dean, Co-chair  
Susan Ewens, Associate Director of Alumni & External Relations  
Frank Fletcher, MBA Program Director  
Danielle Glynn, Director of Alumni & External Relations  
Nicholas Imparato, Marketing Department Chair  
Michelle Millar, Hospitality Management Department Faculty  
Linda Naugle, Director of Development for SOM  
Richard Stackman, OLC Department Faculty & Director of Strategic Initiatives, Co-chair  
Marco Tavanti, MNA Program Director  
Liang Wang, EIS Department Faculty  
Xiaohau Yang, ELIB Department Faculty



## Appendix B. SOM Strategic Planning Overview: 2012 to Present

	<b>2012-2013</b> (Sources: Strategic Framework 2013; Strategic Goals Checklist 2012)	<b>2014- (March) 2016</b> (Sources: AACSB CIR; SOM Strategic Plan Update 2016)	<b>Current</b>
<b>Vision</b>	The School of Management will contribute to the lives of the students, faculty, staff, and community as a premier Jesuit teaching, research and service institution offering management education drawing on a distinctive regional network and global connections.	The School of Management will be one of the premier teaching, research and networking platforms for managerial education, one that is regionally anchored, nationally recognized and globally connected.	A sub-committee (Liz, Ludwig, Susan and Xiaohau) is reviewing/revising the vision and mission.
<b>Mission</b>	The School of Management at the University of San Francisco is a catalyst for change in business, government and non-profit managerial practices. Through research and teaching that draws on the global diversity and entrepreneurial energy of our region, we educate students to build more productive and compassionate organizations. We value human dignity and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit that combine to facilitate significant contributions by our graduates, students, faculty, and staff.	The School of Management at the University of San Francisco is a catalyst for change in business, government and non-profit managerial practice. Through research and teaching that draws on the global diversity and entrepreneurial energy of our region, we educate students to build more productive and compassionate organizations. We value human dignity and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit.	
<b>Strategic Assets</b>	Small School Advantage Sector Emphasis San Francisco Location Social Justice Orientation	San Francisco Location Multi-Sector Orientation Conscious Capitalism/Social Innovation	San Francisco Bay Area/Silicon Valley Location Jesuit (Values and Network) Multi-Sector Orientation Diverse Student Body World-Class Stakeholders
<b>Core Educational Competencies</b>		Conscious Leadership Innovation Mindset Data-Driven Decision Making	A sub-committee (Frank, Marco and Richard) is reviewing/revising the distinctive core competencies with respect to faculty/staff, student, and operations.  Conscious Leadership Innovation/Entrepreneurial Mindset Data-Driven Decision-Making Globally Responsible Professionally-Engaged Faculty who relate theory-to-practice and translate practice-to-theory

<b>Strategic (Objectives) Priorities</b>	<ol style="list-style-type: none"> <li>1. Develop strong external market position for all programs.</li> <li>2. Ensure distinctive, high-quality curriculum in all programs.</li> <li>3. Provide effective management of all programs.</li> <li>4. Establish a strong culture of student learning.</li> <li>5. Increase quality of matriculated students</li> <li>6. Connect regionally and globally.</li> <li>7. Create teamwork and a culture of accountability.</li> <li>8. Internal operations.</li> </ol>	<ol style="list-style-type: none"> <li>1. Creating a culture of openness, engagement and transparency</li> <li>2. Regional Campus development</li> <li>3. Culture of engagement: High performance through value-driven behaviors</li> <li>4. Improving the student experiences through the student life cycle admissions</li> <li>5. The who + the what of SOM</li> <li>6. The School's role in solving the world's problems</li> <li>7. Social innovation (developing distinctive products to embody a constant theme of social innovation and capacity development</li> <li>8. Closed loop management of teaching qualities</li> </ol> <p><u>Additional Priorities:</u></p> <ul style="list-style-type: none"> <li>○ Create a vibrant research culture</li> <li>○ Connect regionally and globally</li> <li>○ Create teamwork and culture of accountability</li> <li>○ Internal operations</li> <li>○ Improve student experience</li> </ul>	<p>A sub-committee (Laura, Liang, Linda and Michelle) is reviewing/revising the strategic priorities.</p> <ul style="list-style-type: none"> <li>• What is the importance of each strategic priority in relation to the other strategic priorities?</li> <li>• Are some strategic priorities better portrayed as “ongoing endeavors” (e.g., strong market position, distinctive and high-quality curriculum, high-quality matriculated students, effective/efficient internal operations)?</li> <li>• What strategic priorities have been achieved?</li> <li>• Are there any missing strategic priorities (e.g., external funding)?</li> <li>• Do we have updated status reports from the task forces?</li> </ul>
<b>Strategic Initiatives</b>		Professional Edge Program Harari Program for Conscious Leadership & Social Innovation Masters in Entrepreneurship & Innovation Partners in Entrepreneurship Program Center for Social Impact SOM Dean's Student Scholarships	
<b>Strategic Objectives</b> (Provided for informational purposes)	<ol style="list-style-type: none"> <li>1. Ensure high-quality curriculum with a culture of high expectations for students, faculty and staff across all programs, supporting social justice and mission-related academic and community impact. (<i>Small School Advantage; Social Justice Orientation; San Francisco Location</i>).</li> <li>2. Create a vibrant research and consultant culture that promotes excellence and innovation in research and professional engagements across the private, public and nonprofit sectors, with an emphasis on innovation (<i>Sector Advantage</i>).</li> <li>3. Foster diverse and inclusive interactions for faculty, staff and students that encourage high performance, teamwork, respect, and accountability across main campus, downtown, and regions. (<i>Social Justice Orientation</i>).</li> <li>4. Generate and nurture mutually beneficial relationships with organizations, professional associations, and individuals that secure access and resources that support the lifelong learning and professional development of our students and alumni across all programs. (<i>San Francisco Advantage; Small School Advantage; Sector Emphasis; Social Justice Orientation</i>).</li> </ol>	<ol style="list-style-type: none"> <li>1. Build a culture of <i>engagement and innovation</i> with faculty, staff, and students, using a platform of theory-to-practice focused on experiential learning.</li> <li>2. Rebuild business, alumni and community ties in the San Francisco region and beyond, creating a sustainable system of <i>engagement</i> and giving.</li> <li>3. Craft a differentiation strategy to carry the school forward for the next 3-5 years, building on internal core competence in <i>conscious leadership, innovation mindset, and data-driven decision-making</i>.</li> </ol>	

**Appendix C. Updated Table 5: Financial Support for Strategic Initiatives (from January 2016 CIR)**

<b>Initiative</b>	<b>Start Date</b>	<b>First-year Cost (See Table 2a)</b>	<b>Continuing Annual Cost (See Table 2b)</b>	<b>Source of Annual Funding</b>
<b>Professional Edge Program</b>	Fall 2016	\$38,800	\$58,300	\$30,000 from Endowed/Dean's Discretionary Fund; \$28,300 from Operating Budget. Note: Growth in program (and base budget) beyond dollar amounts listed will come from proposed annual student fee.
<b>Harari Center for Conscious Leadership &amp; Social Innovation</b>	Spring 2016	\$100,000 (\$45k for program director and support staff; symposium and speaker costs; executive in residence)	\$100,000	\$45,000 from Endowment; \$55,000 from Dean's Discretionary Funds
<b>Masters in Entrepreneurship &amp; Innovation</b>	Fall 2017	\$75,000 in 2016-17 for marketing of new program	\$200,000 (new faculty line plus \$50,000 for marketing)	Allocation to base budget through tuition revenue.
<del><b>Partners in Entrepreneurship</b></del>	Removed from Strategic Plan			
<b>Center for Sustainable Social Impact</b>	Fall 2017	\$50,000 (\$45k for program director and support staff; \$5k for operating expenses)	\$50,000	\$50,000 from gift. Additional expenses for Center to be covered from fees generated from activities.
<b>SOM Dean's Student Scholarships</b>	Fall 2016	\$25,000	\$50,000	\$25,000 from Endowment; remainder from annual fund raising target.

## **Appendix D. Assurance of Learning (AoL) Committee Membership**

Systems & Analytics: Muhammad Al-Abdullah, Assistant Professor

Ethics: Kimberly Connor, Professor

Organization, Leadership & Communication: Linda Henderson, Associate Professor

Entrepreneurship & Management: Monika Hudson, Assistant Professor

Accounting: Tatiana Fedyk, Assistant Professor

Marketing: Sonja Poole, Assistant Professor

Finance: Nicholas Tay, Professor

# Appendix E. Curriculum Maps, & Assessment Schedule, By Program

## BSBA Program

BSBA Curriculum Map											
Map Curriculum to BSBA Learning Outcomes by indicating with an 1, 2, or 3 in the appropriate box											
1 = Introduced											
2 = Moderate Coverage											
3 = Comprehensive Coverage											
	BUS 201	BUS 202	BUS 204	BUS 205	BUS 301	BUS 302	BUS 304	BUS 305	BUS 308	Strategic Management Capstone	
BSBA Learning Outcomes	Principles of Financial Accounting	Principles of Managerial Accounting	Quantitative Business Analysis	Applied Business Technology	Business Law	Marketing Management	Mgt and Organizational Dynamics	Principles of Finance	Systems in Organizations	Strategic Management	Entrepreneurial Management
<b>Program Goal 1 – Develop Effective and Ethical Leaders</b>											
01) Students will analyze the effective qualities of a leader using organizational behavior frameworks.						2	2	2			
02) Students will evaluate personal leadership capacities and areas for future personal growth.							2				
03) Students will identify and describe stakeholders across multiple sectors; connect ethical theory to stakeholder values; recognize and interpret societal context that influences stakeholders.					1		2			1	1
04) Students will effectively communicate orally and in writing using various mediums across diverse situations.							2			3	3
<b>Program Goal 2 – Innovative &amp; Creative Decision-making</b>											
05) Students will create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.	1	3	2	2					3	3	3
<b>Program Goal 3 - Domain Concepts</b>											
06) Accounting Students will use accounting concepts and principles in creating and analyzing financial statements of organizations.	3	1								1	1
07) Finance Students will demonstrate ability to identify relevant information and apply specific knowledge and analysis skills to assess the economic value of real/financial assets or investment opportunities and make appropriate decision to create value.		1						2		3	3
08) Organizational Behavior Students will work effectively in groups and foster positive team dynamics.							3			2	2
09) Technology Students will describe the intertwined relationship among technology, information, and the organizational structure and operations in order to assess and evaluate the core technology concepts that enable sound organizational decision making.				1					2	1	1
10) Marketing Students will be able to identify the core concepts of marketing – price, product, place, and promotion.						2				3	3
11) Business Law Students will draw legal conclusions based on sound legal analysis; identify the elements of a valid, enforceable contract and defenses to contract formation; and, understand the nature and purposes of legal remedies.					3						
12) Strategy Students will develop specific and actionable strategic options to enhance the organization's position through analysis of the changes in its competitive environment, its industry/sector, and its internal resources.		1								3	3
<b>Program Goal 4 - Global Orientation</b>											
13) Students will integrate diverse perspectives (e.g. cultural, religious, economic, political, historical, geographic, environmental) in decision-making.										2	2
<b>Term Offered</b>	Fall				Fall	Fall	Fall	Fall	Fall	Fall	Fall
<b>Learning Outcome Measured</b>	LO 5				LO 10	LO 10	LOs 1, 2, 3 & 8	LO 7	LOs 5 & 9	LOs 4, 12, & 13	LOs 4, 12, & 13
<b>Direct Measure Assessment Activity</b>	Course embedded questions/problems				Set of 10 objective questions	Course embedded questions/problems	Case assignment (1,2), Short question (3), CATME (4)	Course embedded questions/problems	Simulation & essay (5), Questions/problems (6)	Individual presentations scored by external evaluators	Individual presentations scored by external evaluators
<b>Indirect Measure Assessment Activity</b>											
<b>Years Measured</b>	2016				2016	2016	2016 (1,2,6), 2017 (3)	2016	2019	2017	2017

## BSBA Assessment Schedule

Learning Outcome	2015-2016	2016-2017	2017-2018	2018-2019
<b>Program Goal 1 – Develop Effective and Ethical Leadership Behaviors</b>				
01) Students will analyze the effective qualities of a leader using organizational behavior frameworks.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
02) Students will evaluate personal leadership capacities and areas for future personal growth.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03) Students will identify and describe stakeholders across multiple sectors; connect ethical theory to stakeholder values; recognize and interpret societal context that influences stakeholders.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
04) Students will effectively communicate orally and in writing using various mediums across diverse situations.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Program Goal 2 – Innovative &amp; Creative Decision-making</b>				
05) Students will create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Program Goal 3 - Domain Concepts</b>				
06) <b>Accounting:</b> Students will use accounting concepts and principles in creating and analyzing financial statements of organizations.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07) <b>Finance:</b> Students will demonstrate ability to identify relevant information and apply specific knowledge and analysis skills to assess the economic value of real/financial assets or investment opportunities and make appropriate decision to create value.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
08) <b>Organizational Behavior:</b> Students will work effectively in groups and foster positive team dynamics.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
09) <b>Technology:</b> Students will describe the intertwined relationship among technology, information, and the organizational structure and operations in order to assess and evaluate the core technology concepts that enable sound organizational decision making.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10) <b>Marketing:</b> Students will be able to identify the core concepts of marketing – price, product, place, and promotion.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11) <b>Business Law:</b> Students will draw legal conclusions based on sound legal analysis; identify the elements of a valid, enforceable contract and defenses to contract formation; and, understand the nature and purposes of legal remedies.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12) <b>Strategy:</b> Students will develop specific and actionable strategic options to enhance the organization's position through analysis of the changes in its competitive environment, its industry/sector, and its internal resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Program Goal 4 - Global Orientation</b>				
13) Students will integrate diverse perspectives (e.g. cultural, religious, economic, political, historical, geographic, environmental) in decision-making.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# BSM Program

BSM Curriculum Map							
Map Curriculum to BSM Learning Outcomes by indicating with an 1, 2, or 3 in the appropriate box							
1 = Introduced							
2 = Moderate Coverage							
3 = Comprehensive Coverage							
BSM Curriculum							
BSM Learning Outcomes	Orientation	BSM 301 Public Policy and the Regulatory Environment	BSM 302 Marketing Principles	BSM 303 Systems and Technology	BSM 304 Foundations of Organizational Behavior	BSM 306 Business Analytics Fundamentals	BSM 309 Financial Accounting Fundamentals
<b>Program Goal 1 – Develop Effective and Ethical Leaders</b>							
<b>01)</b> Students will analyze the effective qualities of a leader using organizational behavior frameworks.					2		
<b>02)</b> Students will evaluate personal leadership capacities and areas for future personal growth.					2		
<b>03)</b> Students will identify and describe stakeholders across multiple sectors; connect ethical theory to stakeholder values; recognize and interpret societal context that influences stakeholders.		1					
<b>04)</b> Students will effectively communicate orally and in writing using various mediums across diverse situations.		1	1	2			
<b>Program Goal 2 – Innovative &amp; Creative Decision-making</b>							
<b>05)</b> Students will create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.				2		1	1
<b>Program Goal 3 - Domain Concepts</b>							
<b>06) Accounting</b> Students will use accounting concepts and principles in creating and analyzing financial statements of organizations.							2
<b>07) Finance</b> Students will demonstrate ability to identify relevant information and apply specific knowledge and analysis skills to assess the economic value of real/financial assets or investment opportunities and make appropriate decision to create value.							1
<b>08) Organizational Behavior</b> Students will work effectively in groups and foster positive team dynamics.					2		
<b>09) Technology</b> Students will describe the intertwined relationship among technology, information, and the organizational structure and operations in order to assess and evaluate the core technology concepts that enable sound organizational decision making.				2			
<b>10) Marketing</b> Students will be able to identify the core concepts of marketing – price, product, place, and promotion.			2				
<b>11) Business Law</b> Students will draw legal conclusions based on sound legal analysis; identify the elements of a valid, enforceable contract and defenses to contract formation; and, understand the nature and purposes of legal remedies.		2					
<b>12) Strategy</b> Students will develop specific and actionable strategic options to enhance the organization's position through analysis of the changes in its competitive environment, its industry/sector, and its internal resources.			1				
<b>Program Goal 4 - Global Orientation</b>							
<b>13)</b> Students will integrate diverse perspectives (e.g. cultural, religious, economic, political, historical, geographic, environmental) in decision-making.							
<b>Term Offered</b>				Spring	Spring	Spring	Spring
<b>Learning Outcome Measured</b>				LOs 3, 6, 7, 8, 10 & 11	LOs 1 & 2	LO 9	LOs 3, 6, 7, 8, 10 & 11
<b>Direct Measure Assessment Activity</b>				CBE Pre-test	Individual Case Analysis	Course embedded questions/problems	CBE Post-test
<b>Indirect Measure Assessment Activity</b>							
<b>Years Measured</b>				2016	2018	2017	2016

## BSM Assessment Schedule

Learning Outcome	2015-2016	2016-2017	2017-2018	2018-2019
<b>Program Goal 1 – Develop Effective and Ethical Leadership Behaviors</b>				
01) Students will analyze the effective qualities of a leader using organizational behavior frameworks.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
02) Students will evaluate personal leadership capacities and areas for future personal growth.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
03) Students will identify and describe stakeholders across multiple sectors; connect ethical theory to stakeholder values; recognize and interpret societal context that influences stakeholders.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04) Students will effectively communicate orally and in writing using various mediums across diverse situations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Program Goal 2 – Innovative &amp; Creative Decision-making</b>				
05) Students will create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Program Goal 3 - Domain Concepts</b>				
06) <b>Accounting:</b> Students will use accounting concepts and principles in creating and analyzing financial statements of organizations.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
07) <b>Finance:</b> Students will demonstrate ability to identify relevant information and apply specific knowledge and analysis skills to assess the economic value of real/financial assets or investment opportunities and make appropriate decision to create value.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
08) <b>Organizational Behavior:</b> Students will work effectively in groups and foster positive team dynamics.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
09) <b>Technology:</b> Students will describe the intertwined relationship among technology, information, and the organizational structure and operations in order to assess and evaluate the core technology concepts that enable sound organizational decision making.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10) <b>Marketing:</b> Students will be able to identify the core concepts of marketing – price, product, place, and promotion.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11) <b>Business Law:</b> Students will draw legal conclusions based on sound legal analysis; identify the elements of a valid, enforceable contract and defenses to contract formation; and, understand the nature and purposes of legal remedies.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12) <b>Strategy:</b> Students will develop specific and actionable strategic options to enhance the organization's position through analysis of the changes in its competitive environment, its industry/sector, and its internal resources.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Program Goal 4 - Global Orientation</b>				
13) Students will integrate diverse perspectives (e.g. cultural, religious, economic, political, historical, geographic, environmental) in decision-making.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



# MBA (existing Program)

## MBA Curriculum Map

Map Curriculum to MBA Learning Outcomes by indicating with an 1, 2, or 3 in the appropriate box

1 = Introduced

2 = Moderate Coverage

3 = Comprehensive Coverage

MBA Learning Outcomes	MBA Curriculum								
	MBA 6011 Managerial & Financial Accounting	MBA 6012 Ethics and Social Responsibility in Business	MBA 6013 Strategic Management in the Global Environment	MBA 6014 Leadership, Teams & Organizations	MBA 6015 Sustainable Supply Chain Management	MBA 6016 Marketing	MBA 6018 Spreadsheets and Business Analytics	MBA 6019 Managerial Finance	MBA 6102 Macroeconomics Business Conditions
<b>01) Fundamental Language and Skills</b> Students will display mastery of the fundamental language and skills of core business areas.	3	1	3	2	3	3	3	3	3
<b>02) Practical Problems</b> Students will apply theory to solve practical problems.	2	2	2	2	2	2	3	2	1
<b>03) Business Environment</b> Students will measure, analyze and interpret all aspects of the business environment.	3	2	3	2	2	2	3	2	3
<b>04) Legal, Ethical and Social Concerns</b> Students will integrate legal, ethical and social concerns into business decisions.	2	3	2	3	3	2	1	2	2
<b>05) Leadership and Communication Skills</b> Students will possess effective leadership and communication skills & strategies.	1	2	3	3	2	2	1	2	2
<b>06) Strategic Plans</b> Students will formulate and execute strategic plans.	1	1	3	2	2	3	1	3	1

Term Offered		Spring	Spring	Fall	Fall				
Learning Outcome Measured		LO 4	LO 5	LO 6	LO 1				
Direct Measure Assessment Activity		Case study with individual written assignment	Final project presentation	Course embedded assignment	Comprehensive exam				
Indirect Measure Assessment Activity									
Years Measured		2016 2018 (new LO)	2016 2018 (new LO)	2016	2016				

## MBA (existing program) Assessment Schedule

Learning Outcome	2015-2016	2016-2017	2017-2018
<b>01) Fundamental Language and Skills</b> Students will display mastery of the fundamental language and skills of core business areas.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	New LOs In fall 2017
<b>02) Practical Problems</b> Students will apply theory to solve practical problems.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>03) Business Environment</b> Students will measure, analyze and interpret all aspects of the business environment.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>04) Legal, Ethical and Social Concerns</b> Students will integrate legal, ethical and social concerns into business decisions.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<b>05) Leadership and Communication Skills</b> Students will possess effective leadership and communication skills & strategies.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>06) Strategic Plans</b> Students will formulate and execute strategic plans.	<input type="checkbox"/>	<input type="checkbox"/>	

# EMBA Program

Learning Outcomes		EMBA 6901 Negotiations	EMBA 6902 Leadership & Teams	EMBA 6903 Financial Accounting	EMBA 6904 Managerial Accounting	EMBA 6905 Finance	EMBA 6906 Global Business Conditions	EMBA 6907 Exec. Strategic Communications	EMBA 6908 Tech Trends	EMBA 6909 Business Law	EMBA 6910 Managerial Economics	EMBA 6911 Strategic Marketing	EMBA 6912 Dec. Modeling & Data Analysis	EMBA 6913 Supply Chain Management	EMBA 6915 Ethics & Social Responsibility	EMBA 6917 Entrepreneurship	EMBA 6919 Strategic Management	EMBA 6920 Applied Innovation	EMBA 6929 Change Management	EMBA 6952 Mgt. in the Global	EMBA 6987 Global Business Practicum
1	Discuss how self-awareness is central to leadership authenticity and effectiveness.	2	3					2							3		2	1	3	2	2
2	Assess team effectiveness for improved performance.	2	3				1	2	1	1				2	1		3	2	2	1	2
3	Communicate effectively in writing.	1	2			2	2	3	2	3	2	2	2	2	2		3	2	2	2	2
4	Communicate effectively orally.	2	2				2	3	2	3	2	2		2	1	3	3	2	2	2	2
5	Apply tools, models, and concepts of innovation to a business venture.						3		3		1		1		1	3	1	2		3	
6	Design fresh options for a product, process, system, or service.							1	3		2	2	2		1		2	3		1	
7	Analyze data/information to inform strategic decision-making.	3				1	3	1	3			3	3	3	3	2	3	1	2	3	
8	Assess the potential ethical implications of a business decision.	2	2	1	1		2	2	3	3	2	2	2		3	1	1	1	2	1	1
9	Evaluate the impact of business decisions on the well being of stakeholders, including the local and global environment.	3	2	1		2	2	1		2	1	2			3		3		2	1	3
10	Interpret the theories and principal features of the core business disciplines – accounting, finance, management, marketing, economics, business law, strategy, and operations.	2	3	3	3	3	3	1		3	1	3	1	1	1	3	3		2	3	2
Term Offered		Spring 1	Fall 1	Fall 1	Spring 1	Spring 1	Fall 1	Fall 1	Spring 2	Spring 2	Fall 2	Spring 1	Spring 1	Spring 2	Fall 2	Fall 2	Fall 2	Fall 1	Spring 2	Spring 2	Fall 2
Learning Outcome Measured			1					4					7		8	5	2	6		3	9
Direct Measure Assessment Activity			Paper w/ Rubric					Assign. w/ Rubrics					Assign. w/ Rubric		Paper w/ Rubric	Assign. w/ Rubric	Assign. w/ Rubric	Assign w/ Rubric		Paper w/ Rubric	Paper w/ Rubric
Indirect Measure Assessment Activity																					Student Survey
Years Measured			2017-18 2020-21					2017-18 2020-21					2018-19 2021-22		2018-19 2021-22	2018-19 2021-22	2017-18 2020-21	2016-17 2019-20		2016-17 2019-20	2016-17 2019-20
<p><b>Note:</b> Learning Outcome 10 to be assessed by standardized pre- and post-test in academic year 2017-18 (Cohort 28) and 2020-2021 (Cohort 31).</p>																					

## EMBA Assessment Schedule

Learning Outcome	2016-2017	2017-2018	2018-2019
1. Discuss how self-awareness is central to leadership authenticity and effectiveness.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Assess team effectiveness for improved performance.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Communicate effectively in writing.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Communicate effectively orally.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Apply tools, models, and concepts of innovation to a business venture.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6. Design fresh options for a product, process, system, or service.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Analyze data/information to inform strategic decision-making.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8. Assess the potential ethical implications of a business decision.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9. Evaluate the impact of business decisions on the well being of stakeholders, including the local and global environment.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Interpret the theories and principle features of the core business disciplines – accounting, finance, management, marketing, economics, business law, strategy, and operations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# MSOD Program

## MSOD Curriculum Map

Map Curriculum to MSOD Learning Outcomes by indicating with an 1, 2, or 3 in the appropriate box

1 = Introduced

2 = Moderate Coverage

3 = Comprehensive Coverage

MSOD Learning Outcomes	MSOD Curriculum						
	OD 660 Understanding Behavior in Organizations	OD 661 Leading Organization Change and Development	OD 668 Research and Analysis for Organization Development	OD 671 Consulting Practices	OD 672 Individual and Team Interventions	OD 673 Large-Scale Systems Transformation	OD 690 Organization Development Culminating Project
<b>Program Goal 1 - Understanding the Foundations, Theories and Models of OD</b>							
01) Students will become familiar with the key concepts, research, theories and models in OD.	3				1		3
02) Students will apply OD theories and models to change interventions in organizations.		3			1		3
<b>Program Goal 2 - Ability to Lead Change and Use Self-as-Instrument</b>							
03) Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.	1	1	2	3	1		3
04) Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.	1	1	1	3	1	1	3
<b>Program Goal 3 - Proficiency in Organizational Inquiry, Research and Analysis</b>							
05) Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).			3				3
06) Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.			3		1	1	3
<b>Program Goal 4 - Competence with Teams, Culture and Diversity</b>							
07) Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.			2		3	1	3
08) Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.	1				2	2	3
<b>Term Offered</b>	Spring		Spring			Spring	Spring
<b>Learning Outcome Measured</b>	LO 3		LOs 5 & 6			LOs 1, 4, & 6	LOs 2, 7, & 8
<b>Direct Measure Assessment Activity</b>	Individual course embedded assignment		Individual course embedded assignment			Individual course embedded assignment	Culminating project group presentation and individual paper assignment
<b>Indirect Measure Assessment Activity</b>							
<b>Years Measured</b>	2017		2017			2017	2017

## MSOD Assessment Schedule

Learning Outcome	2015-2016	2016-2017	2017-2018
<b>1a Understanding the Foundations, Theories and Models of OD</b> Students will become familiar with the key concepts, research, theories and models in OD.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>1b Understanding the Foundations, Theories and Models of OD</b> Students will apply OD theories and models to change interventions in organizations.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>2a Ability to Lead Change and Use Self-as-Instrument</b> Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>2b Ability to Lead Change and Use Self-as-Instrument</b> Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>3a Proficiency in Organizational Inquiry, Research and Analysis</b> Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>3b Proficiency in Organizational Inquiry, Research and Analysis</b> Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>4a Competence with Teams, Culture and Diversity</b> Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>4b Competence with Teams, Culture and Diversity</b> Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# MGEM Program

Map Curriculum to MGEM Learning Outcomes by indicating with an 1, 2, or 3 in the appropriate box  
 1 = Introduced  
 2 = Moderate Coverage  
 3 = Comprehensive Coverage

MGEM Learning Outcomes	MGEM Curriculum														
	MGEM 5101 Global Environment & Business Trends	MGEM 5102 Technology Appreciation & IP Management	MGEM 5123 Common Ground In Company Valuation and Accounting	MGEM 5104 Cross-Cultural Mgt and Ethical Bus. Practice	MGEM 5105 Operations Mgt. and Supply Chain Mgt. with a Global Perspective	MGEM 5106 Corp. Finance with a Global Perspective	MGEM 5107 Innovation and Technology Management	MGEM 5108 Global Competitiveness, Entry Barriers, and Strategic Alliance	MGEM 5109 Cross Cultural Marketing and Integrated Market Communication	MGEM 5110 Global Distribution and Channel Management	MGEM 5111 Social Entrepreneurship	MGEM 5112 Venture Capital, Corporate Entrepreneurship, and Micro Financing	MGEM 5113 Consulting Projects	MGEM Business Plan Course	MGEM U.S. Consulting Course
<b>01) Lead and Manage Diverse Individuals</b> Demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.	2			2	2			2	2	2	2	1	3	3	3
<b>02) Identify the Ethical and Professional Responsibilities</b> Identify ethical and professional responsibilities of a global entrepreneur.	2	3	1	3	2	2	2	2	2	2	2	2	3	3	3
<b>03) Effective Communication</b> Communicate effectively verbally and in writing across different media.	2	2		2	2	1	2	2	3	2	3	1	3	3	3
<b>04) Demonstrate and Apply Knowledge</b> Demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions.	3	2	1	3	3		2	3	3	2	3	2	3	3	3
<b>05) Identify and Analyze Financial Information</b> Identify and analyze financial information to make effective managerial decisions.			3			3					1	3	2	2	2
<b>Term Offered</b>	Fall 1	Fall 1	Fall 1	Fall 1	Spring 1	Spring 1	Spring 1	Spring 1	Summer 1	Summer 1	Summer 1	Summer 1	Fall 1	Spring 1	Summer 1
<b>Learning Outcome Measured</b>				LO 1, LO 2	LO 3	LO 5	LO 1		LO 4		LO 1, LO 2, LO 3	LO 5		LO 1, LO 3	LO 1, LO 2
<b>Direct Measure Assessment Activity</b>				Qualitative Exams	Paper scored by rubric	Final Exam	Research Paper Case Analysis				Case Analysis Final Proj. Pres.	Final Exam		Final Proj. Pres.	Final Proj. Pres.
<b>Indirect Measure Assessment Activity</b>															Student Survey
<b>Years Measured</b>				2016 2017 2018	2016 2017 2018	2016 2017 2018	2016 2017 2018		2016 2017 2018		2016 2017 2018	2016 2017 2018		2016 2017 2018	2016 2017 2018

## MGEM Assessment Schedule

Learning Outcome	2015-2016	2016-2017	2017-2018
<b>01) Lead and Manage Diverse Individuals</b> Demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.	☒	☒	☒
<b>02) Identify the Ethical and Professional Responsibilities</b> Identify the ethical and professional responsibilities of a global entrepreneur.	☒	☒	☒
<b>03) Effective Communication</b> Communicate effectively both verbally and in writing, using different media.	☒	☒	☒
<b>04) Demonstrate and Apply Knowledge</b> Demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions.	☒	☒	☒
<b>05) Identify and Analyze Financial Information</b> Identify and analyze financial information to make effective managerial decisions.	☒	☒	☒



# MSFA Program

## MSFA Curriculum Map

Map Curriculum to MSFA Learning Outcomes by indicating with an 1, 2, or 3 in the appropriate box

1 = Introduced

2 = Moderate Coverage

3 = Comprehensive Coverage

MSFA Learning Outcomes	MSFA Curriculum																					
	MSFA 710 Micro-economics for Finance Orientation	MSFA 712 Financial Markets	MSFA 714 Corporate Finance	MSFA 716 Macro-economics for Finance	MSFA 720 Equity Valuation	MSFA 722 Fixed Income Valuation I	MSFA 723 Applied Investment Analysis	MSFA 724 Derivatives I	MSFA 725 AGI: US Financial Markets & Regulation	MSFA 726 Advanced Financial Statement Analysis	MSFA 728 Ethics & Finance I	MSFA 730 Behavioral Finance for Risk Management	MSFA 732 Derivatives II	MSFA 734 International Finance	MSFA 736 Econometrics	MSFA 738 Fixed Income Valuation II	MSFA 740 Capital Market Theory	MSFA 742 Alternative investments	MSFA 744 Financial Econometrics	MSFA 746 Portfolio Management	MSFA 748 Ethics & Finance II	
<b>1-1 Analytical Tools – Finance</b> Employ fundamental quantitative techniques essential in financial analysis and investment management including (i) the time value of money, (ii) the basics of statistics and probability theory, (iii) probability theory applied in the field of investment valuation and financial risk management, and (iv) joint behavior of two or more variables, including correlation and linear regression.	1	1	1	1											3				3			
<b>1-2 Analytical Tools – Economics</b> Recognize and explain how macroeconomic and microeconomic events impact key components of economic activity, including industry structure, firm profitability, macroeconomic output, prices, interest and exchange rates.	3	1		2		3	3		3					3								
<b>1-3 Analytical Tools – Accounting</b> Describe and interpret financial accounting concepts and measurements to (i) use financial statements and footnotes to analyze an investment valuation; ii) analyze a company's liquidity, profitability, financial stability, solvency, and asset utilization; and iii) analyze the effects of alternative accounting methods and assumptions on firm valuation.		1	1		2		3		3													
<b>2-1 Integration - Equity Valuation</b> Discuss and evaluate the techniques used to analyze the value of equity investments, in securities markets using efficient market theory and the analysis of risk and return in equity portfolios.	1	2	2		3		3		3	3											2	
<b>2-2 Integration - Fixed Income Valuation</b> Analyze fixed income investments using the characteristics of bonds and factors that influence bond yields. Develop strategies for fixed income portfolios.		1				2		2					3			3					2	
<b>2-3 Integration - Derivatives Valuation</b> Analyze the sources of value in derivative investments, including forwards, futures, options, and swaps, and demonstrate how derivatives are used to manage risk in the investment process.							3						3				2				2	
<b>3-1 Ethics – Standards</b> Describe the framework for ethical conduct as set out in the CFA Institute Code of Ethics and Standards of Professional Conduct and Global Investment Performance Standards (GIPS®).		1							1, 2		2										2	
<b>3-2 Ethics – Evaluation</b> Evaluate and assess how these standards have, or have not been, followed in specific investment situations. Discuss how the CFA ethical standards relate more broadly to ethical values.		1							2		3	2									2	3
<b>3-3 Ethics - Duties to Investors</b> 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.		1	1														1	2			3	3
<b>Term Offered</b>				Fall						Fall	Fall				Fall						Fall	
<b>Learning Outcome Measured</b>				LO 1-2						LO 1-3	LO 3-1				LO 1-1						LO 3-3	
<b>Direct Measure Assessment Activity</b>				Pre/post test and individual course project						Individual paper assignment	Pre/post test				Pre/post test						Individual course presentation	
<b>Indirect Measure Assessment Activity</b>																						
<b>Years Measured</b>				2017						2017	2018				2018						2017	

## MSFA Assessment Schedule

Learning Outcome	2015-2016	2016-2017	2017-2018
<b>1-1 Analytical Tools</b> Finance Employ fundamental quantitative techniques essential in financial analysis and investment management including (i) the time value of money, (ii) the basics of statistics and probability theory, (iii) probability theory applied in the field of investment valuation and financial risk management, and (iv) joint behavior of two or more variables, including correlation and linear regression.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>1-2 Analytical Tools</b> Economics Recognize and explain how macroeconomic and microeconomic events impact key components of economic activity, including industry structure, firm profitability, macroeconomic output, prices, interest and exchange rates.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>1-3 Analytical Tools</b> Accounting Describe and interpret financial accounting concepts and measurements to (i) use financial statements and footnotes to analyze an investment valuation; ii) analyze a company's liquidity, profitability, financial stability, solvency, and asset utilization; and iii) analyze the effects of alternative accounting methods and assumptions on firm valuation.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>2-1 Integration</b> Equity Valuation Discuss and evaluate the techniques used to analyze the value of equity investments, in securities markets using efficient market theory and the analysis of risk and return in equity portfolios.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>2-2 Integration</b> Fixed Income Valuation Analyze fixed income investments using the characteristics of bonds and factors that influence bond yields. Develop strategies for fixed income portfolios.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>2-3 Integration</b> Derivatives Valuation Analyze the sources of value in derivative investments, including forwards, futures, options, and swaps, and demonstrate how derivatives are used to manage risk in the investment process.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>3-1 Ethics</b> Standards Describe the framework for ethical conduct as set out in the CFA Institute Code of Ethics and Standards of Professional Conduct and Global Investment Performance Standards (GIPS®).	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>3-2 Ethics</b> Evaluation Evaluate and assess how these standards have, or have not been, followed in specific investment situations. Discuss how the CFA ethical standards relate more broadly to ethical values.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>3-3 Ethics</b> 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.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## **Appendix F. New MBA Program Structure**

### **New MBA Program Structure**

The new MBA program contains several innovations. Courses are shortened to a more modular format, and will normally be 2 units rather than 4 previously. This will allow students to take additional elective courses to customize their learning. All students will take an innovative Career Accelerator Platform (CAP) that is designed to give them depth in an area of business that spans disciplinary silos, brings in industry professionals to interact with students, and includes a practicum project in a local company. In their second year, students are required to perform an external innovation project. Students are required to establish a personal advisory board.

An extensive co-curriculum, such as an Integrative Exercise in the first year and a Careers module is also included. We are creating a completely redesigned MBA Preterm/Orientation. The Preterm program includes a Presentation Skills workshop, two opportunities for students to present, team building exercises, a design-based thinking activity, career management workshops, an ethics discussion, and cross-cultural communications activity.

### **Elements of the New MBA Program Based on Assurance of Learning Findings in the Existing Program**

Assurance of Learning findings from the existing MBA program have deeply informed the design of the new MBA program. For example, we discovered that student presentation skills are not as good as we would like (see AY 15/16 LO5 assessment report). In the new program we are bringing in a course on Leadership Communication; we have a module on presentation skills in the pre-term; and students will give presentations in their Accelerator practicum and innovation project.

We recognized that students' ability to integrate across functional areas was weaker than we would like, and indirect measures from an Integrative Exercise (AY 14/15 MBA Integrative Exercise Assessment Report) taught us that students valued integrative learning. Therefore, we are establishing a new Capstone course, which includes integrative activities. In addition, we are building into the new program an Integrative Exercise.

We identified that many students believe that social engagement should feature more prominently in our program. To provide a vehicle for social innovation, we are establishing a new, Innovation Project where students have the opportunity to create something that benefits a community (which could be local or anywhere in the world). Because our assessment indicates that there are students who are not motivated to do a social/community project, we allow them to work in any organization.

We determined that project work in real-world settings is important for student success, so we are building in to the program a practicum project in the Career Accelerator, plus the Innovation Project.

We recognized that as a Jesuit School students should engage in reflection, and are rolling out a set of Management Exercises (one each semester), a secular version of the Ignatian Spiritual Exercises, which requires students to reflect on their experiences and write individual reflection

papers. We are requiring and supporting students to establish a personal advisory board to support their reflective development.

We recognized that there were “process” issues with AOL in the existing program, for example that rubrics were sometimes not available for some assessments. We have built into the work plan a commitment to create rubrics very early in the build out.

We identified that faculty tend to think primarily in terms of “course” rather than “program”. We are bringing in a new organizational structure (discussed below) to address this.

### **New Organization and Responsibility for Assurance of Learning**

The arrival of a very effective MBA director has proved helpful and has highlighted the value of program-level thinking. However, it is clear that we need to establish a shared sense of faculty ownership to take responsibility for integration, quality, and assessment of the MBA program. We will do something similar to what a department does for our departmentally-based degree programs. Faculty, gathered together in a stable multi-year relationship, work under the general supervision of leadership specifically charged to provide oversight of the program.

#### MBA Implementation Team: New organization with a new culture

In Fall 2016 the School is setting up an MBA Implementation Team (or “MITY” pronounced “mighty”). MITY’s charter will be to take a “program level” perspective on the MBA and ensure quality, integration, and assessment of academics, with due concern for the overall student experience. The team will comprise members drawn from the departments that contribute to the MBA, at least one member from the AoL committee, and (critically important) the MBA Director as co-chair with a faculty member. (Note that is the School of Management culture that curriculum committees are co-chaired by a faculty member and a staff member *ex officio*.)

Our approach is one of “faculty leadership under staff direction”. We must fully harness the experience and vision of the MBA Program Director, while ensuring that the MITY faculty are closely engaged with the program as a whole.

To ensure continuity, MITY members will serve staggered, multi-year terms. MITY members might or might not be teaching in the MBA program during any given semester, but will remain active in the Team every semester. Over time, a small number of new faculty who will soon be teaching in the MBA program might become MITY members in order to come up to speed on program-level concepts *prior* to teaching their first course.

The MITY will have as a core task the development and implementation of assessment activities, the communication of assessment results, and identification and implementation of responses and changes (“closing the loop”) at the appropriate places in the program. The Team will serve as the natural venue for “broad discussions of assessment results” – an issue identified by the AACSB review team as a need -- and will work closely with the AoL committee, facilitated by having an AoL Committee member on the Team.

In addition, the MITY will support the CAPs, the Integrative Activity, cross-course integration each semester, and the co-curriculum. Operationally, it will function much like an “MBA Department”. The MITY will rely heavily upon the professional skills, vision and experience of the MBA Program Director, who has deep expertise honed at other universities in all aspects of

assessment. The MBA Program Director will be key to helping the faculty make the transition from course-level to program-level thinking, assessment, and loop-closing.

#### MITY Leadership Responsibilities Related to Assurance of Learning

The leadership of the MITY will have as an important priority the establishment a new program-focused faculty culture, with sustained engagement by MITY members even in semesters when they are not teaching in the MBA, along with regular program-level engagement with faculty in their respective academic departments. This is central to the ability to make assurance of learning part of the faculty's "base business".

There is a lengthy task list related to the development and launch of the new program and MITY will be closely involved. With regard to AOL, MITY will need to support and influence the creation of ten new departmentally-based core courses, insuring that they are based on the program goals and learning outcomes; this requires multi-relationship engagement by MITY members and leadership with faculty, departments and department chairs. We need to be sure that assessment is "baked in" to core courses when they are designed. We also want to insure that assessment is integral at design time for other curriculum components, including the new capstone course, the Innovation Project, the Management Exercises, and the Personal Advisory Board.

After the program is developed, we need to deliver it, assess it, and improve it. This will occur while the old program will continue to run in parallel as it teaches out. We will perform assessment (according to the plan) during the first year of the new program. After the first year of the new program, MITY will review assessment data and other information, and identify changes to enhance academic quality and the overall student experience. We intend to perform "iterative development" of courses, so there will be many changes we can make to a course prior to its second offering.

Some activities will need to be based in disciplinary departments. MITY leadership will insure strong, transparent relationships with the departments to ensure open communication, yield good outcomes, and minimize duplication of effort and misunderstandings.

#### **Assurance of Learning Work plan and Process**

This section explains how we will build out the AOL structure for the new MBA program. It is based on the findings of our previous AOL efforts, and in particular explicitly addresses the weaknesses and speed bumps we encountered doing AOL in the existing MBA program.

#### Preparation: Rubrics as part of the program build-out

One of the issues surfaced in the old program was that rubrics were sometimes not available for assessments. We shall prevent this problem recurring in the new program.

During 2016-17 The MITY will devise a rubric for each learning outcome during 2016-17. These rubrics will be devised "in conversation" with the detailed design of courses. The expertise of the MBA Director will be important for the effectiveness of these rubrics. Training will be provided to help faculty on the Team understand how a program-level rubric can be operationalized for their course (this has been a challenge in the past).

#### Planning: Five-year assessment plan

During 2016-17, MITY will devise a Five-Year Assessment Plan. Each learning objective will be directly assessed twice during this time period. The intention is that the plan will “cycle” every five years. However, because this is a new program with many innovative features, it is likely that the assessment plan will need to be revisited around year three as we learn over time.

The Five-Year Assessment Plan will specify, for each year, the learning objectives to be assessed, and the courses where direct measures shall be obtained. Individual achievement will be the focus of these assessments. The Five-Year Assessment Plan will specify, for each year, a set of indirect measures. This will include a description of the measures and where and when they shall be obtained.

The plan will include an Assessment Schedule (see Appendix) that indicates for each course the year and term that an assessment is to be done in that course, the learning outcome, and a brief description of the assessment activity. The plan will be devised after course sequencing and the curriculum map are finalized.

#### Direct Assessment

Each year, the assessment plan will be reviewed by the MBA Implementation Team. The MITY will identify the relevant courses, sections, and instructors for direct assessment and contact the instructors. We recognize that best practice is bringing in assessors who are not the instructor of record, and we will take steps to move towards this approach. Review of the learning objective and corresponding rubric (which will have been created in 2016-17) will help the instructors determine how the program-level rubric can be operationalized for their course.

Upon completion of the assessment, the faculty member will put the results into a standardized Assessment Report format, with assistance from the MBA Director and the AOL Committee. An initial review of assessment results will be done by the faculty member and MITY leadership to confirm the assessment generated meaningful results. If not, we will try to make adjustments or reassess to get meaningful results prior to review by the full MITY.

#### Indirect Assessment

The MBA Program Director will insure that indirect measures are assessed according to the assessment plan.

#### Review and Changes by the MBA Implementation Team

The full MITY will review all assessment results each year, and will work together to identify areas where responsive change might be made, to specify what those changes should be, and to identify the course (or co-curricular) where a change is merited those changes. Once changes are identified, the Team will specify a timeline for them. Results will be summarized in an annual report.

Engagement with the appropriate academic department chair and departmental faculty will be undertaken to identify a faculty member(s) who will make the specified changes. If the change is in the co-curriculum, the appropriate staff will be contacted by the MBA Program Director.

MITY will confirm at the next offering of the course or of a program in the co-curriculum that any planned changes were implemented. The results will be a summarized in a standard Loop Closing report, which will correspond to the earlier Assessment Report. Follow-up assessment that is not in the Five-Year Assessment Plan may be performed if necessary.

# MGEM Annual Program Meeting

IQS-FJU-USF  
August 16, 2016

## Program Assessment: Indirect Measures (IM)

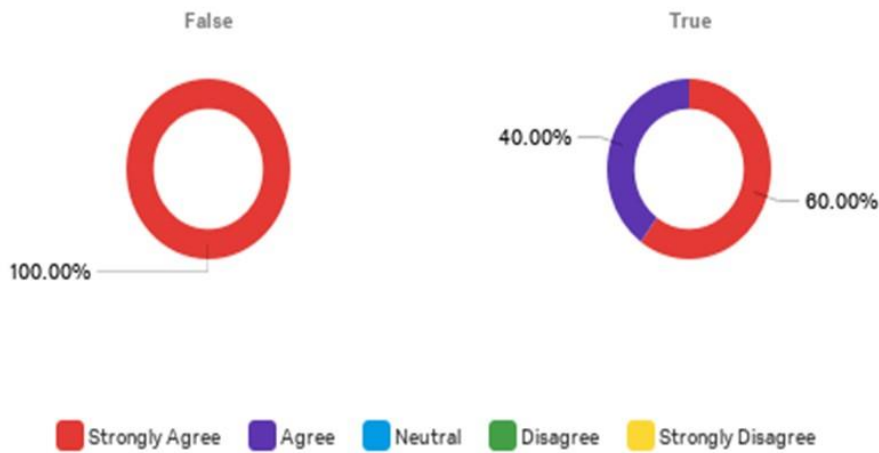
- Program surveys of MGEM cohorts (three schools)
- Course evaluations
- Student focus groups
- Individual feedback
- Administration/ staff observations
- Need to share data/reports from IM across the three (3) schools more consistently

### 2016 MGEM End of Program Survey-USF (Indirect Measures)

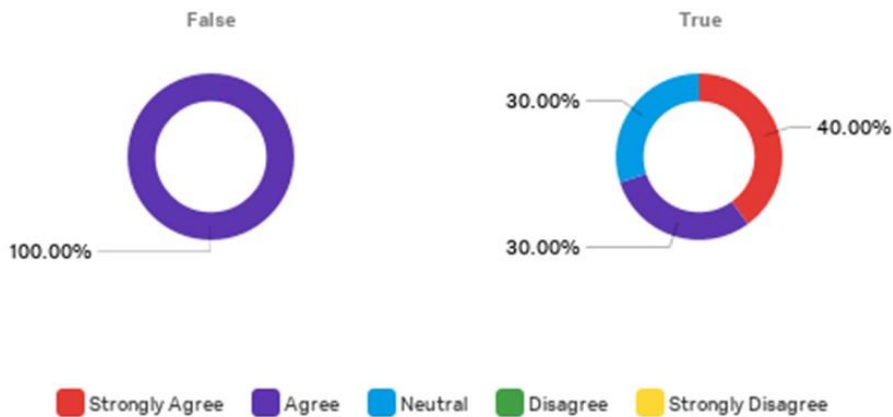
- Administered in July of 2016
- Three reminders were sent; the questionnaire is still open
- N=11 responded thus far (27.5%)
- No cross-campus comparison can be made at this time
- The survey needs to be administered closer to the end of MGEM to minimize bias



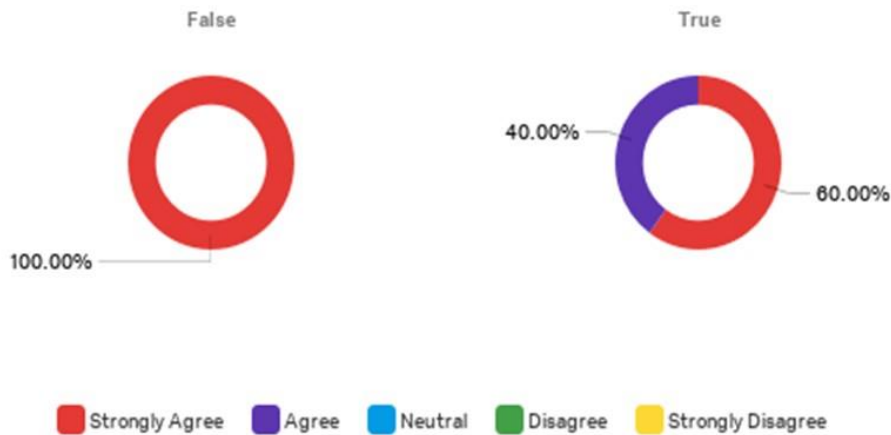
Q1: Through the MGEM Program, I now have a greater ability to become passionate, ethical and an effective global leader.



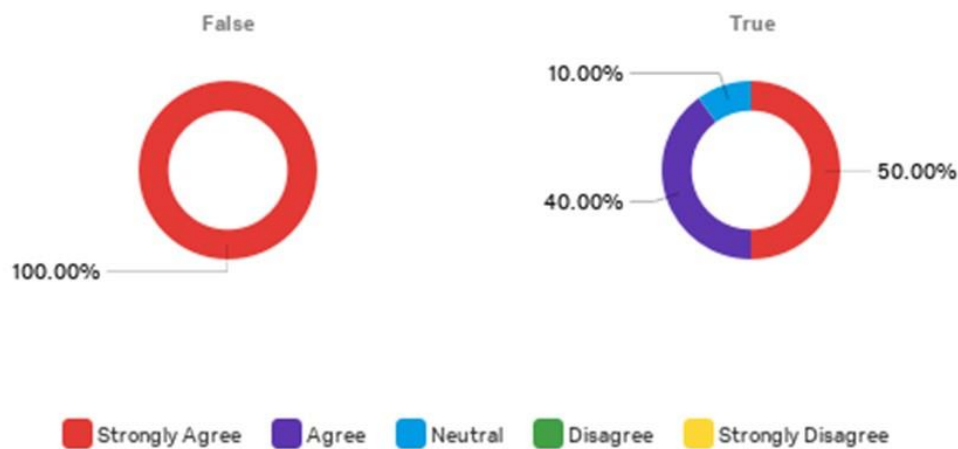
Q2: Through the MGEM Program, I have a higher skill level to create and implement ideas for a new product or service.



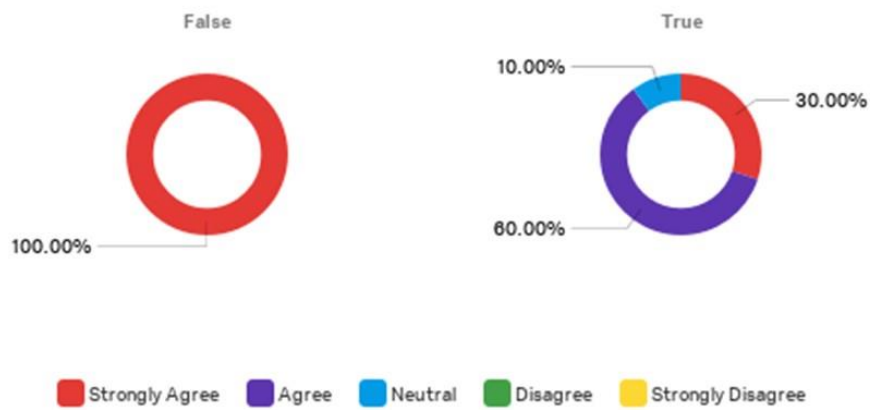
Q3: Through the MGEM Program, I have increased my analytical, entrepreneurial and communication skills that can be applied to helping a company expand their reach into new market areas.



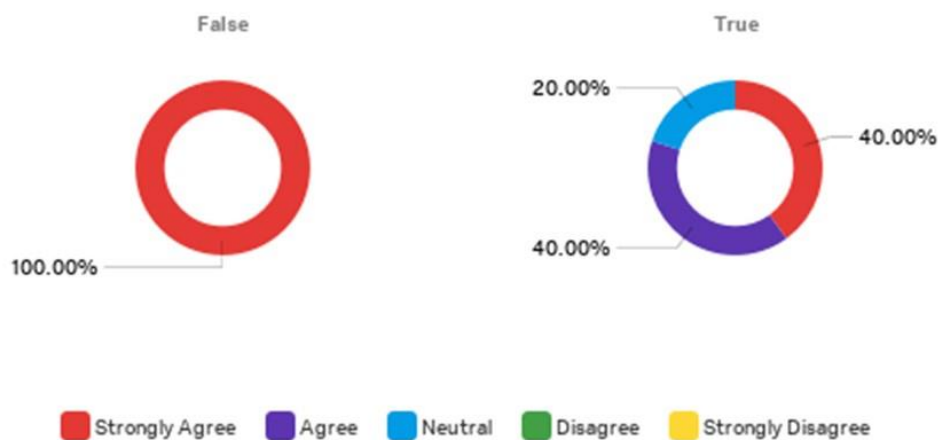
Q4: Through the MGEM Program, I have learned to lead and manage diverse individuals to facilitate organizational performance.



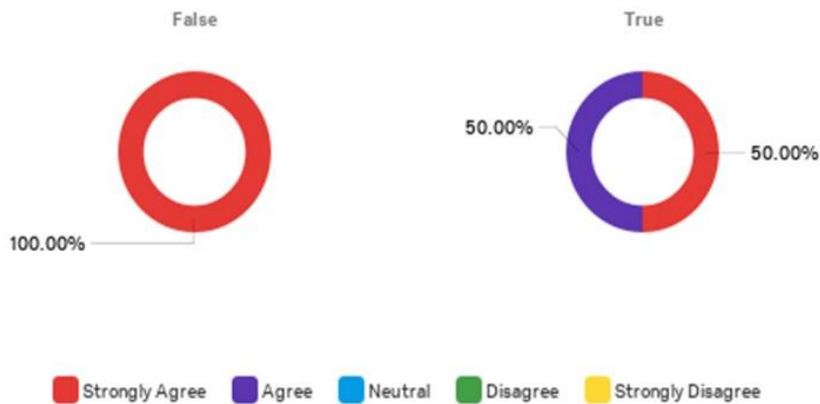
Q5: Through the MGEM Program, I have learned to identify the ethical and professional responsibilities of a global entrepreneur.



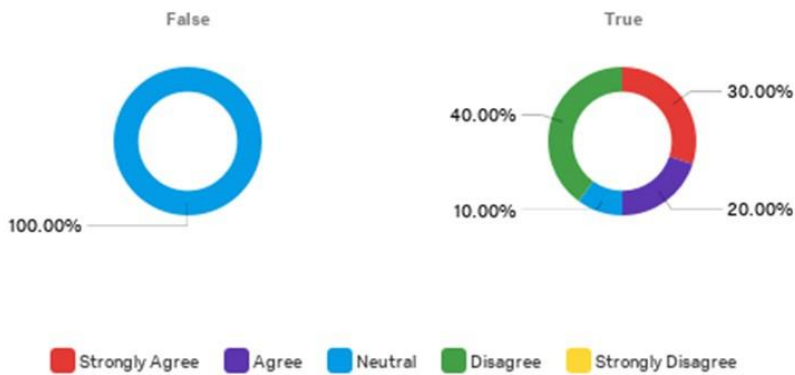
Q6 - Through the MGEM Program, I have learned to communicate effectively both verbally and in writing, using different mediums.



Q7 - Through the MGEM Program, I have learned to demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic and environmental factors in business decisions.



Q8 - Through the MGEM Program, I have learned to identify and analyze financial information to make effective managerial decisions.



## Q9: What is the single most valuable thing you have learned during the MGEM

- Deal with cultural differences / issues and find the best way to achieve the proposed goal.
- The MGEM program helps me to connect with people from different countries, improving communication barriers and creating strong cross-cultural teams.
- 1. Understanding the differences between each other and become more adaptable and opening to heard more stories behind every person.
- 1. Understand the difference in culture and people, become more adaptable and more humbly to learn from others.  
2. Throughout many projects, we know how to communicate better and get things down more efficient and high quality.  
3. Gaining analyze skills and express our own opinion.
- working as a team and consulting work
- Being part of such an international group and overcoming cultural differences.
- The MGEM program helps me to connect with people from different countries, improving communication barriers and creating strong cross-cultural teams.
- The single most important thing that I have learned is how to produce financial statements and pro formas.

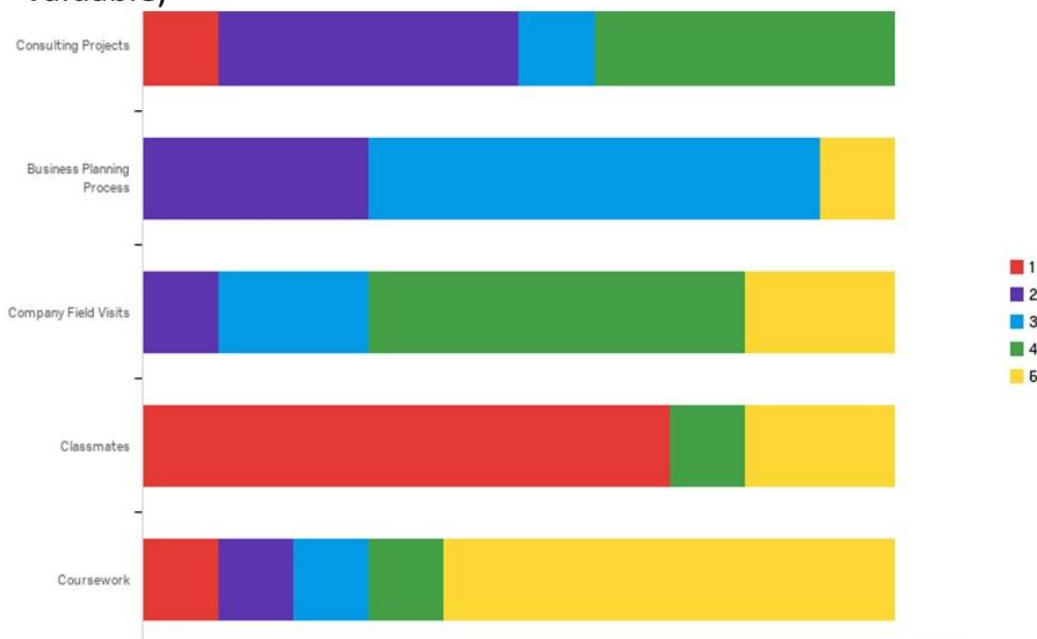
## Q10 - What area of the MGEM Program Curriculum do you feel you have the biggest knowledge gap in?

- Finance
- English professional communication, even for native English speakers, a course of how to communicate on every way wood be good. Especially Asian people who looks like they never did a presentation in their lives
- There is a very clear gap on finance. Students with financial knowledge don't learn anything and students without the knowledge don't understand anything of the content in the lectures.  
There is a lack of marketing knowledge and practical knowledge on how to face the regulations to start a business.
- Business analysis
- Finance
- Finance, the courses in Barcelona and San Francisco definitely lacked leadership, organization and clarifications.  
The learning was quite poor, only people who had finances background could complete the projects, while the rest of the students wouldn't feel engaged which made it quite unfair in groups projects.  
Finance is probably the most complicated discipline for non-business people and professors should put a lot more effort to motivate students and give structured lectures
- Finance
- Supply Chain and Logistics

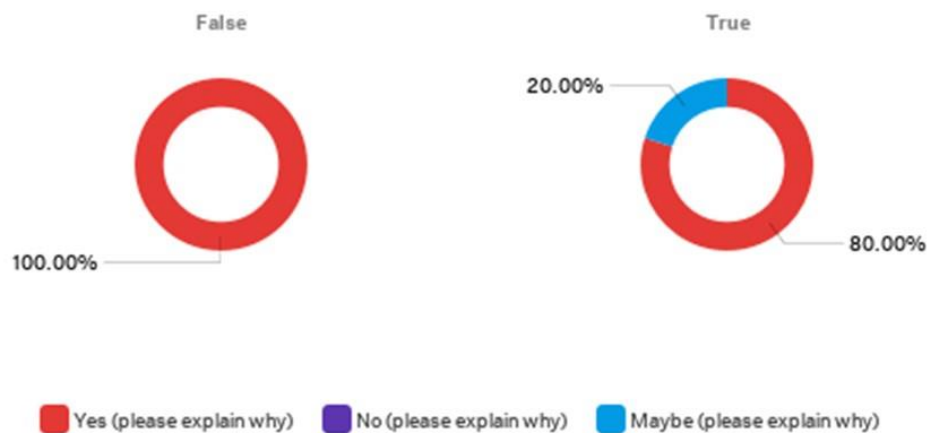
## Q11 - How has the knowledge you gained in the MGEM Program changed your professional preparedness?

- We now have a great set of tools and different ways to apply it on the real world.
- By providing how things are in the world and how innovation and planning are really important
- I definitely gained a lot in terms of leadership through groups projects, it gave me more confidence about taking initiatives and making decisions. I feel more prepared for the real work and taking important responsibilities in my future job.
- 1. I have gained strong organizational and time management skills  
2. Consulting project make us to go into the real world and know what are the company is doing.  
3. Before, I am not familiar with any supply chain management concept and my background is marketing. When facing a problem or situation, I found myself usually use customer performance or marketing aspect to think of the solution. And after taking the course in USF, I learned how to use more complete picture to come up a solution from demand to the market. It really helped!
- I studied my undergraduate degree in business administration specialized marketing. However, I am not very familiar with supply chain management concept. Until the second semester starts in San Francisco, the supply chain management professor's teaching style makes the concepts into real practice and become more interesting. While thinking about business or case studies, I will thought about not just from the customer side or promotion side, but also the demand and inventory run in the company side also.

## Q12 - Please rank order what has been most valuable within the MGEM Program (1 being most valuable and 5 being least valuable)



### Q13 - Would you recommend a friend to the MGEM Program?



### Q14 - What would you suggest as an improvement to the program for future cohorts?

- 1. Three universities can discuss more details about the course insight. Because some courses we did early in Barcelona, in other semester in Taiwan or San Francisco the concept being addressed again. I think most of the people want to learn more knowledge and spend the class, however due to the topic is being covered before, some classmates started not being too engaged in the class.
- 2. Group is the key thing to create the relationship for MGEM. I think the very important point for MGEM become such a family is that from Barcelona. The school make the team for us and become supper diverse. Moreover, during whole semester and project, we all work on the same group. Thus, each group will meet at least 2 days a week, we know each other more and doing works done.
- 3. Throughout the MGEM program, our main focus is on business analysis. This is great, we've gained strong organizational and presentation skills. However, I would be very grateful if I have earlier learn Marketing and Supply Chain Management courses at the beginning of the semester will be beneficial to do the analysis.

## Q14 - What would you suggest as an improvement to the program for future cohorts?

- Better communication between the schools!!  
Each school only handles a program of 3-4 months but for us it is one full academic year, we need more structure in some classes and a real follow-up.  
We don't want to review the same things in Barcelona, Taipei and San Francisco. We'd rather capitalize on what has been learnt already and moving on to something new.  
Professors appear not to know what's happened in other schools.
- The three universities must cooperate more because I feel like some classes are so repetitive. I would suggest providing feedback for presentation skills, writing and overall professionalism early on to set a precedent for the cohort moving forward.
- I would suggest following an individual business plan and applying the content of it. I see a very big disconnection between the universities. The content is the same in many courses and some interesting and more complex topics are not explained clear because of the repetition of basic concepts.  
Finance is a very weak point. I will suggest either ask for a finance previous knowledge before starting the program or starting teaching concepts from zero and in progress and not recommend the program for people with financial knowledge since they are not going to learn anything.  
The thesis is a waste of time since there is not a real knowledge learn on it

## Summary of the Remaining Student Feedback

- The program design/ universities' partnership are unique and valuable
- Cohort diversity and experiences are the most profound overall areas of strength
- Consulting projects and possible internships are the most valuable learning experiences
- China trip must stay (though clearly announced in advance)
- Most of the students enroll in hopes to get a job in the U.S.
- Perceptions of inequality and inconsistency in treatments among some minority students



## Program Assessment: Direct Measures (DM)

- Course-based assessments (MGEM implemented)
- Assignments- case studies (preferably individually assessed), analytical papers, tests (MGEM)
- Consulting projects assessment: pre- and post (MGEM)
- Possible standardized tests (inventories) to be administered in the beginning and at the end of the program (pre- and post); imbedded in courses
- Faculty individual qualitative assessment on the basis of their individual courses- recommendations (MGEM)

## The MGEM Program Goals: is revision necessary?

- Prepare students to be passionate, ethical and effective global leaders.
- Instill multi-cultural fluency by participation in a cultural diverse student cohort, multi-cultural and multi-lingual faculty and the opportunity study in Asia, Europe and North America.
- Teach the students the skills necessary to develop a unique idea for a new business or a new product and or service within an existing firm.
- Develop students' analytical, entrepreneurial, and communication skills by advising companies on how to expand their reach into new markets.

## MGEM Program Learning Outcomes (LOs)

1. Demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.
2. Identify the ethical and professional responsibilities of a global entrepreneur.
3. Communicate effectively both verbal and in writing, using different media.
4. Demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions.
5. Identify and analyze financial information to make effective managerial decisions.

### LO1: Lead and manage diverse individuals and groups to facilitate organizational performance.

- MGEM 5114 - Business Plan Course - FJU (Business Plan, **at least 80% met (good) or exceeded** expectations (no averages provided)
- MGEM 5107- Innovation and Technology Management-FJU (a variety of assignment), **at least 95% met (good) or exceeded** expectations (no averages provided)
- MGEM 5104 -Cross-Cultural Management and Ethical Business Practice- IQS- **average performance 2.21 (3-point scale)** based on case exercises; over 80% met or exceeded as stated.
- MGEM 5111 -Emerging Trends in Entrepreneurship and Innovation –Social Entrepreneurship- USF- Case Study Presentation- **average performance- 2.15- 67% met or exceeded expectations**
- MGEM 5115 -U.S.F Consulting Course- Final Presentation (MGEM Post-Test)- 2 faculty assessment- **average 2.45- 91% met or exceeded**
- **Overall: 82.5 met or exceeded; 2.27 average performance (3 courses)**

## LO1: Proposal/loop closing

- A more consistent and applicable rubric for the LO1 to be created and distributed
- Data should be more consistently collected (precise averages, ranges, and percentages)
- More effective team and individual exercises (assessment methods) to be developed to practice and test leadership and diversity acumen separately in each of the courses mentioned and to be focused not on the content but also on the process (experiential)
- More individualized work/ coaching with teams

## LO2: Identify the ethical and professional responsibilities of a global entrepreneur.

- MGEM 5104 -Cross-Cultural Management and Ethical Business Practice- IQS- **average performance 2.09 (3-point scale)** based on case exercises; over 80% met or exceeded as stated.
- MGEM 5102 -Technology Appreciation and IP Management- IQS- **average performance 1.91 (3-point scale)** based on in-class tests (2)- a .08 improvement between the first and the second tests; **72.5% met or exceeded expectations (the target was not met).**
- MGEM 5111 -Emerging Trends in Entrepreneurship and Innovation –Social Entrepreneurship- USF- Final Exam- **average performance- 2.65- 84% met or exceeded expectations**
- MGEM 5115 -U.S.F Consulting Course- Team Projects (MGEM Post-Test)- 2 faculty assessment- in progress.
- **Overall: 78.8 met or exceeded; 2.22 average performance (3 courses)**

## LO2: Proposal/loop closing

- A more consistent and applicable rubric for the LO2 to be created and distributed
- Data should be more consistently collected (precise averages, ranges, and percentages)
- More effective team and individual exercises (assessment methods) to be developed to practice ethical and professional competencies separately in each of the courses mentioned and to be focused not on the content alone but mostly on the process (experiential)
- More frequent assessment via a variety of methods (cases, tests, simulations, etc) to track progress.

## Appendix H. AY 2015/2016 Assessment Reports

# **BSBA Program**

# BSBA AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **BSBA Learning Outcome 3: Communication**

Effectively communicate orally and in writing using various mediums across unique situations.

### **Assessment Method:**

Group projects in BUS 308

### **Targeted performance, based on rubrics:**

80% of the students should meet or exceed expectations on the rubric's criterion assessing this learning outcome.

### **Evaluation Process:**

During the spring semester of 2016, 72 students from two sections of the core business course Systems in Organizations were put into multiple teams of three or four students and participated in three case studies and four simulations (the teams were assigned sequentially, not concurrently). Early in the semester, the students' knowledge and understanding was scaffolded with three case studies focused on three foundational course concepts: forecasting, inventory planning, and process analysis. The students were required to submit a case analysis for two of the three case studies (forecasting and inventory planning) and a write-up on each simulation after each of the four simulations was completed.

The write-ups were group projects, however, each student had the opportunity to improve their grade by submitting rewrites for each case analysis and simulation write-up.

Written communication was assessed using a writing rubric (see below). The rubric was used for both the case analyses as well as the four simulation write-ups.

For BSBA Learning Outcome #3, the student learning outcome for written communication was first found by averaging the score of the group write-ups from the first three simulation write-ups (the fourth write-up was excluded as there was a time crunch at the end of the semester and the write-up was not representative of students' work.) The average was formed from a student's work that spanned two different teams. By averaging a student's scores from two teams, an attempt was made to tease out individual learning outcomes. For example, if the top score of a student's written work exceeded expectations in one group, it might have been because a teammate had excellent writing skills. The student's written work in another team was looked at to try to tease out individual performance. If a student's average written assessment score is below expectations, even though it may have met or exceeded expectations on one assignment, it is deemed that the student has writing skills below expectations.

All of the students had the opportunity to turn in individual rewrites for each of the cases and simulation write-ups to improve their grades. If a student took advantage of this opportunity for the third simulation write-up, how the student’s written performance may have improved was also analyzed.

**Rubric:**

<p>9.1.1 - Written Communications <small>view longer description threshold: 8.0 pts</small></p>	<p>Exceeds Expectations: The purpose of the writing is clear and carries through the entire study. The study is cohesive, accurate, and persuasive, flowing logically from point to point and section to section. The reader is well prepared for each sentence in this thoroughly professional report that would not be significantly improved. 10.0 pts</p>	<p>Meets Expectations: The purpose of the writing is clear and carries through the entire study, which is cohesive and accurate. There are appropriate sections; however, there are instances in which the flow is interrupted between points or headings. The student could readily fix these problems with additional time and advice. 8.0 pts</p>	<p>Below Expectations: The purpose is stated, but the language is not clear or the study is organized in sections that are appropriate but they are mingled and mildly disjointed or the writing is hurried and partially inaccurate in one or two places. Problems can be remedied easily by an editor. 6.0 pts</p>	<p>Does Not Meet Expectations: The purpose is not stated or it does not drive the writing of the study. The report is disjointed and contains three and/or more inaccuracies. 4.0 pts</p>	<p>10.0 pts</p>
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**Courses where learning outcome was assessed:**

BUS 308 Systems in Organizations

**Evaluator(s):**

Stephen Morris



## ***Phase 2: Results Assessment and Planned Action***

### **Results:**

The following results were found by using the average written communication scores on three group written assignments:

- 12.5% of the students (9/72) met or exceeded expectations on written communications.
- 87.5% of the students (63/72) were below expectations on written communications.

When the learning outcome from individual rewrites from simulation 3 is included in the results, the numbers change to the following (the improvement in student learning outcomes is a very good indicator of the efficacy of rewrites.) Fewer than half of the students actually turned in rewrites for the third simulation (30/72) as they were optional in the course. Several of the students had already met or exceeded expectations in their written work and were not included in the additional numbers, however, eight of 27 students (29.6%) who had been below expectations showed significant improvement in their written communication learning outcomes in their simulation #3 individual rewrite. When those eight students are included in the results, we have the following:

- 23.6% of the students (17/72) met or exceeded expectations on written communications.
- 76.4% of the students (55/72) were below expectations on written communications.

## **What did we learn about student learning?**

The writing skills of business students needs to improve. Within BUS 308, course improvements would include requiring the students to rewrite the case analyses and simulation write-ups. There is ample evidence in educational research that demonstrates rewriting is perhaps the most salient aspect of developing and honing writing skills.

## **Suggested Action:**

In the broader framework of the BSBA program, it is necessary to have rubrics that assess the writing skills of the students as they wend their way through the entire program. Cases may already be assigned in many courses, but faculty need to understand the importance of assessing writing skills in every core course on many of the assignments, as well as be trained on how to do so. These skills not only align with AACSB standards 9.1.1 – Written Communications, but also with the WSCUC core competency of Written Communication.

## **Closing the Loop:**

This outcome is scheduled to be re-assessed in AY 17/18.

### Addendum: Rubrics used for this evaluation

	Capstone 4	Milestones		Benchmark 1
		3	2	
<b>Organization</b>	Organizational pattern (specific introduction and conclusion, sequenced material within the body, and transitions) is clearly and consistently observable and is skillful and makes the content of the presentation	Organizational pattern (specific introduction and conclusion, sequenced material within the body, and transitions) is clearly and consistently observable within the presentation.	Organizational pattern (specific introduction and conclusion, sequenced material within the body, and transitions) is intermittently observable within the presentation.	Organizational pattern (specific introduction and conclusion, sequenced material within the body, and transitions) is not observable within the presentation.
<b>Language</b>	L language choices are imaginative, memorable, and compelling, and enhance the effectiveness of the presentation. Language in presentation is appropriate to	Language choices are thoughtful and generally support the effectiveness of the presentation. Language in presentation is appropriate to audience.	L language choices are mundane and commonplace and partially support the effectiveness of the presentation. Language in presentation is appropriate to	L language choices are unclear and minimally support the effectiveness of the presentation. Language in presentation is not appropriate to audience.
<b>Delivery</b>	Delivery techniques (posture, gesture, eye contact, and vocal expressiveness) make the presentation compelling, and speaker appears polished and confident.	Delivery techniques (posture, gesture, eye contact, and vocal expressiveness) make the presentation interesting, and speaker appears comfortable.	Delivery techniques (posture, gesture, eye contact, and vocal expressiveness) make the presentation understandable, and speaker appears tentative.	Delivery techniques (posture, gesture, eye contact, and vocal expressiveness) detract from the understandability of the presentation, and speaker appears
<b>Supporting Material</b>	A variety of types of supporting materials (explanations, examples, illustrations, statistics, analogies, quotations from relevant authorities) make appropriate reference to information or analysis that significantly supports the presentation or establishes the presenter's	Supporting materials (explanations, examples, illustrations, statistics, analogies, quotations from relevant authorities) make appropriate reference to information or analysis that generally supports the presentation or establishes the presenter's credibility/ authority on the topic.	Supporting materials (explanations, examples, illustrations, statistics, analogies, quotations from relevant authorities) make appropriate reference to information or analysis that partially supports the presentation or establishes the presenter's credibility/ authority on the topic.	Insufficient supporting materials (explanations, examples, illustrations, statistics, analogies, quotations from relevant authorities) make reference to information or analysis that minimally supports the presentation or establishes the presenter's credibility/ authority on the topic.
<b>Central Message</b>	Central message is compelling (precisely stated, appropriately repeated, memorable, and strongly supported.)	Central message is clear and consistent with the supporting material.	Central message is basically understandable but is not often repeated and is not memorable.	Central message can be deduced, but is not explicitly stated in the presentation.

BUS 406 Content Rubric

### Rubric for the Assessment of Oral Communication: Content

Indicators of Effective Content	Levels of Achievement			
	Beginning	Developing	Competent	Accomplished
<b>Introduction:</b> gains attention, connects to topic, establishes credibility	No attention getting strategy was evident. No clear or relevant connection to topic or speech purpose. No credibility was established.	Use of attention getting strategy, but did not seem to adequately capture audience attention and/ or lead to desired outcome. Credibility was implied.	Effective strategy to capture listeners' attention. Adequate introduction of the topic. Credibility was established by the speaker.	Creative attention getting strategy captures listeners' attention to introduce the topic. It is relevant to the topic and clearly gains the desired response from the audience. Credibility was established by speaker.
<b>Thesis Statement:</b> explicit, identifies topic, previews main points	No thesis statement. Main points are not clearly identified, audience unsure of the direction of the message.	Thesis is implied, although not explicitly stated. Topic is clearly identified, but main points are not clearly previewed.	Thesis statement identifies topic and lists/previews main points.	Speaker clearly stated a well formulated thesis statement during the speech introduction. Thesis statement identifies topic and lists/previews main points.
<b>Connection to Audience:</b> needs & interest, demonstrates understanding	Topic seems irrelevant to audience needs and interests. No attempt made to connect topic to audience.	Topic seems somewhat relevant to audience. Vague reference to audience needs and or interests. Identifies target audience.	Clearly stated the relevance of topic to audience needs and interests. Expresses an understanding of their target audience.	Connection of topic to audience needs and interests is stated with sophistication. Identifies and expresses a deep understanding of their target audience.
<b>Subject Knowledge:</b> depth of content, relevant support, clear explanation	Provides irrelevant or no support. Explanation of concepts is inaccurate or incomplete.	Provides some support for main points, but needed to elaborate further with explanations, examples, descriptions, etc. Support is relevant, but not timely.	Main points adequately substantiated with timely, relevant and sufficient support. Accurate explanation of key concepts.	Depth of content reflects thorough understanding of topic. Main points well supported with timely, relevant and sufficient support. Provided precise explanation of key concepts.
<b>Organization:</b> main points distinct from support, transitions, coherence	Lack of structure. Ideas are not coherent. No transitions. Difficult to identify introduction, body, and conclusion.	General structure/organization seems adequate. Difference between main points and supporting details is blurred. Logical flow, but no clear signposts for transitions.	Clear organizational pattern. Main points are distinct from supporting details. Smooth transitions differentiate key points.	Effective organization well suited to purpose. Main points are clearly distinct from supporting details. Graceful transitions create coherent progress toward conclusion.

BUS 406 Delivery Rubric

## Rubric for the Assessment of Oral Communication: Delivery

Indicators of Effective Delivery	Levels of Achievement			
	Beginning	Developing	Competent	Accomplished
<b>Eye Contact:</b> establish rapport; expand zone of interaction	Reads speech from notes/manuscript. Avoids eye contact with audience.	Conspicuous use of speaker notes. Only occasional, sporadic glances at audience.	Eye contact establishes rapport with audience. Unobtrusive use of speaker notes. Scanning of audience to establish a zone of interaction.	Consistently uses eye contact to maintain rapport with audience. Inconspicuous use of speaker notes. Effective use of scanning to expand zone of interaction.
<b>Movement:</b> expressive, comfortable, enhances message	Body language is not supportive of the message, may contradict it. Gestures, facial expressions, and posture are stiff or distracting.	Body language is a minimal support of the verbal message. Gestures, facial expressions, and posture reflect speaker discomfort that occasionally interferes with the message.	Body language is an adequate support of the message. Movement and gestures clarify key points. Facial expressions and posture seem comfortable.	Gestures, facial expressions, and posture reinforce and enhance the verbal message. Body language is expressive, dynamic, natural and comfortable.
<b>Voice:</b> rate, pitch, volume and tone are natural and authentic	Fails to maintain audience interest and support the verbal message due to excessive monotone, inappropriate rate and volume. Pitch may be strained or flat.	Inconsistent use of voice to support message. Monotone passages interfere with audience interest. Rate may be too fast or slow; volume too high or low. Pitch is strained at times, too artificial or too nervous.	Tone fits verbal message, changing for emphasis at appropriate moments. Rate and volume allow audience to follow message. Pitch seems natural to speaker.	Tone is authentic and appropriate to topic. Rate, pitch and volume vary at key points to support the verbal message and keep audience interest. Voice is natural to the speaker and topic, talking with rather than at audience.
<b>Fluency:</b> pronunciation, enunciation, articulation are smooth; lack of fillers	Incoherent presentation due to many factors that undermine fluency including poor pronunciation. Long pauses interrupt flow of speech. Excessive use of vocalized fillers distracts audience.	Pronunciation is mostly correct yet enunciation and articulation are still tentative. Speaker recovers from awkward pauses and proceeds. Vocalized fillers are noticeable but not excessive.	Careful pronunciation supports coherence of presentation. Enunciation and articulation of words are mostly clear. Pauses were momentary and did not interrupt fluency of speech. Vocalized fillers are minimal and do not distract the audience.	Coherence of presentation strongly supported by correct pronunciation, confident enunciation and articulation. Pauses are purposeful and enhance fluency of speech. Virtually no vocalized fillers are noticeable.

This rubric is intended for use in the assessment of student achievement at the institutional level. It can also be used as a guide for development of rubrics to measure writing at the program, course and section levels. Please send your comments and suggestions about this rubric to Kurt Ewen, LET Co-chair [kewen@valenciac.edu](mailto:kewen@valenciac.edu). For more information <http://valenciac.edu/learningevidence/>

# BSBA AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **BSBA Learning Outcome 3: Communication**

Effectively communicate orally and in writing using various mediums across unique situations.

### **Assessment Method:**

Final Project Presentation in the BSBA Capstone Courses BUS 401 and BUS 406

### **Targeted performance, based on rubrics:**

80% meet expectations

### **Evaluation Process:**

Final presentations were scored by a team of evaluators using a 4 point rubric. The rubrics used BUS 401 and 406 were different. Samples are attached to this report. In BUS 401 the rubric is broken out in to 4 categories; Organization, Language, Delivery, and Central Message. Note that the attached rubric also contains a Supporting Material category that was not evaluated. In BUS 406 the rubric is broken out in to two sections; Content (Introduction, Thesis, Connection, Subject, and Organization) and Delivery (Eye Contact, Movement, Voice, and Fluency).

### **Rubrics:**

3 rubrics were applied to this evaluation. See addendum (p6-8) for details.

### **Courses where learning outcome was assessed:**

BSBA Capstone Courses BUS 401 s1-4 and BUS 406 s2

### **Evaluator(s):**

In BUS 406 eight external judges, mostly VCs, evaluated the content and viability components of the BUS406 students' work as a whole. In BUS 401 3-4 external evaluators (including SOM professor Stephen Morris) judged the content and viability components of the BUS401 students' work.

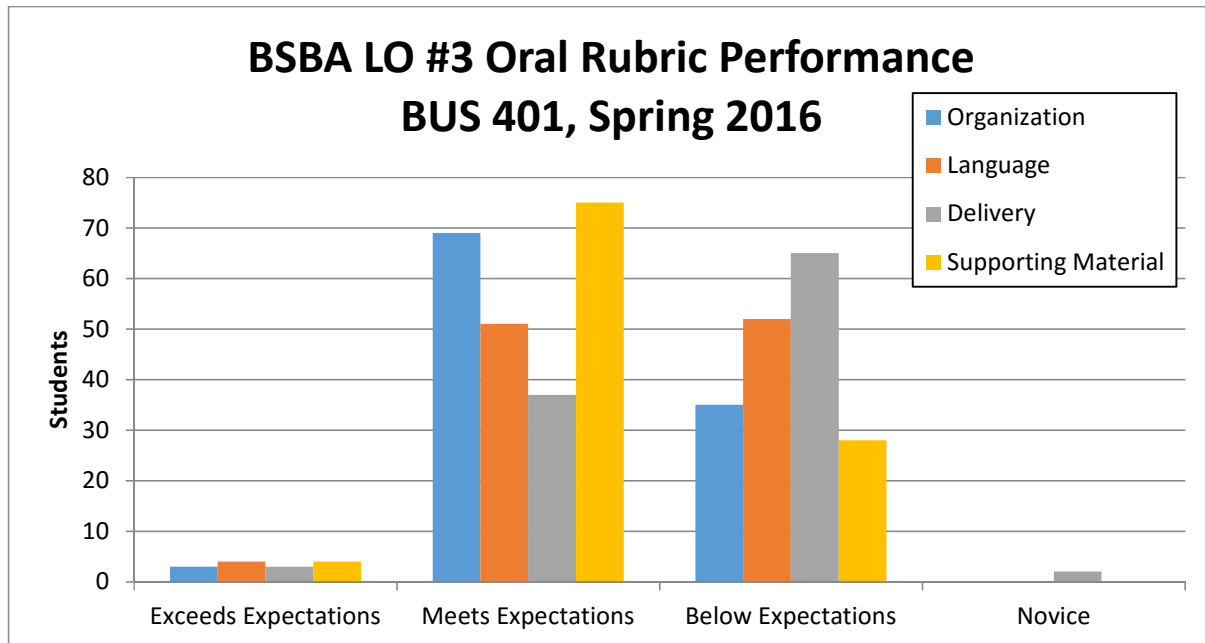
**Phase 2: Results Assessment and Planned Action**

**Results:**

**BUS 401 Oral Rubric Results**

Number of students achieving target

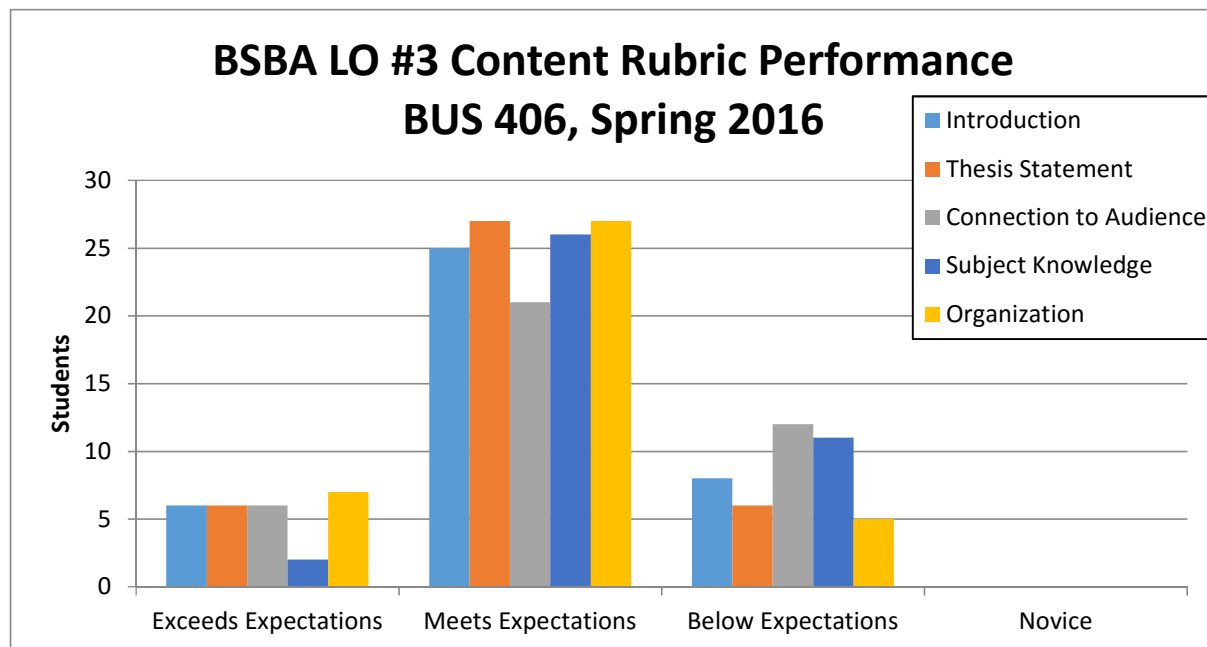
Categories:	Exceeds Expectations = 4	Meets Expectations 3 - 4	Below Expectations 2 - 3	Novice < 2	% Students Meeting or Exceeding Expectations
Organization	3	69	35	0	67%
Language	4	51	52	0	51%
Delivery	3	37	65	2	37%
Supporting Material	4	75	28	0	74%



## BUS 406 Content Rubric Results

Number of students achieving target

Categories:	Exceeds Expectations = 4	Meets Expectations 3 - 4	Below Expectations 2 - 3	Novice < 2	% Students Meeting or Exceeding Expectations
Introduction	6	25	8	0	79%
Thesis Statement	6	27	6	0	85%
Connection to Audience	6	21	12	0	69%
Subject Knowledge	2	26	11	0	72%
Organization	7	27	5	0	87%

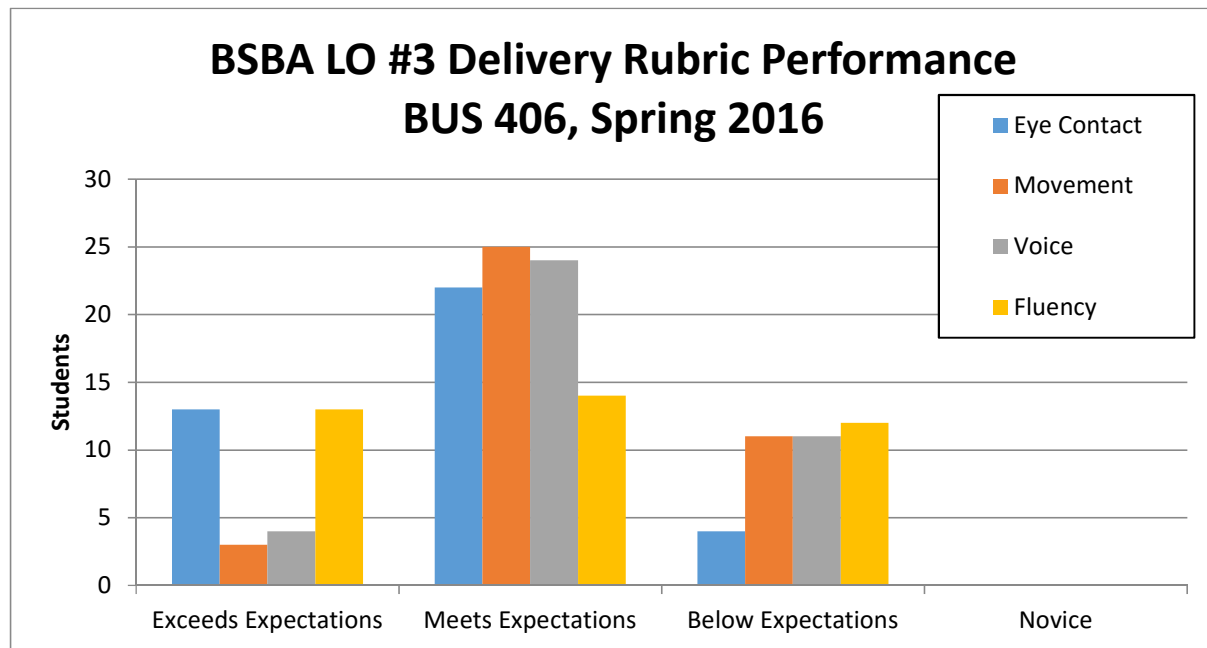




## BUS 406 Delivery Rubric Results

Number of students achieving target

Categories:	Exceeds Expectations = 4	Meets Expectations 3 - 4	Below Expectations 2 - 3	Novice < 2	% Students Meeting or Exceeding Expectations
Eye Contact	13	22	4	0	90%
Movement	3	25	11	0	72%
Voice	4	24	11	0	72%
Fluency	13	14	12	0	69%



## What did we learn about student learning?

- If we use 80% as the target, students are not meeting expectations on the oral communication portion of the outcome.
- It appears that delivery was the weakest point evaluated, especially in BUS 401.

## What did we learn about the process?

- The same rubric is needed across all sections and all courses
- Same evaluators should be used in both 401 and 406
- Calibrate among raters

## Suggested Action:

What will be done differently as a result of what was learned? Discuss how courses and/or curricula will be changed to improve student learning as a result of the evaluation. Include a discussion of how the faculty will help students overcome their weaknesses and improve their strengths. Also include changes to program goals and objectives, if any.

- We need to teach to this outcome more consistently across the program.
- Distribute a standard rubric to all faculty and ask them to teach to the rubric, as appropriate, in their course.

## Closing the Loop:

This outcome is scheduled to be re-assessed in AY 17/18.

## Addendum: Rubrics used for this evaluation

### BUS 401 Oral Rubric

	Capstone 4	Milestones		Benchmark 1
		3	2	
<b>Organization</b>	Organizational pattern (specific introduction and conclusion, sequenced material within the body, and transitions) is clearly and consistently observable and is skillful and makes the content of the presentation cohesive.	Organizational pattern (specific introduction and conclusion, sequenced material within the body, and transitions) is clearly and consistently observable within the presentation.	Organizational pattern (specific introduction and conclusion, sequenced material within the body, and transitions) is intermittently observable within the presentation.	Organizational pattern (specific introduction and conclusion, sequenced material within the body, and transitions) is not observable within the presentation.
<b>Language</b>	Language choices are imaginative, memorable and compelling and enhance the effectiveness of the presentation. Language in presentation is appropriate to audience.	Language choices are thoughtful and generally support the effectiveness of the presentation. Language in presentation is appropriate to audience.	Language choices are mundane and commonplace and partially support the effectiveness of the presentation. Language in presentation is appropriate to audience.	Language choices are unclear and minimally support the effectiveness of the presentation. Language in presentation is not appropriate to audience.
<b>Delivery</b>	Delivery techniques (posture, gesture, eye contact, and vocal expressiveness) make the presentation compelling, and speaker appears polished and confident.	Delivery techniques (posture, gesture, eye contact, and vocal expressiveness) make the presentation interesting, and speaker appears comfortable.	Delivery techniques (posture, gesture, eye contact, and vocal expressiveness) make the presentation understandable, and speaker appears tentative.	Delivery techniques (posture, gesture, eye contact, and vocal expressiveness) detract from the understandability of the presentation, and speaker appears uncomfortable.
<b>Supporting Material</b>	A variety of types of supporting materials (explanations, examples, illustrations, statistics, analogies, quotations from relevant authorities) make appropriate reference to information or analysis which significantly supports the presentation or establishes the presenter's credibility/authority on the topic.	Supporting materials (explanations, examples, illustrations, statistics, analogies, quotations from relevant authorities) make appropriate reference to information or analysis which generally supports the presentation or establishes the presenter's credibility/authority on the topic.	Supporting materials (explanations, examples, illustrations, statistics, analogies, quotations from relevant authorities) make appropriate reference to information or analysis which partially supports the presentation or establishes the presenter's credibility/authority on the topic.	Insufficient supporting materials (explanations, examples, illustrations, statistics, analogies, quotations from relevant authorities) make reference to information or analysis which minimally supports the presentation or establishes the presenter's credibility/authority on the topic.
<b>Central Message</b>	Central message is compelling (precisely stated, appropriately repeated, memorable, and strongly supported.)	Central message is clear and consistent with the supporting material.	Central message is basically understandable but is not often repeated and is not memorable.	Central message can be deduced, but is not explicitly stated in the presentation.

BUS 406 Content Rubric

### Rubric for the Assessment of Oral Communication: Content

Indicators of Effective Content	Levels of Achievement			
	Beginning	Developing	Competent	Accomplished
<b>Introduction:</b> gains attention, connects to topic, establishes credibility	No attention getting strategy was evident. No clear or relevant connection to topic or speech purpose. No credibility was established.	Use of attention getting strategy, but did not seem to adequately capture audience attention and/ or lead to desired outcome. Credibility was implied.	Effective strategy to capture listeners' attention. Adequate introduction of the topic. Credibility was established by the speaker.	Creative attention getting strategy captures listeners' attention to introduce the topic. It is relevant to the topic and clearly gains the desired response from the audience. Credibility was established by speaker.
<b>Thesis Statement:</b> explicit, identifies topic, previews main points	No thesis statement. Main points are not clearly identified, audience unsure of the direction of the message.	Thesis is implied, although not explicitly stated. Topic is clearly identified, but main points are not clearly previewed.	Thesis statement identifies topic and lists/previews main points.	Speaker clearly stated a well formulated thesis statement during the speech introduction. Thesis statement identifies topic and lists/previews main points.
<b>Connection to Audience:</b> needs & interest, demonstrates understanding	Topic seems irrelevant to audience needs and interests. No attempt made to connect topic to audience.	Topic seems somewhat relevant to audience. Vague reference to audience needs and or interests. Identifies target audience.	Clearly stated the relevance of topic to audience needs and interests. Expresses an understanding of their target audience.	Connection of topic to audience needs and interests is stated with sophistication. Identifies and expresses a deep understanding of their target audience.
<b>Subject Knowledge:</b> depth of content, relevant support, clear explanation	Provides irrelevant or no support. Explanation of concepts is inaccurate or incomplete.	Provides some support for main points, but needed to elaborate further with explanations, examples, descriptions, etc. Support is relevant, but not timely.	Main points adequately substantiated with timely, relevant and sufficient support. Accurate explanation of key concepts.	Depth of content reflects thorough understanding of topic. Main points well supported with timely, relevant and sufficient support. Provided precise explanation of key concepts.
<b>Organization:</b> main points distinct from support, transitions, coherence	Lack of structure. Ideas are not coherent. No transitions. Difficult to identify introduction, body, and conclusion.	General structure/organization seems adequate. Difference between main points and supporting details is blurred. Logical flow, but no clear signposts for transitions.	Clear organizational pattern. Main points are distinct from supporting details. Smooth transitions differentiate key points.	Effective organization well suited to purpose. Main points are clearly distinct from supporting details. Graceful transitions create coherent progress toward conclusion.

BUS 406 Delivery Rubric

## Rubric for the Assessment of Oral Communication: Delivery

Indicators of Effective Delivery	Levels of Achievement			
	Beginning	Developing	Competent	Accomplished
<b>Eye Contact:</b> establish rapport; expand zone of interaction	Reads speech from notes/manuscript. Avoids eye contact with audience.	Conspicuous use of speaker notes. Only occasional, sporadic glances at audience.	Eye contact establishes rapport with audience. Unobtrusive use of speaker notes. Scanning of audience to establish a zone of interaction.	Consistently uses eye contact to maintain rapport with audience. Inconspicuous use of speaker notes. Effective use of scanning to expand zone of interaction.
<b>Movement:</b> expressive, comfortable, enhances message	Body language is not supportive of the message, may contradict it. Gestures, facial expressions, and posture are stiff or distracting.	Body language is a minimal support of the verbal message. Gestures, facial expressions, and posture reflect speaker discomfort that occasionally interferes with the message.	Body language is an adequate support of the message. Movement and gestures clarify key points. Facial expressions and posture seem comfortable.	Gestures, facial expressions, and posture reinforce and enhance the verbal message. Body language is expressive, dynamic, natural and comfortable.
<b>Voice:</b> rate, pitch, volume and tone are natural and authentic	Fails to maintain audience interest and support the verbal message due to excessive monotone, inappropriate rate and volume. Pitch may be strained or flat.	Inconsistent use of voice to support message. Monotone passages interfere with audience interest. Rate may be too fast or slow; volume too high or low. Pitch is strained at times, too artificial or too nervous.	Tone fits verbal message, changing for emphasis at appropriate moments. Rate and volume allow audience to follow message. Pitch seems natural to speaker.	Tone is authentic and appropriate to topic. Rate, pitch and volume vary at key points to support the verbal message and keep audience interest. Voice is natural to the speaker and topic, talking with rather than at audience.
<b>Fluency:</b> pronunciation, enunciation, articulation are smooth; lack of fillers	Incoherent presentation due to many factors that undermine fluency including poor pronunciation. Long pauses interrupt flow of speech. Excessive use of vocalized fillers distracts audience.	Pronunciation is mostly correct yet enunciation and articulation are still tentative. Speaker recovers from awkward pauses and proceeds. Vocalized fillers are noticeable but not excessive.	Careful pronunciation supports coherence of presentation. Enunciation and articulation of words are mostly clear. Pauses were momentary and did not interrupt fluency of speech. Vocalized fillers are minimal and do not distract the audience.	Coherence of presentation strongly supported by correct pronunciation, confident enunciation and articulation. Pauses are purposeful and enhance fluency of speech. Virtually no vocalized fillers are noticeable.

This rubric is intended for use in the assessment of student achievement at the institutional level. It can also be used as a guide for development of rubrics to measure writing at the program, course and section levels. Please send your comments and suggestions about this rubric to Kurt Ewen, LET Co-chair [kewen@valenciac.edu](mailto:kewen@valenciac.edu). For more information <http://valenciac.edu/learningevidence/>

# BSBA AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### Learning Outcome assessed:

#### **BSBA Learning Outcome 4: Quantitative and Qualitative Information**

Create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.

### Assessment Method:

Selected Exam Questions in BUS 308

### Targeted performance, based on rubrics:

80% of the students should meet or exceed expectations on the rubric's two criteria assessing this learning outcome.

### Evaluation Process:

A final exam (worth 10% of the student's grade) was given to students during "finals week." Two questions on the exam were used to assess BSBA Learning Outcome #4 – Quantitative and Qualitative Information: Create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.

The first question assessed was based on two simulations that the students had participated in during the semester. Demand data was changed from the simulations and the students had to analyze the new data within the parameters of the simulation and make recommendations on whether or not to build factories and/or warehouses.

To answer the second question, students read a short case study and then developed an analysis that required them to sift through the case and find relevant information, analyze it, and make a recommendation as to whether or not management's decisions in the case were warranted by the data.

In order to understand the relevance of the two questions assessed on the final exam, some background of the course is provided:

During the spring semester of 2016, 72 students from two sections of the core business course Systems in Organizations were put into teams of three or four students and participated in three case studies and four simulations. Early in the semester, the students' knowledge and understanding was scaffolded with three case studies focused on three foundational course concepts: forecasting, inventory planning, and process analysis.

The simulations in the course were designed to be experiential learning activities that incorporated the course's three foundational concepts. After being on one team for the first three case studies, students were placed into new teams for the first two simulations. (The first two simulations were based on a factory model – "Littlefield Technologies" by Responsive Learning Technologies of San

Jose, CA). Pedagogical learning activities included guided instruction – prior to playing the first simulation the students were asked to complete 16 questions that helped in understanding the game and laying out a strategy. Teams were tasked with creating an optimal strategy, one that would ‘beat’ the other teams in the class. Students were highly motivated to ‘win’ (end up with the most money) as the top teams earned more points towards their grades; pride and ego were involved; and business students are, by and large, highly competitive and want to win.

After the first simulation, which was fairly simplistic and primarily designed to help the students orient themselves to the simulation and lessen cognitive load for the next simulation, the same teams participated in a second simulation. The second simulation was related to the first, but incorporated more parameters that the students needed to consider. Parameters the students needed to understand included demand, utilization rates, queues, lead times, revenue – all of which were needed to perform a process analysis within the simulation. The simulations challenged the students to create proper forecasts and delve into inventory planning, reinforcing the earlier exposure and learning of the foundational concepts. It was important to integrate all of the relevant quantitative information to develop and evaluate their management decisions. Decisions during the first two simulations included when to buy and sell machines, create proper reorder points and economic order quantity levels, plan for inventory so that their factory would not run out of raw material, and change contract pricing based on lowering lead times to increase revenue.

After completing the first two simulations and turning in a report on each one (the written reports were used for assessment purposes), the students were put into new teams for the third and fourth simulations. The second set of simulations were superficially very different from the first two – instead of a factory floor, the students needed to optimize a supply chain involving factories and warehouses. (The second set of simulations were part of “The Supply Chain Game,” also by Responsive Learning Technologies in San Jose, CA.) But students still needed to incorporate the course’s foundational concepts: forecasting, inventory planning, and process analysis which were used to help understand supply chains.

Again, the first of the two Supply Chain Game simulations was designed to introduce the students to a new simulation and to lower the cognitive load on the final simulation of the course. Guided instruction was again used: the students were asked to answer 36 questions prior to playing the first Supply Chain simulation, and 40 questions prior to playing the final simulation. The questions were to help students understand not only the game, but to provide a roadmap to an optimal strategy. Essentially, the students needed to understand which data were relevant information and which were not, in essence, ‘connecting the dots’ that the questions provided. Again, the simulations challenged the students to create proper forecasts and delve into inventory planning, reinforcing the earlier exposure and learning of the foundational concepts. It was important to integrate all of the relevant quantitative information to develop and evaluate their management decisions. Decisions included items such as where to build factories and warehouses and how much capacity to install in each factory. As for all of the simulations, the students were highly motivated to ‘win,’ that is, teams wanted to end the simulation with the most money, as grades, pride, and ego were involved. At the conclusion of each simulation, the teams submitted a write-up.

The final exam, on which this assessment was based, continued the process of analyzing and integrating relevant quantitative and qualitative information to develop and evaluate management decisions.

**Rubrics:**

	Accomplished	Meets Expectations	Below Expectations	Novice
<b>Use Information Effectively to Accomplish a Specific Purpose</b>	Communicates, organizes and synthesizes information from sources to fully achieve a specific purpose, with clarity and depth	Communicates, organizes and synthesizes information from sources. Intended purpose is achieved.	Communicates and organizes information from sources. The information is not yet synthesized, so the intended purpose is not fully achieved.	Communicates information from sources. The information is fragmented and/or used inappropriately (misquoted, taken out of context, or incorrectly paraphrased, etc.), so the intended purpose is not achieved.
<b>Propose Solutions/ Hypotheses</b>	Proposes one or more solutions/ hypotheses that indicates a deep comprehension of the problem. Solution/ hypotheses are sensitive to contextual factors.	Proposes one or more solutions/ hypotheses that indicates comprehension of the problem. Solutions/ hypotheses are sensitive to contextual factors	Proposes one solution/ hypothesis that is “off the shelf ” rather than individually designed to address the specific contextual factors of the problem.	Proposes a solution/ hypothesis that is difficult to evaluate because it is vague or only indirectly addresses the problem statement.
<b>Evaluate Potential Solutions</b>	Evaluation of solutions is deep and elegant (for example, contains thorough and insightful explanation) and includes, deeply and thoroughly, all of the following: reviews logic/ reasoning, examines feasibility of solution, and weighs impacts of solution.	Evaluation of solutions is adequate (for example, contains thorough explanation) and includes the following: reviews logic/ reasoning, examines feasibility of solution, and weighs impacts of solution.	Evaluation of solutions is brief (for example, explanation lacks depth) and includes the following: reviews logic/ reasoning, examines feasibility of solution, and weighs impacts of solution.	Evaluation of solutions is superficial (for example, contains cursory, surface level explanation) and includes the following: reviews logic/ reasoning, examines feasibility of solution, and weighs impacts of solution.



<p>■ 9.1.3 - Analyze &amp; Frame Problems <small>view longer description threshold: 9.0 pts</small></p>	<p>Exceeds Expectations: The analysis of information gaps was perceptive, and the team engaged in active information gathering, delving deeply into the materials provided. A comprehensive review of relevancy resulted, incorporating a wide variety of sources, leading to a professional quality analysis that draws clearly on personal and professional experience. 10.0 pts</p>	<p>Meets Expectations: Relevant information gaps were identified. The team successfully engaged in information gathering based on that review and found additional materials that were relevant to filling the identified gaps. At least two different types of sources were used. The analysis was on target. It is evident that the team has limited professional experience upon which to draw. 8.0 pts</p>	<p>Below Expectations: At least one gap in information was identified. The team found additional information to fill the gap, but it was limited in its scope. The search strategies used were inadequate to yield a thorough coverage of what was needed. The team may not have looked beyond one type of information. The analysis was shallow but still correct, ready for expansion and refinement. 6.0 pts</p>	<p>Does Not Meet Expectations: Information was taken at face value, without benefit of active questioning. As a result, gaps in the information were not identified or were incorrect. No apparent systematic search strategy was used. The resulting analysis was off base in one or more significant ways. 4.0 pts</p>	<p>10.0 pts</p>
<p>■ 9.1.8 - Application of knowledge <small>view longer description threshold: 16.0 pts</small></p>	<p>Exceeds Expectations: The student has translated the results of the data analysis into an appropriate set of recommendations, conclusions, or solutions for the company that will enhance its operation. 20.0 pts</p>	<p>Meets Expectations: The student has translated the results of the data analysis into a recommendation or solution that should prove helpful for the company's operation. 16.0 pts</p>	<p>Below Expectations: The student has translated the results of the data analysis into a recommendation or solution, but it is not likely to resolve or may heighten the problem. 14.0 pts</p>	<p>Does Not Meet Expectations: The student's decision does not make sense and could harm the company. 6.0 pts</p>	<p>20.0 pts</p>

**Courses where learning outcome was assessed:**

BUS 308 Systems in Organizations

**Evaluator(s):**

Stephen Morris

**Phase 2: Results Assessment and Planned Action**

**Results:**

- 34.7% of the students (25/72) met or exceeded expectations by correctly analyzing and integrating information properly on both questions.
- 47.2% of the students (34/72) met or exceeded expectations on one of the questions, but not both.
- 18.1% of the students (13/72) failed to properly analyze either question.

Student Performance	Question 1 Correct	Question 2 Correct	Exceeds Expectations Both Questions Correct	Meets Expectations One Question Correct	Unprepared Neither Question Correct	% Students Meeting or Exceeding Expectations
Students	34	51	25	34	13	82%
% of Class	47%	71%	35%	47%	18%	

**What did we learn about student learning?**

The critical thinking and analytical skills of our business students need to improve. Within BUS 308, course improvements would include requiring the students to rewrite the case analyses and simulation write-ups. There is ample evidence in educational research that indicates rewriting is perhaps the most salient aspect of developing and honing critical thinking and analytical skills.

**Suggested Action:**

In the broader framework of the BSBA program, it is necessary to have rubrics that assess the critical thinking and analytical skills of the students as they wend their way through the entire program. Cases may already be assigned in many courses, but faculty need to understand the importance of assessing critical thinking and analytical skills for assignments, as well as be trained on how to do so. These skills not only align with AACSB standards 9.1.3 – Analyze and Frame Problems and 9.1.8 – Application of Knowledge, but also with the WSCUC core competency of Critical Thinking.

**Closing the Loop:**

## Addendum: Exam used in this evaluation

For the following question, **assume the same parameters as in the supply chain game EXCEPT AS NOTED IN THE QUESTION.**

Assume batch size (order quantity) of **200 drums**

Assume shipping by truck

Revenue: \$1,450/drum  
 Material Cost: \$1,000/drum  
 Misc. costs (batch & holding) \$10/drum

**Assume 10% interest rate per year on all cash held.**

Truck – Factory and warehouse in same region (7 days to ship): \$15,000  
 Truck – Factory and warehouse in different regions (7 days to ship)  
 (both on continent): \$20,000  
 Truck – Factory on continent and warehouse on Fardo (14 days to ship): \$45,000  
 (assume trucks can hold 200 drums)

Mail to customer:  
 Warehouse and customer in same region: \$150/drum  
 Warehouse and customer in different regions (both on continent): \$200/drum  
 Warehouse on continent, customer on Fardo: \$400/drum

Factory cost (without capacity): \$500,000 90 days to come online  
 Capacity cost (per unit): \$50,000 90 days to come online  
 Warehouse cost: \$100,000 60 days to come online

1. **FOR THIS PROBLEM ONLY:** Assume *initially* that you have an existing factory and warehouse on Calopeia. Assume the factory on Calopeia has a capacity of 70 drums/day. Assume Calopeia has an average daily demand of 50. Assume for this problem **ONLY** that Calopeia and Fardo are the only two regions of the game.

The demand for Fardo for the first 90 days of demand is 900 units (from days 641-730). The average demand is expected to remain constant, with no upward or downward trend. It is now day 730 and you have until day 1430 in which to sell to customers. **What should you do to maximize profits? Show all calculations on the NEXT page (you can also use the back).**

**Show all work. For question 1 (after doing the calculations) circle the BEST answer of the five options (that is, which is MOST profitable).**

You are to determine what strategy to implement on Fardo (the island in the supply chain game). There are five options:

- a. ignore selling to any customers on Fardo;
- b. sell to customers on Fardo from the warehouse in Calopeia;
- c. build a warehouse on Fardo, ship from the factory in Calopeia;
- d. build a factory on Fardo
- e. build a factory and warehouse on Fardo

## **SUPPLY CHAIN CHALLENGES AT LEAPFROG**

### **Introduction**

Early in the morning on Monday, August 11, 2003, toy executive Kevin Carlson checked his nationwide weekend sales numbers and got a surprising glimpse of Christmas future. Stores had sold 360 of his company's LittleTouch LeapPads in the product's introductory weekend. Parents hunting for an educational toy for infants and toddlers were reaching for the new gadget, which makes noises when a child touches parts of an illustrated book. That small number had huge implications. Forecasting software told Mr. Carlson that he would need about 700,000 units to meet projected holiday demand—twice as many as he had planned to ship.

So his company, LeapFrog Enterprises Inc., did something unusual. At a time when other toy companies were unloading their final Christmas shipments from cargo ships out of China, LeapFrog began placing what would turn into a huge new order for LeapPads. Its factory, privately held Capable Toys Ltd. of Zhongshan, China, scrambled for extra plastic molds, custom-designed electronics, and scarce baby-drool-proof paper and pumped out LeapPads around the clock.

Frog's frantic race against the holiday deadline shows how technology and global supply chains are transforming a great business challenge. For years, toy makers would place their entire holiday orders in January and February blindly betting on demand for their products. By Christmas, they would have shortages of their hit products and huge stockpiles of their duds. In 1984, parents camped outside stores for Cabbage Patch Dolls, followed by Teenage Mutant Ninja Turtles in 1988 and the Little Mermaid in 1989. In 1993, executives at Bandai Inc. were slow to react to the popularity of Mighty Morphin Power Rangers. Only 600,000 of an estimated demand for 12 million made it to stores by Christmas. In 1996, Tyco Toys Inc. was also caught short on Tickle Me Elmo. The company rolled out about 1 million units of the giggly plush toy, but could have sold almost a million more.

### **Electronic Commerce, Relationship Management, and Forecasting**

The shift that let LeapFrog make its August forecast came just a few years ago with the Internet as major retailers, including Target, Kmart, and Toys "R" Us - which sell two-thirds of LeapFrog's toys - became less guarded about their market data and allowed suppliers real-time access to their sales databases. These days a LittleTouch sale at any US Wal\*Mart appears in LeapFrog's databases overnight. With new data-tracking systems, manufacturers know which stores sold the most products and the buyers demographics, including whether the shopper is more likely to speak English or Spanish.

With this data Mr. Carlson can make various extrapolations, even from sales as small as 360 units. In his small cubicle in LeapFrog's California headquarters, Mr. Carlson crunched the LittleTouch sales numbers through four computer models. They are designed to weed out unusual explanations for sales spikes—everything from discounts and TV advertising to where in stores the product was displayed. In the case of LittleTouch, he couldn't find an anomaly: It was a genuine hit. During the next five weeks, LittleTouch sales took off, surpassing those of LeapFrog's other top sellers during their own introductory periods.

After six weeks on the market, LittleTouch retail sales reached 5,000 units at LeapFrog's four major accounts. Based on that rate, forecast models were predicting sales of more than 700,000 in 2003, double LeapFrog's initial projections.

### **Global Sourcing, Capacity Decisions and Manufacturing Processes**

It took 12 months to produce the first 350,000 LittleTouch toys (the factory had to design the molds, produce the molds, and then once production started, the factory was running only 5 days per week). LeapFrog eventually would want to make the same number again in just four months (assume the factory went to a 7-day per week production schedule). In Zhongshan, an industrial town 60 miles north of Hong Kong. Managers at the Capable Toys factory had expected to wrap up production of LittleTouch for the year in early fall. But soon after the sale projections emerged in August, "every day the LeapFrog marketing people said to us, 'Can we have a few more?' says Capable's chief executive, Kenneth So, 51. As the requests grew larger, Mr. So set up a special task force that met daily to prepare for an all-out LittleTouch emergency.

There was very little Capable could do immediately to increase production. The molds that make the plastic parts of the toy can pump out only about one piece every 40 seconds. The factory needed to find more raw materials and custom-made parts, such as microchips and special paper. The plant needed to hire more workers. Not long ago these issues would have made a last-minute request to increase production hopeless, Mr. So says. But Mr. So's factory isn't like the simple sweatshops that first sprouted up in China in the 1980s. To compete against low-cost, low-end competitors today, he markets his factory as a specialist in design and supply chain efficiencies that can dramatically speed up manufacturing processes

The showpiece of his 14-acre, five-building campus is the mechanical-design studio, where about 50 uniformed technicians and engineers use computer-automated-design software to create and improve toy parts and manufacturing processes. Here engineering supervisor Huang Hengbin, 32, made a breakthrough on the molds for the toy's plastic parts. The LittleTouch's 41 metal molds, also called tools, are a critical part of the production process. The factory runs the tools 24 hours a day, in three 8-hour shifts, to produce enough plastic parts to keep the assembly line running during regular hours. "When we design the product from the ground up, we know the limitations," says Mr. Huang, "So with the LittleTouch, we knew immediately that the limit was the tools," he says. One set could produce a maximum of 1,750 toys per day.

The factory, which had two sets of tools running around the clock, got the OK from LeapFrog for a third set of tools in late August when Mr. Bender, LeapFrog's global retail president, was sure that LittleTouch was a bona fide hit. During the first week in September, LeapFrog approved the making of a fourth set of tools. Work on creating the fourth set was started in mid-October, when the third set was ready to produce toys. Mr. Huang's contribution was not only to produce the extra sets, which take weeks to make and cost hundreds of thousands of dollars-but also to ensure that each new set was more than a mere duplicate. "Every single [toy] part can be improved to save time," he says. He did just that: The original two sets of molds produced 3,500 toys a day; the third set of tools improved output to 6,300 a day (a combined total for all three sets. That is, the third set can produce 2,800 per day, and the fourth set can also produce 2,800 per day.) His design improvements reduced the toys' fail rate to just 0.3 percent today from an initial 5 percent. That means hundreds more finished LittleTouch toys in the same amount of time,

### **Material Sourcing**

LeapFrog and Capable also had to hustle to find the specialized materials and parts they needed. Each toy is equipped with a mini-speaker and three microchips, as well as a specially designed electronic membrane that translates a child's touch into a signal for the toy's brain. The Capable Toys factory initially had trouble finding a supplier for touch-sensitive membranes, but then Mr. So's staff tapped its network of suppliers to hunt down a second vendor. Another material that caused headaches was the cloth-like paper called Tyvek used in the LittleTouch books and made by DuPont Co. Homebuilders use the material as part of the insulation process because it is water-resistant and still breathes. LeapFrog needed something that would be drool-resistant and still absorb ink. The only way to get the material was through a third-party supplier—a book printing firm—in the United States, says Andy Murer, LeapFrog's vice president of operations. That meant hiring the U.S. company to do the printing as well. That decision added 50 cents to 60 cents per book in production costs, but it was worth it to preserve the company's long-term image, Mr. Murer says.

### **Logistics**

The toughest and most costly decision for LeapFrog was to use air freight to respond to shortages. That happened around September 21, when retail sales of the \$35 LittleTouch began to flatten because of scarce inventory. After Mr. Bender started air shipping the toys, sales picked up again. But at \$10 to \$15 per lightweight, but bulky toy, air shipping sliced the company's profit on those LittleTouch shipments to almost nothing. As of late December 2003, retailers were again lean on LittleTouch products. The day after Thanksgiving, about 30 percent of retailers were out of stock. The toy was still being either flown in or put on special fast boats, which take 14 days from Hong Kong to Los Angeles without standard stopovers elsewhere.

### **Clarification of case item:**

The company has determined that they need 700,000 Leap Pads for the holiday season. The company needs to produce 350,000 more units in four months (they had 350,000 in inventory and need an additional 350,000).

### **Suggestion:**

Put together a timeline for the production of Leap Pads.

2) Do you agree or disagree with Leap Frog's decisions to make a 3<sup>rd</sup> and then a 4<sup>th</sup> set of tools? Why or why not? Back up your answer with numerical data from the case. (Use this page for your calculations)

# **BSBA AY 2015-2016 Assessment**

## ***Phase 1: Assessment Plan***

### **Learning Outcome assessed:**

#### **BSBA Learning Outcome 5: Accounting**

Attain financial literacy in the understanding and interpretation of financial statements of organizations.

### **Assessment Method:**

Final Exam

### **Targeted performance, based on rubrics:**

80% meet expectations

### **Evaluation Process:**

Students were given a 10 question short answer/essay question final examination (attached, p4-6). The assessment bins (meets, exceeds, below expectations and novice) are based on the percentage of points the student received out of a possible score of 120.

### **Rubric:**

No rubric provided.

### **Course where learning outcome was assessed:**

BUS 201 s5-6, Principles of Financial Accounting

### **Evaluator(s):**

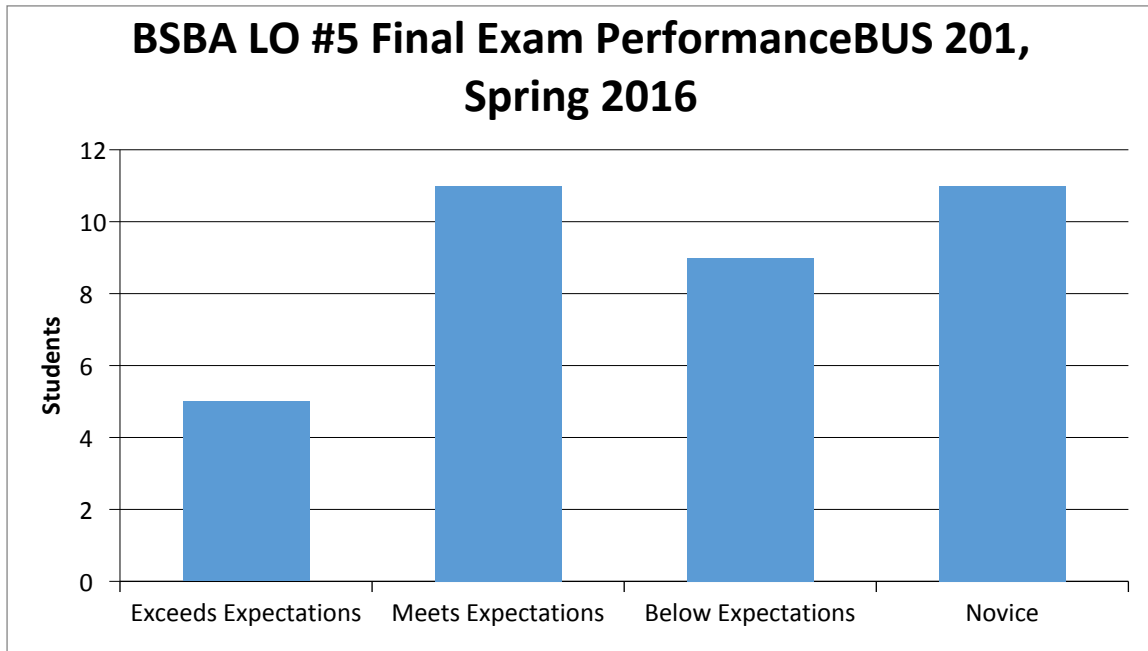
Jennifer Wells

**Phase 2: Results Assessment and Planned Action**

**Results:**

**BUS 201 Final Exam Results**

Number of students achieving target	Exceeds Expectations > 90%	Meets Expectations 80% - 90%	Below Expectations 70% - 80%	Novice < 70%	% Students Meeting or Exceeding Expectations
Final Exam	5	11	9	11	44%





### **Suggested Action:**

- Rewrite Outcome to address “Accounting” and not “Financial” literacy.
- Assess outcome in all sections, not selected sections.
- Assess outcome in 400 level course.
- Create clear rubric for outcome.
- Same questions need to be asked across sections.
- Data are not useful, so outcome will be reassessed in AY 16/17.

### ***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

#### **Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

## Addendum: BUS 201 Final Exam

Final Exam Spring 2016

1. Prepare the 2014 Statement of Cash Flows using the indirect method. There were no noncash investing or financing transactions during 2014. During the year there were no sales of plant assets, no payment of notes payable, no retirement of stock and no treasury stock transactions. (15 points)

Explain your findings from the Statement of Cash Flows. How did the company do? This is not a yes or no question. (5 points)

Explain the following accounts: inventory, prepaid expenses, salary payable and accrued liabilities. What are these accounts? What happened to these accounts? Did they increase or decrease? What does that mean? Is this good or bad for the company? (5 points)

2. At December 31, 2014, Eastern corporation had the following stockholders' equity:

Journalize the following: Issued 10 million shares of common stock for \$12 per share, purchased 8 million shares of treasury stock for \$104 million, sold 3 million shares of treasury stock (purchased before) for \$45 million, declared a \$28 million cash dividend, paid the cash dividend. Prepare the stockholders' equity as of December 31, 2015 (net income was \$451 million) (15 points)

3. Gifford Corporation earned \$25,000 as of December 31, 2015. On December 14, 2015 they declared the annual cash dividend on its 5% preferred stock (10,000 shares with total par value of \$110,000) and a \$0.40 per share on its common stock (30,000 shares with a total par value of \$45,000). Gifford then paid the dividend on January 4, 2016. Journalize declaring the dividend and paying the dividend. Did retained earnings increase or decrease? By how much? (10 points)

4. Apple issued 9% ten year bonds payable with a face amount of \$500,000 when the market interest rate was 9%. Assume the accounting year for Apple ends December 31<sup>st</sup> and that bonds pay interest on January 1<sup>st</sup> and July 1<sup>st</sup>. Journalize the issuance of the bonds payable on July 1, 2015, accrual of interest expense on December 31, 2015 and the payment of interest on January 1, 2016. (5 points)

5. Kendrick Investments issued \$750,000 of 8% 4 year bonds payable on March 31, 2014. The market rate on the day of issuance was 12% and Kendrick bonds pay interest monthly. To get the present value from Excel you would: (5 points)

Rate:

Nper:

Payment:

FV:

6. On June 30, 2014 when the market rate is 7%, Costco issues \$500,000 of 6% 8 year bonds payable. The bonds pay interest on June 30 and December 31. Using Excel the issue price of the bond is \$469,765. Record the issuance of the bond payable on June 30, 2014 and the payment of interest on December 31, 2014. (10 points)

7. A bond with a face amount of \$25,000 has a current price quote of 102.75. What is the bond's price? (5 points)

8. Pottery Barn's Inc.'s inventory records are as follows:

Beginning inventory      10 @ \$150 = \$1500

1/15 purchase              4 @ \$145 = \$580

1/26 purchase              9 @ \$141 = \$1269

Pottery Barn sold 15 units during the month of January.

Compute cost of goods sold and ending inventory for each of the following: (10 points)

- a) Average cost
- b) FIFO
- c) LIFO
- d) Specific unit cost records show that 8 \$150, 3 \$145 and 4 \$141 were sold during January

9. Nordstrom purchased inventory costing \$425,000 and sold 80% of the goods for \$810,000. All purchases and sales were on account. Nordstrom later collected 38% of the accounts receivable. Journalize the transactions. How much inventory would Nordstrom report on the balance sheet at the end of the month? (5 points)

10. Service revenue was \$42,850 of which 8% is cash and the remainder on account. Collections from customers on account were \$37,875. Uncollectible account expense was 2.5% of service revenue on account. Write-offs of uncollectible accounts receivable were \$375. On July 1, received a 5 month, 6%, \$4,870 note receivable from a client in exchange for the customer's past due account. July 31, 2016, monthly bank statement reported \$210 of NSF checks from customers. Journalize each transaction including the accrual of one month of interest on the note. (10 points)

11. Purchased 800 common shares as an investment in trading securities paying \$15/share. Received cash dividend of \$0.72/share on the trading securities. Adjusted the trading securities to fair value of \$18/share. Journalize the purchase, receipt of the dividend and adjustment. (5 points)

12. Prepare the adjusting entries (3 points each unless noted)

Employees' salaries owed for two days of a five day work week. Weekly payroll is \$37,500.

Depreciation on the equipment \$7,800

Interest expense of \$3,700 that it must pay the next month

Prepaid insurance expense beginning \$500. Payments for insurance during the year \$6,000. Prepaid insurance ending \$1200.

Unearned service revenue beginning \$12,900. Unearned service revenue, ending \$4,000.

# BSBA AY 2015-2016 Assessment

## ***Phase 1: Assessment Plan***

### **Learning Outcome assessed:**

#### **BSBA Learning Outcome 9: Marketing**

Produce specific marketing tools needed for product development, consumer communications, pricing and distribution channels.

### **Assessment Method:**

Course embedded test questions.

### **Targeted performance, based on rubrics:**

80% meet expectations

### **Evaluation Process:**

Because both Professor Millar and Professor Fu teach the Marketing Principles class (BUS302) that is required of all School of Management (SOM) students, they were assigned to assess the aforementioned learning outcome in the Marketing Principles (BUS 302) class in the Spring of 2016. In this particular class, the students should have “emerging” knowledge for the outcome.

- A benchmark of 70% was set for a performance standard on each of the questions related to the learning outcome.
- Used multiple choice test questions related to product development and pricing. The same questions were used for all sections.
- In total, 105 students answered six multiple-choice questions – three related to product development, and three related to pricing.
- A simple frequency analysis of the number correct for each question was performed. Basic descriptive statistics were run on the scores for each of the questions representing the learning outcomes.

### **Rubric:**

No rubric provided

### **Course where learning outcome was assessed:**

BSBA BUS 302, Marketing Principles, Sections 1, 3, 8, & 9

### **Evaluator(s):** Michelle Millar and Schenzhao Fu

**Phase 2: Results Assessment and Planned Action**

**Results:**

**BUS 302 Exam Results**

<b>Product Development - Fail</b>	% of Students Answering Correctly
In which stage of the product life cycle will promotional expenditures be significantly high in an attempt to create consumer awareness of a product and its features?	83%
In a sequential new product development process, concept testing is most likely to be followed by _____.	63%
In the _____ stage of new product development, products undergo rigorous tests to make sure that they perform safely and effectively, or that consumers will find value in them.	46%

<b>Pricing - Pass</b>	% of Students Answering Correctly
Which of the following sets the upper limit for a product's pricing?	73%
_____ pricing involves charging a constant low price with few or no temporary price discounts.	82%
_____ pricing involves setting prices based on the expenses involved in producing, distributing, and selling a product plus a fair rate of return for a company's effort and risk.	94%

## What did we learn?

- Students had strong knowledge about pricing, but not for all of the product development concepts.
- Unfortunately, the findings only pertain to part of the learning outcome. The learning outcome as it is currently written incorporates several learning outcomes, making it difficult to say for certain what students did and did not learn that is related to it, thus making it impossible to determine whether students “passed” or “failed” it.
- We have also learned that the outcome, as it is currently written, is too ambitious for a single Marketing course (Marketing Principles) in the BSBA Program.
- The learning outcome needs to be rewritten to be both more applicable to the Marketing Principles class (e.g., to “apply” known tools rather than to “produce” new tools), and to be more easily measured with just one “action-oriented” outcome instead of several.

## Suggested Action:

Discuss how courses and/or curricula will be changed to improve student learning as a result of the evaluation. Include a discussion of how the faculty will help students overcome their weaknesses and improve their strengths.

Based on these findings, we recommend the following actions:

Improvements to AoL process/methods:

1. Change the marketing learning outcome for the BSBA program to be more specific both to the marketing core/required class, and to be more specific in terms of what we want to students to learn.

Improvements to course/curriculum

2. Revisit the “product” questions to determine if they are sufficient as written. Is there something wrong with how the question is phrased that may cause students to perform poorly?
3. Better incorporate the description of product development into the classroom and re-test the students during the next assurance of learning assessment.

## ***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

# BSBA AY 2015-2016 Assessment

## ***Phase 1: Assessment Plan***

### **Learning Outcome assessed:**

#### **BSBA Learning Outcome 10: Strategy and Competitive Advantage**

Develop specific and actionable strategic options at different levels to enhance the organization's competitive position through rigorous analysis of the changes in its competitive environment, its industry/sector, and its internal resources.

### **Assessment Method:**

Final Project Presentation in the BSBA Capstone Course BUS 401

### **Targeted performance, based on rubrics:**

80% meet expectations

### **Evaluation Process:**

Students presented a presentation to a panel of evaluators. Each evaluator scored the team project was on two categories:

- How well was the strategic issue/problem defined? (30pts)
- How good (logical, realistic, and practical) is this team's recommended strategy? (40pts)

An example of the grading system is attached at the end of this report (p4).

### **Rubric:**

No rubric provided

### **Course where learning outcome was assessed:**

BSBA Capstone Class BUS 401 s1-4

### **Evaluator(s):**

3-4 external evaluators (including SOM professor Stephen Morris) judged the content and viability components of the BUS401 students' work.

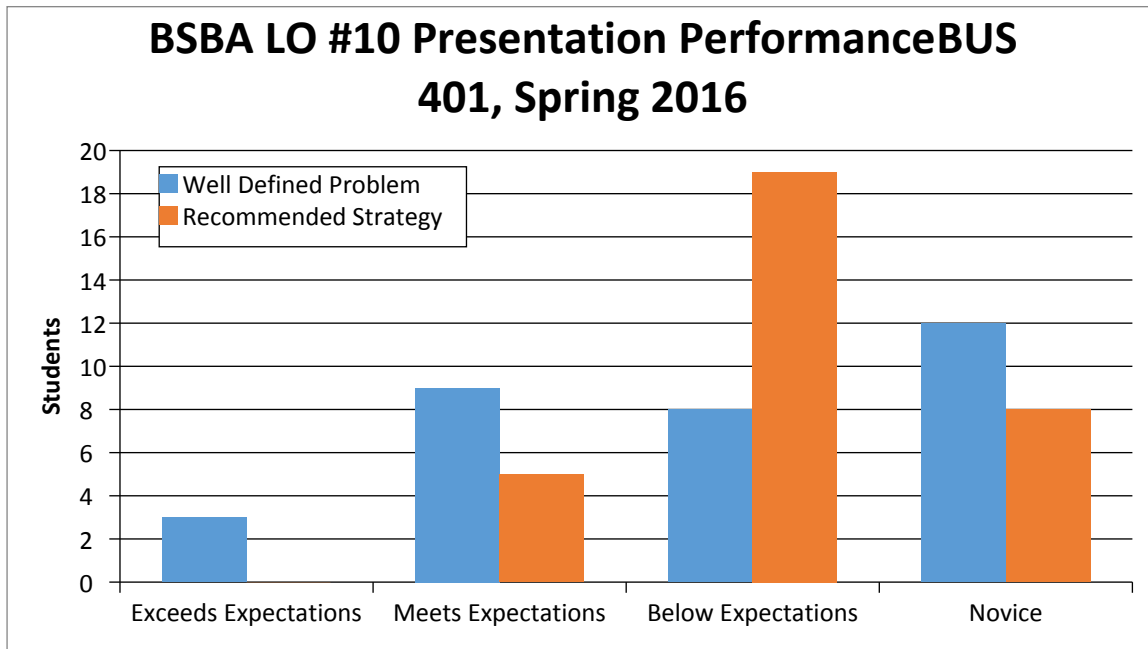


**Phase 2: Results Assessment and Planned Action**

**Results:**

**BUS 401 Presentation Results**

Number of students achieving target Category:	Exceeds Expectations s > 90%	Meets Expectations s 80% - 90%	Below Expectation s 70% - 80%	Novice s < 70%	% Students Meeting or Exceeding Expectations
Well Defined Problem	3	9	8	12	38%
Recommended Strategy	0	5	19	8	16%



**Action:**

What will be done differently as a result of what was learned? Discuss how courses and/or curricula will be changed to improve student learning as a result of the evaluation. Include a discussion of how the faculty will help students overcome their weaknesses and improve their strengths. Also include changes to program goals and objectives, if any.

***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

**Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

**Addendum: Project presentation scorecard**

Note the third evaluation question was not included in this assessment.

Company Name: \_\_\_\_\_

	Score
How well was the <b>strategic issue/problem</b> defined?	( 17 ) / 30
How good (logical, realistic, and practical) is this team's <b>recommended strategy</b> ?	( 30 ) / 40
How well did this team <b>present</b> ? (professional manners, effective delivery of key points)	( <del>25</del> ) / 30 15
<b>Total</b>	( 62 ) / 100

Comments:

Company Name: \_\_\_\_\_

	Score
How well was the <b>strategic issue/problem</b> defined?	( 25 ) / 30
How good (logical, realistic, and practical) is this team's <b>recommended strategy</b> ?	( <del>25</del> ) / 40 30
How well did this team <b>present</b> ? (professional manners, effective delivery of key points)	( 25 ) / 30
<b>Total</b>	( 80 ) / 100

Comments: *Product differentiation opportunity - Good job talking about the issues and choosing the "best option"*

# BSBA AY 2015-2016 Assessment

## Phase 1: Assessment Plan

### Learning Outcome assessed:

#### BSBA Learning Outcome 11: Diversity and Integration

Appreciate diversity and integrate cultural, economic, political, historical, geographic, and environmental perspectives in decision-making.

### Assessment Method:

CATME Team-Maker data from BUS 308

### Targeted performance, based on rubrics:

80% of the students should meet or exceed expectations on the rubric's criterium assessing this learning outcome. The criterium is simply that students have been assigned to ethnically diverse teams.

### Evaluation Process:

Students were placed into three separate teams (sequentially) during the semester. The students worked on three case analyses (first team), a pair of process analysis simulations (second team), and a pair of supply chain simulations (third team). The teams had to answer questions about foundational concepts, develop strategies for and understand the simulations, and play the simulations. They also had to create six reports (two per team).

The screenshot shows the CATME SMARTER Teamwork website. At the top, there is a logo with five colorful icons (yellow, green, blue, purple, red) arranged in a circle, followed by the text "CATME SMARTER Teamwork". Below the logo is a navigation menu with links: HOME, ABOUT, CATME TOOLS, INSTRUCTOR SUPPORT, STUDENT SUPPORT, RESEARCH, MEETING SUPPORT, PHOTOS, CONTACT. There are also buttons for "Login to Existing Account" and "Request an Instructor Account".

The main content area is divided into several sections:

- MISSION STATEMENT:** CATME SMARTER Teamwork prepares students to function effectively in teams and supports faculty as they manage their students' team experiences.
- WHAT CATME CAN DO FOR YOU:** Instructors use the CATME Smarter Teamwork system because they care about their students' success. The CATME tools help students succeed in their class-related team experiences and develop one of the skills that employers value most: the ability to work effectively in teams.
- CITE OUR ACADEMIC ARTICLES:** The CATME system is based on rigorous scholarly work. Please see the "Research" tab and cite our journal articles if you use the system.
- MODEL OF TEAMWORK:** A circular diagram with five colored icons representing team processes: Having Relevant KSAs, Interacting with Teammates, Keeping the Team on Track, Expecting Quality, and Contributing to the Team's Work. Below the diagram is a link: "Preview the Instrument".
- CATME review:** February 10th, 2014. "G. A. Hrivnak reviewed the CATME SMARTER Teamwork system in the 'Book and Resource Reviews' section."

Below the navigation menu, there are two columns of text:

**CATME provides tools for:**

- Assigning students to teams: **CATME Team-Maker**
- Self and peer evaluations and rating team processes: **CATME Peer Evaluation**
- Training students to rate teamwork: **CATME Rater Calibration**
- Training students to work in teams: **CATME Teamwork Training**
- Making meetings more effective: **CATME Meeting Support**

**CATME helps instructors to:**

- Gather information from students and provide feedback to students.
- Understand their student teams' processes, team-members' contributions, and students' perspectives on their team experience.
- Be aware of problems that are occurring on their students' teams
- Hold students accountable for contributing to their teams.
- Use best practices when managing student team experiences.

The teams are created using CATME (<http://info.catme.org>) which was developed from a pair of NSF grants. More information on the formation of the instrument may be found at: <http://info.catme.org/about/who-are-we/>

As part of the Team-Maker process, the BUS 308 course utilized 14 parameters to assign students to teams (there are more parameters if the instructor chooses to use them). The weight assigned to each parameter can be adjusted by the instructor. Here is a screen shot for the parameters for one of the Spring 2016 sections of the course:

**CATME Team-Maker**

Choose Parameters Cancel View Teams/Data Make New Teams

Activity: Biographical Data308-09\_Spring\_2016 Spring 2016 Format: Lecture School: University of San Francisco

Select team size: Maximum team size 4

Parameter	Options	Percentage
Gender	Female (18)	51%
	Male (17)	48%
Race	Asian (20)	57%
	White (8)	22%
	Other (5)	14%
	Black (1)	2%
	Hispanic (1)	2%
GPA	Above 3.66 (7)	20%
	2.67 - 3.66 (25)	71%
	1.67 - 2.66 (3)	8%
	0.67 - 1.66 (0)	0%
	Below 0.67 (0)	0%
Commute	OK (14)	40%
	Prefer (2)	5%
On-Campus Job	On-Campus (2)	5%
	15min (12)	34%
	30min (14)	40%
	Longer (7)	20%
Off-Campus Job	Less than 10 (29)	82%
	10 - 20 (4)	11%
	20 - 40 (0)	0%
	More than 40 (0)	0%
Writing Skills	Less than 10 (16)	45%
	10 - 20 (10)	28%
	20 - 40 (0)	0%
	More than 40 (1)	2%
	None (3)	8%
Commitment Level	Basic (2)	5%
	Average (9)	25%
	Good (19)	54%
	Expert (2)	5%
	2-4 hours per week (16)	45%
Leadership Role	5-7 hours per week (8)	22%
	8-10 hours per week (3)	8%
	Whatever it takes (8)	22%
	Follower (5)	14%
Leadership Preference	Pref Following (9)	25%
	Balanced (14)	40%
	Pref Leading (7)	20%
	Single Leader (5)	14%
Big Picture/Detail-Oriented	One Leader w/ Input (6)	17%
	Shared Leadership (24)	68%
	Visionary (2)	5%
	Prefers Ideas (7)	20%
	Balanced (16)	45%
Prefers Detail (9)	25%	
Details (1)	2%	

One aspect of the Team-Maker process is the ability to integrate teams based on ethnicity and gender. The teams in BUS 308 were integrated based on ethnicity.

**Rubrics:**

No rubric provided.

**Courses where learning outcome was assessed:**

BUS 308 Systems in Organizations and BUS 304 Management and Organizational

**Evaluator(s):**

Stephen Morris

***Phase 2: Results Assessment and Planned Action***

**Results:**

Target Met. CATME data supports that whenever possible, students were placed in ethnically diverse teams. Here is a sample of the data:

	<b>Sex</b>	<b>Race</b>	
sfca.edu	Male	Asian	
usfca.edu	Female	Hispanic	
magel@usfca.edu	Female	White	
@usfca.edu	Male	Asian	
	<b>4.00</b>	<b>-0.75</b>	
ida5@usfca.edu	Male	Hispanic	
ing@usfca.edu	Female	Asian	
@usfca.edu	Female	Hispanic	
usfca.edu	Male	Asian	
	<b>4.00</b>	<b>2.25</b>	
usfca.edu	Female	Asian	
@usfca.edu	Male	Asian	
n@usfca.edu	Male	White	
z3@usfca.edu	Female	Hispanic	
	<b>4.00</b>	<b>2.25</b>	
@usfca.edu	Female	Asian	
@usfca.edu	Female	Asian	
r@usfca.edu	Male	Hispanic	

## **Suggested Action:**

As worded, it is virtually impossible to assess BSBA Learning Outcome #11. Not only does the learning outcome include multiple areas (cultural, economic, political, historical, geographic, and environmental) which would be almost impossible to assess in a single assignment (or even multiple assignments), but the word “appreciate” is not operational. The learning outcome should be rewritten.

The new learning outcome should probably be rewritten with AACSB standards as reference - 9.1.5. Interpersonal relations and teamwork (able to work effectively with others and in team environments); 9.1.6. Diverse and multicultural work environments (able to work effectively in diverse environments) - as well as the relevant USF Institutional learning outcome (The University will distinguish itself as a diverse, socially responsible learning community of high quality scholarship and academic rigor sustained by a faith that does justice.)

The CATME system has a remarkable peer evaluation tool. It can be used to measure AACSB standard 9.1.5 Interpersonal relations and teamwork (able to work effectively with others and in team environments). If the BSBA program decides to incorporate this standard into a learning outcome, it is highly recommended that the school adopt as a standard the peer evaluation tool in CATME.

## **Closing the Loop:**

# BSBA AY 2015-2016 Assessment

## Phase 1: Assessment Plan

Learning Outcome assessed:

### BSBA Learning Outcome 11: Diversity and Integration

Appreciate diversity and integrate cultural, economic, political, historical, geographic, and environmental perspectives in decision-making.

Assessment Method:

Final Project Elevator Pitch Presentation in BSBA Capstone Course BUS 406

Targeted performance, based on rubrics:

80% meet expectations

Evaluation Process:

Final presentations were scored by a team of evaluators using a 4 point rubric. Teams were evaluated on three areas as detailed in the rubric below.

Rubric:

Indicator of Effective Content	Levels of Achievement			
	Beginning	Developing	Competent	Accomplished
<b>Diversity Awareness</b>	Team expresses attitudes and beliefs about target market/users from a one-sided view that is indifferent or resistant to how their product/service leverages the diversity of the target community and culture.	Team exhibits general awareness about the need to tailor attitudes and beliefs associated with their product/services to meet needs of the target market/user.	Team articulates how its perspectives about the target ,market/users was tailored by their market research and/or how market research has influenced their planned target marketing strategies.	Team displays a sophisticated analysis of its target market/users and provides specific examples of its market research and how it has influenced their planned target market/user strategies
<b>Factual Diversity/ Inclusion Knowledge</b>	Team uses some terminology surrounding the diversity of their target market but does not demonstrate and awareness of societal or cultural influences on those perspectives.	Team identifies some elements of the perspectives of a specific social group and provides some explanation of how culture and society influenced those perspectives in their marketing approach.	Team explains important aspects of the perspectives of a specific social group and discusses of how culture and society influenced those perspectives in their marketing approach.	Team provides detailed perspectives of a specific social group and provides comprehensively discusses how culture and society influenced those perspectives in their marketing approach.
<b>Diversity/ Inclusion Practice</b>	Team fails to discuss any marketing or other practices related to the diversity within their target market OR diversity in their planned overall marketing strategies.	Team hints at general marketing or other practices related to the diversity within their target market OR diversity in their planned overall marketing strategies.	Team discusses some general marketing or other practices related to the diversity within their target market OR diversity in their planned overall marketing strategies.	Team discusses specific marketing or other practices related to the diversity within their target market OR diversity in their planned overall marketing strategies.



**Course where learning outcome was assessed:**

BSBA Capstone Course BUS 406 s2

**Evaluator(s):** Two external evaluators from the Arts & Sciences Rhetoric Department.

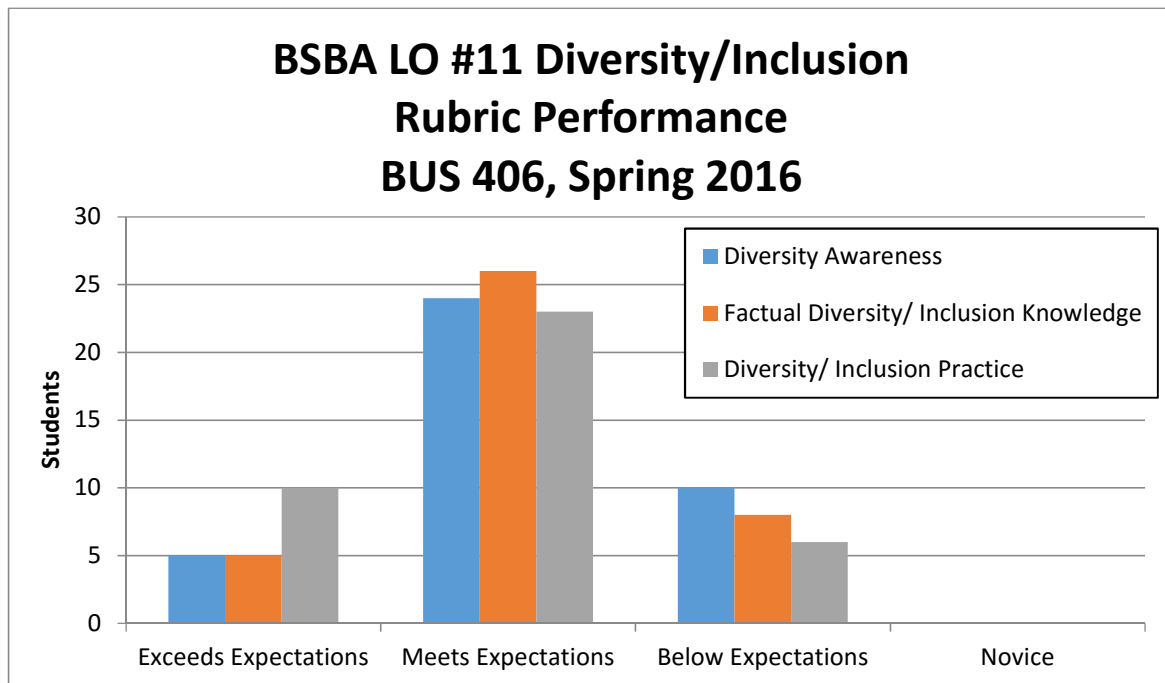
**Phase 2: Results Assessment and Planned Action**

**Results:**

**BUS 406 Diversity/Inclusion Rubric Results**

Number of students achieving target

	Exceeds Expectations	Meets Expectations	Below Expectations	Novice	% Students Meeting or Exceeding Expectations
Categories:	= 4	3 - 4	2 - 3	< 2	
Diversity Awareness	5	24	10	0	74%
Factual Diversity/ Inclusion Knowledge	5	26	8	0	79%
Diversity/ Inclusion Practice	10	23	6	0	85%



**Suggested Action:**

Refine the rubric to better address the diversity portion of the outcome.

***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

**Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

# **BSM Program**

# BSM AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

**BSM Learning Outcome 2: Ethical and legal behavior, and social responsibility**  
Recognize and analyze ethical, legal and social implications of management decisions and devise appropriate responses.

### **Assessment Method:**

Comprehensive Business Exam (CBE 4.2) given to first year students and graduating students

### **Targeted performance, based on rubrics:**

75% of exam questions should be answered correctly.

### **Evaluation Process:**

Comprehensive Business Exam results are scored and binned by question topics provided to us by Pitsco Education. The Comprehensive Business Exam<sup>SM</sup> was developed as a joint venture of Future Business Leaders of America-Phi Beta Lambda, Inc., Pitsco, Inc., and Technological Fluency Institute, Inc.

### **Course where learning outcome was assessed:**

Exam administered in BSM 303 (start of core in program) and in BSM 309 (end of core in program).

A sample of 40 first-year students were tested in spring 2016 and a sample of 46 students completing the program were tested in summer 2016.

### **Evaluator(s):**

Peggy Takahashi

**Phase 2: Results Assessment and Planned Action**

**Results:**

PRE-TEST

<b>Social Environment Overall Percentage of Correct Answers</b>	<b>60.00%</b>
1) Identify ethical issues and choose the most ethical action.	65.83%
2) Demonstrate ethical and social responsibility in given business scenarios.	54.17%
<b>Legal Environment Overall Percentage of Correct Answers</b>	<b>48.75%</b>
1) Identify legal issues and legal risks in business decision making, including the substantive areas of torts, contracts, and sales law.	48.33%
2) Demonstrate knowledge and understanding of the basic concepts of the legal system such as the elements of a contract.	49.17%

POST TEST

<b>Social Environment Overall Percentage of Correct Answers</b>	<b>67.03%</b>
1) Identify ethical issues and choose the most ethical action.	66.67%
2) Demonstrate ethical and social responsibility in given business scenarios.	67.39%
<b>Legal Environment Overall Percentage of Correct Answers</b>	<b>55.07%</b>
1) Identify legal issues and legal risks in business decision making, including the substantive areas of torts, contracts, and sales law.	57.97%
2) Demonstrate knowledge and understanding of the basic concepts of the legal system such as the elements of a contract.	52.17%

## **What did we learn about student learning?**

While students improved in their exam results, the target was not met.

### **Suggested Action:**

Faculty need to include more business scenarios and Silicon Valley context with ethical and social responsibility in the curriculum. Additional elements of legal environment need to be provided in the classroom.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

# BSM AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **BSM Learning Outcome 5: Accounting**

Attain financial literacy in the understanding and interpretation of financial statements of organizations.

### **Assessment Method:**

Comprehensive Business Exam (CBE 4.2) given to first year students and graduating students

### **Targeted performance, based on rubrics:**

75% of exam questions should be answered correctly.

### **Evaluation Process:**

Comprehensive Business Exam results are scored and binned by question topics provided to us by Pitsco Education. The Comprehensive Business Exam<sup>SM</sup> was developed as a joint venture of Future Business Leaders of America-Phi Beta Lambda, Inc., Pitsco, Inc., and Technological Fluency Institute, Inc.

### **Course where learning outcome was assessed:**

Exam administered in BSM 303 (start of core in program) and in BSM 309 (end of core in program).

A sample of 40 first-year students were tested in spring 2016 and a sample of 46 students completing the program were tested in summer 2016.

### **Evaluator(s):**

Peggy Takahashi and Mark Cannice

**Phase 2: Results Assessment and Planned Action****Results:**

## PRE-TEST

<b>Accounting Overall Percentage of Correct Answers</b>	<b>45.39%</b>
1) Identify the basic financial statements and their purposes, and explain their interrelationships.	36.88%
2) List the effects of transactions on the elements of the accounting equations and transaction analysis.	48.13%
3) Demonstrate an understanding of the content, concepts, structure, and meaning of reporting for organizational operations for external use.	54.17%
4) Identify and utilize sources of financial statement information of publicly traded companies.	51.25%
5) Demonstrate a fundamental understanding of accounting terminology.	38.75%

## POST TEST

<b>Accounting Overall Percentage of Correct Answers</b>	<b>48.86%</b>
1) Identify the basic financial statements and their purposes, and explain their interrelationships.	52.72%
2) List the effects of transactions on the elements of the accounting equations and transaction analysis.	45.11%
3) Demonstrate an understanding of the content, concepts, structure, and meaning of reporting for organizational operations for external use.	59.42%
4) Identify and utilize sources of financial statement information of publicly traded companies.	43.48%
5) Demonstrate a fundamental understanding of accounting terminology.	46.20%



## **What did we learn about student learning?**

No evidence present that anything was learned. Target of 75% was not met.

### **Suggested Action:**

The courses in this program are very truncated. We plan to make adjustments to the duration and hours of the course so that students can learn the information provided in the classroom.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

# BSM AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **BSM Learning Outcome 6: Finance**

Use financial information to assess economic value of real and financial assets, and make decisions to create value.

### **Assessment Method:**

Comprehensive Business Exam (CBE 4.2) given to first year students and graduating students

### **Targeted performance, based on rubrics:**

75% of exam questions should be answered correctly.

### **Evaluation Process:**

Comprehensive Business Exam results are scored and binned by question topics provided to us by Pitsco Education. The Comprehensive Business Exam<sup>SM</sup> was developed as a joint venture of Future Business Leaders of America-Phi Beta Lambda, Inc., Pitsco, Inc., and Technological Fluency Institute, Inc.

### **Course where learning outcome was assessed:**

Exam administered in BSM 303 (start of core in program) and in BSM 309 (end of core in program).

A sample of 40 first-year students were tested in spring 2016 and a sample of 46 students completing the program were tested in summer 2016.

### **Evaluator(s):**

Peggy Takahashi

**Phase 2: Results Assessment and Planned Action****Results:**

## PRE-TEST

<b>Finance Overall Percentage of Correct Answers</b>	<b>40.63%</b>
1) Demonstrate an understanding of the valuation effects of each financial decision.	25.83%
2) Demonstrate an understanding of the risk-return relationship and its effects on decision making.	56.67%
3) Demonstrate the ability to access and use basic tools to calculate and measure financial outcomes.	39.17%
4) Identify the major financial statements of a corporation and indicators of good performance.	40.83%

## POST TEST

<b>Finance Overall Percentage of Correct Answers</b>	<b>42.39%</b>
1) Demonstrate an understanding of the valuation effects of each financial decision.	33.33%
2) Demonstrate an understanding of the risk-return relationship and its effects on decision making.	50.72%
3) Demonstrate the ability to access and use basic tools to calculate and measure financial outcomes.	34.78%
4) Identify the major financial statements of a corporation and indicators of good performance.	50.72%

## **What did we learn about student learning?**

Target was not met. There is no finance core course in the curriculum.

### **Suggested Action:**

We plan to add preparatory math and micro-economics courses in addition to a core finance course in the revised BSM curriculum to launch, tentatively, fall 2017.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

# **BSM AY 2015-2016 Assessment**

## ***Phase 1: Assessment Plan***

### **Learning Outcome assessed:**

**BSM Learning Outcome 7: Organizational Behavior and Theory**  
Develop and leverage human and social capital in organizations.

### **Assessment Method:**

Comprehensive Business Exam (CBE 4.2) given to first year students and graduating students

### **Targeted performance, based on rubrics:**

75% of exam questions should be answered correctly.

### **Evaluation Process:**

Comprehensive Business Exam results are scored and binned by question topics provided to us by Pitsco Education. The Comprehensive Business Exam<sup>SM</sup> was developed as a joint venture of Future Business Leaders of America-Phi Beta Lambda, Inc., Pitsco, Inc., and Technological Fluency Institute, Inc.

### **Course where learning outcome was assessed:**

Exam administered in BSM 303 (start of core in program) and in BSM 309 (end of core in program).

A sample of 40 first-year students were tested in spring 2016 and a sample of 46 students completing the program were tested in summer 2016.

### **Evaluator(s):**

Peggy Takahashi and Mark Cannice

**Phase 2: Results Assessment and Planned Action**

**Results:**

PRE-TEST

<b>Management Overall Percentage of Correct Answers</b>	<b>52.33%</b>
1) Select the appropriate management action in a business scenario involving employee supervision/evaluation.	49.17%
2) Demonstrate an understanding of management and leadership and their differences.	56.67%
3) Describe and explain the manner in which all of the functional areas in business operate, emphasizing business management.	50.00%
4) Demonstrate an understanding of the other managers and the human resource management process.	52.50%

POST TEST

<b>Management Overall Percentage of Correct Answers</b>	<b>60.14%</b>
1) Select the appropriate management action in a business scenario involving employee supervision/evaluation.	58.70%
2) Demonstrate an understanding of management and leadership and their differences.	58.70%
3) Describe and explain the manner in which all of the functional areas in business operate, emphasizing business management.	65.22%
4) Demonstrate an understanding of the other managers and the human resource management process.	56.52%

## **What did we learn about student learning?**

Students did not meet that target of 75%, however, there were improved scores in all areas for this LO upon completion of the program.

### **Suggested Action:**

The curriculum needs to place additional focus on 2) Demonstrate an understanding of management and leadership and their differences. We recommend incorporating more local leaders into the classroom to help students gain additional perspective.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.  
t cycle is complete, the results can be added to this document to finalize the report.

# **BSM AY 2015-2016 Assessment**

## ***Phase 1: Assessment Plan***

### **Learning Outcome assessed:**

#### **BSM Learning Outcome 9: Marketing**

Produce specific marketing tools needed for product development, consumer communications, pricing and distribution channels.

### **Assessment Method:**

Comprehensive Business Exam (CBE 4.2) given to first year students and graduating students

### **Targeted performance, based on rubrics:**

75% of exam questions should be answered correctly.

### **Evaluation Process:**

Comprehensive Business Exam results are scored and binned by question topics provided to us by Pitsco Education. The Comprehensive Business Exam<sup>SM</sup> was developed as a joint venture of Future Business Leaders of America-Phi Beta Lambda, Inc., Pitsco, Inc., and Technological Fluency Institute, Inc.

### **Course where learning outcome was assessed:**

Exam administered in BSM 303 (start of core in program) and in BSM 309 (end of core in program).

A sample of 40 first-year students were tested in spring 2016 and a sample of 46 students completing the program were tested in summer 2016.

### **Evaluator(s):**

Peggy Takahashi and Mark Cannice



**Phase 2: Results Assessment and Planned Action****Results:**

## PRE-TEST

<b>Marketing Overall Percentage of Correct Answers</b>	<b>42.92%</b>
1) Identify components of the marketing mix.	38.33%
2) Demonstrate an understanding of the social/cultural; legal, political and regulatory; economic; technological; and competitive environments on marketing products and services in a global society.	42.50%
3) Demonstrate an understanding of the synergistic effects of combining product, promotion (communication), price, and distribution decisions relevant to market opportunities and applying this understanding to the development of a marketing plan.	55.83%
4) Explain how consumers purchase and evaluate services.	35.00%

## POST TEST

<b>8) Marketing Overall Percentage of Correct Answers</b>	<b>49.09%</b>
1) Identify components of the marketing mix.	50.00%
2) Demonstrate an understanding of the social/cultural; legal, political and regulatory; economic; technological; and competitive environments on marketing products and services in a global society.	44.20%
3) Demonstrate an understanding of the synergistic effects of combining product, promotion (communication), price, and distribution decisions relevant to market opportunities and applying this understanding to the development of a marketing plan.	60.87%
4) Explain how consumers purchase and evaluate services.	41.30%

## **What did we learn about student learning?**

Overall students did not meet the targeted performance of 75%. However, students did show an improvement in knowledge of areas 1) Identify components of the marketing mix. And 4) Explain how consumers purchase and evaluate services. We need to make more emphasis in the curriculum on area 2) Demonstrate an understanding of the social/cultural; legal, political and regulatory; economic; technological; and competitive environments on marketing products and services in a global society.

### **Suggested Action:**

Results show us that we need to provide additional cultural and global perspectives in the marketing curriculum.

Additionally, the Marketing Learning Outcome was rewritten in summer 2016 to address what students learn in the marketing core of the business program.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

# **MBA Program**

# MBA AY 2015-2016 Assessment

## **Phase 1: Assessment Plan**

### **Learning Outcome assessed:**

#### **MBA Learning Outcome 2: Practical Problems**

Students will apply theory to solve practical problems.

### **Assessment Method:**

Combined performance on questions selected from midterm exam.

### **Targeted performance, based on rubrics:**

80% meet expectations

### **Evaluation Process:**

The outcome was assessed through direct examination. Students were scored on selected questions from Midterm Exam 1 in BUS 6607 (attached, p.4-6).

Multiple Choice Q6, 7, 10, 11: 3.5pts each for a total of	14.0 pts
Short Answer Q1, Q2, Q3: 6.5pts, 5pts, 6pts for total of	17.5 pts
<u>Essay Q1, Q2: 15pts, 17pts for total of</u>	<u>32.0 pts</u>
Total possible score:	63.5 pts

The assessment bins (meets, exceeds, below expectations and novice) are based on the percentage of points the student received out of a possible score of 63.5.

### **Rubric:**

No rubric provided.

### **Course where learning outcome was assessed:**

MBA 6607: Corporate Entrepreneurship and Innovation, section 1

### **Evaluator(s):**

Roger Chen

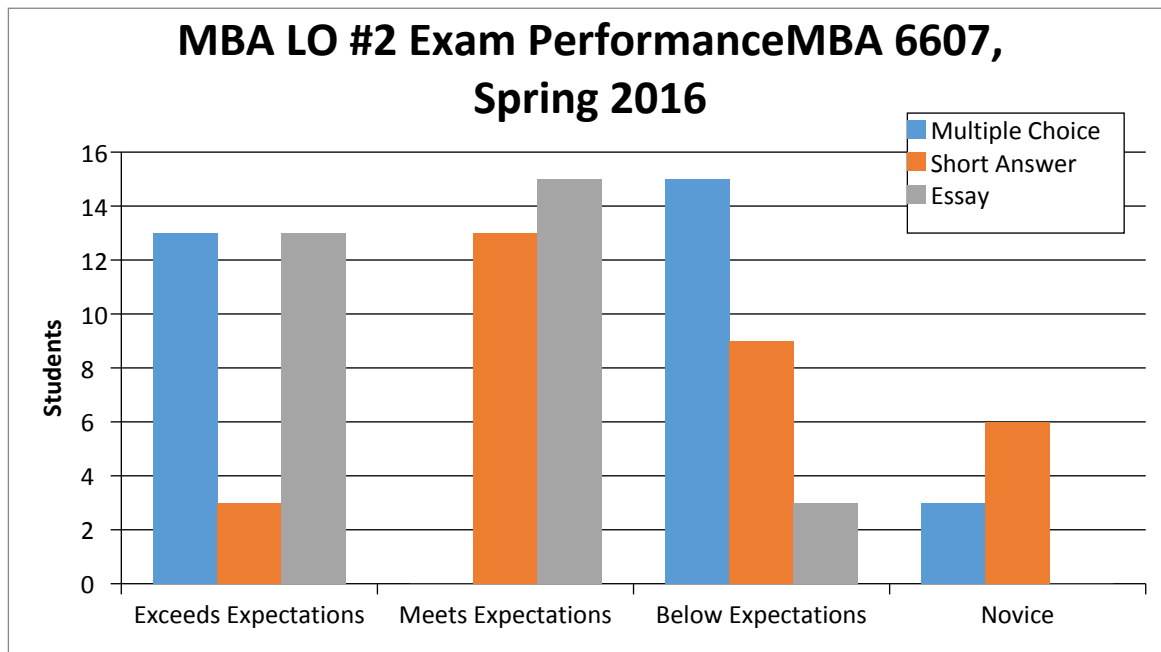
**Phase 2: Results Assessment and Planned Action**

**Results:**

**BUS 6607 Exam Results**

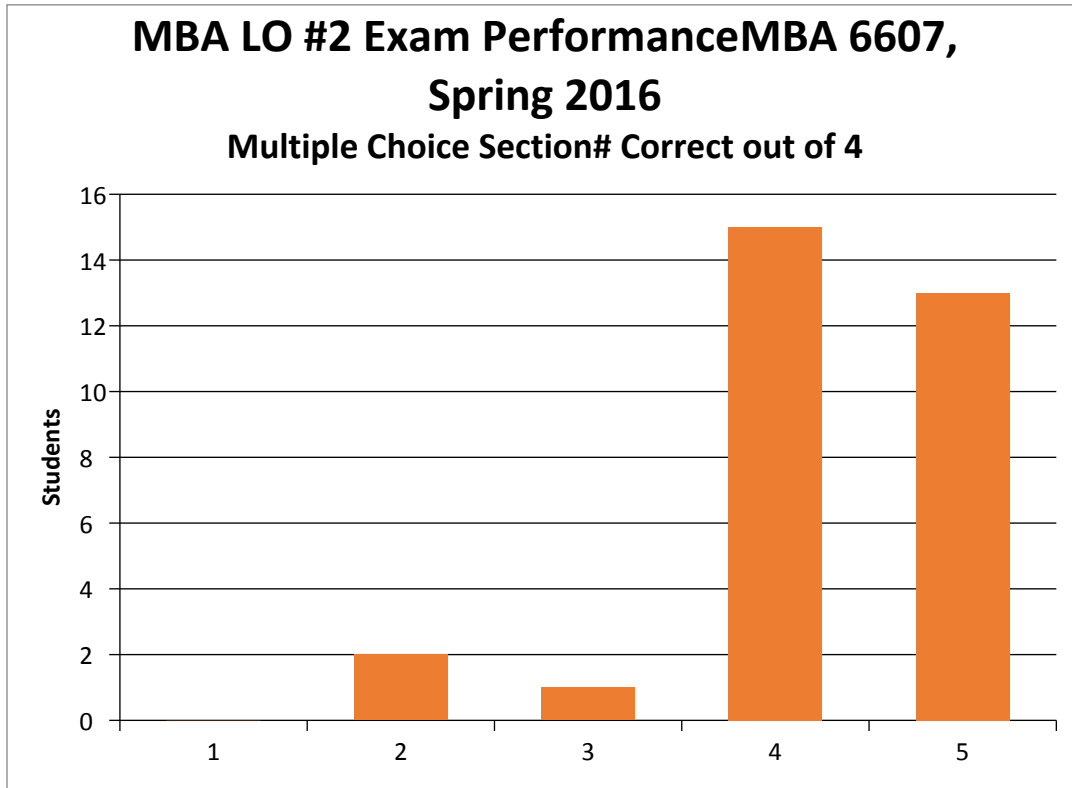
Number of students achieving target

Test Section:	Exceeds Expectations > 90%	Meets Expectations 80% - 90%	Below Expectations 70% - 80%	Novice < 70%	% Students Meeting or Exceeding Expectations
Multiple Choice	13	0	15	3	42%
Short Answer	3	13	9	6	52%
Essay	13	15	3	0	90%



**Multiple Choice Performance:**

**Individual performance on each question can be found in the addendum.**



### **Suggested Action:**

There is a disparity in student performance between multiple choice and essay questions. A rubric is needed to measure essay questions to ensure that measurement is based on an achievement of outcomes rather than performance in the class.

In the future we should sample across additional sections in order to assess a larger cross section of students.

MBA 6015 may be a more appropriate course in which to assess this outcome.

### ***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

#### **Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

## Addendum: Exam questions used for this evaluation

### Multiple Choice Result Detail

	% of Students Answering Correctly	nStudents Answering Correctly
<p>6. Currently, company Blue Sky's main business model is manufacturing and selling product MM. Now, Blue Sky tries to change its business model to a long tail model. With this change to the long tail model, Blue Sky will also most likely adopt which of the following business practice?</p> <p>(a). Proprietary model.                      (b). Total solution practice.                      (c). Multi-sided platform model.                      (d) None of the above</p>	<b>84%</b>	26
<p>7. Company X has two business lines: (a) selling equipment, (b) maintenance of the equipment that X sells. X plans to adopt U-Haul type of strategy. Top management of X sets equal expectations/performance targets on the profitability (defined by the ratio between net profit and sales) for both product lines. Based on our class discussion, what is your comment on X's profit performance target policy on both product lines?</p> <p>(a). The company shall not emphasize profit in its performance policy.                      (b). the company did a good job in emphasizing profits in its performance targets.                      (c). the company made a mistake in its profit target policy.                      (d). None of the above.</p>	<b>68%</b>	21
<p>10. According to our discussion in the class, which of the following is true?</p> <p>(a) If a small company finds a newly opened business/market opportunity created by a large competitor, the small company should consider differentiation strategy if it decides to enter the market.                      (b). When a large competitor attacks a small company (or a company with limited resources) in a market, the small company (or a company with limited resources) shall always abandon the market so as to avoid direct competition with the large competitor.                      (c). If a small company misses the opportunity of enjoying first mover advantages, this small company shall try to create late and slow mover advantages.                      (d). If a small company finds a newly opened market opportunity created by a large firm, speed of entering into the new market is important for capturing the new market opportunity if the small company decides to enter the market.                      (e). both (a) and (d) are correct.</p>	<b>87%</b>	27
<p>11. According to our class discussion, company XYZ should do which of the following to make it difficult for competitors to copy its strategy?</p> <p>(a). To make each activity within its (XYZ's) system more independent from each other, thus to increase its flexibility.                      (b). To make each activity within its system reinforce/support each other.                      (c). To reduce the number of activities in its internal activity system, thus to reduce complexity.                      (d). None of the above.</p>	<b>87%</b>	27



**B. Fill in Blank Questions (*Please make your writing legible or you will lose points*)**

(unless otherwise indicated, each question is worth 5 points)

1. Company TPI tries to migrate from selling a basic product to selling customer solutions. TPI can benefit MOST DIRECTLY from the ideas of which ONE of the following models to maximize its profit: Pyramid, transaction scale, multiplier models, local leadership, or the company can benefit equally (or benefit none) from these models? (6.5 points)

Choice 1: TPI can benefit MOST DIRECTLY from \_\_\_\_\_ model,  
Reason \_\_\_\_\_ (70 words or less)

Or

Choice 2: TIP can benefit EQUALLY from these models \_\_\_\_\_ (check here)  
Reason \_\_\_\_\_ 70 words or less)

2. According to our class discussion, which conceptual framework can help us predict/analyze the losses or reductions of the profitability of a value chain market?

\_\_\_\_\_ (7 words or less).

4. David is very passionate about hairstyling and is very interested in operating his own hair salon business. But the “industry structure” of hair salon market is not attractive: little economies of scale, easy to enter, labor intensive (hard work), customers can easily switch vendors, etc.

What should David do to enter this industry, thus to mitigate the weakness of the industry structure and to create some competitive advantages for him? **Suggest one strategy. Your answer needs to apply our learning on firm strategy to deal with industry structure covered in the industry/market analysis class. You also need to name the specific learning point or exam we discussed in that class in your answer(6 points)**

**C. Essay Question (*Please make your writing legible or you will lose points*)**

1. Company M recently developed a great product, Star-Fly. The product is very successful and generated great awareness among many people. But due to the nature of the business (short product life cycle), the physical part of Star-Fly product will only have two years’ time to be sold to customers, after the two years, company M will no longer be able to generate revenue by selling the physical Star-Fly product, and the physical part of the Star-Fly product will stop function after two years. Also, due to technical reasons, it will be very difficult (not economically viable) to develop new versions of Star-fly after the two years

Given this situation, which business model (we discussed in the class) will allow M to leverage Star-Fly’s huge success now and help M generate some revenues after Star-Fly’s physical products stop generating revenue two years later. **(15 points).**

2 “EMS ” Inc. and “TYCo” compete in several business areas. Their product/business line information is as follows:

Business/Product of “EMS” Inc. (in thousand) Product lines	B1	B2	B3	B4	B5	Total Corporate Net Sales (in thousand \$)
Market shares in each market	48%	40.2%	12%		13%	21%
Net Sales in each market	\$654.5	\$1800	\$349.8	\$434.23	\$1199.1	\$4437.63

(a). “EMS” is considering whether or not it is possible to use aggressive low price strategy to deal with its key competitor, TYCo. Specifically, EMS is wondering if it can find a product market where it can aggressively lower its price (at or even slightly below its cost level) in the market to compete with TYCo. EMS hopes that this low price strategy will have minimum financial impact on itself and can potentially create serious financial damage or problem for TYco. Can “EMS” find such a product market where it can lower its prices and achieve the above goals? If no, why? If yes, which product market and why (please provide evidences)

The net profit margin ratios at this point( i.e. the percentage of net sales that becomes net profit) in different business lines are as follows: B1: 25%, B2: 20%, B3: 65%, B4: 20%, B5: 7%. The net profit margin ratios in each product line are the same for both companies).

(b). Conceptually, does this question help us think about how to manage a company’s “low profit” businesses (e.g., a company’s small, insignificant business lines)? If no, why? If yes, why? ***Also, How does your answer differ from BCG’s general strategy of dealing with “dog” business?***

**Assumption in this question:** these markets/businesses do not face other dramatic changes. You do not need to consider other competitors’ reactions and other factors in this scenario.

**(Maximum length of answers to both (a) and (b): 0.75 page). (total: 17 points)**

# MBA AY 2015-2016 Assessment

## ***Phase 1: Assessment Plan***

### **Learning Outcome assessed:**

#### **04) Legal, Ethical and Social Concerns**

Students will integrate legal, ethical and social concerns into business decisions.

Proposed new language for the MBA LO #4 (derived from MBA Learning Goal 3 and in light of AACSB 9.1.2 and 9.2.2): "Students will identify and describe stakeholders across multiple sectors; connect ethical theory to stakeholder values; recognize and interpret societal context that influences stakeholders."

### **Assessment Method:**

Case study: 2 individual written assignments (one analysis; one reflection)

### **Targeted performance, based on rubrics:**

10% of students will "exceed expectations" and 70% will "meet expectations" of each case study assignment rubric (enrollment yet to be determined).

### **Evaluation Process:**

**CASE STUDY:** Students read and respond to an extended case study of that requires reading from multiple points of view to establish the cultural, social, and ethical context of a business practice that tries to apply principles of corporate social responsibility.

Assignment One: After meeting as groups and working together to apply the elements of the LCA case to the Case Study template, paying particular attention to what information does not fit into the template and what relevant information may be missing, write a 3-5 page analysis in which you consider the applicability, if any, of Lowney's use of Jesuit values to management practice as you reflect on the LCA case and all the stakeholders your group identified. Are his these principles operative in the LCA case? Are there ways of interpreting the case by applying and/or dismissing Lowney's principles? What other ethical theories that we have studied have relevance to the case?

Assignment Two: One reflection St. Ignatius practiced was "composition of place," wherein he would imagine himself in the biblical scenes he read described in scripture. This was his attempt to understand more deeply the context in which scripture emerged so that he might have a better appreciation for its meaning in his life. Try doing this and put yourself in El Salvador at the time of the murders or now under the circumstances faced by League Collegiate Wear. What is evoked by your empathetic engagement? Use this technique to reflect on the the role of religion or personal value systems, or any other relevant influence that shapes your moral decision-making as applied to this two-week sequence of readings.

Data compiled from student grades assessed by descriptive rubrics that were developed and applied to grading Assignment One (analysis) and Assignment Two (reflection). In AY 14-15 I was measuring a

new learning outcome and two content changes: new assignments and new descriptive criteria. So this time I measured the descriptive rubric.

**Rubric:**

To “meet expectations” standards on both assignments:

Students will accurately use course content to develop, support, and express their understanding of the case from multiple points of view; Analyze case with clarity and precision; independently apply ethical theory to interpret issues presented by the case; demonstrates ethical self-awareness by discussing in detail both core beliefs and the origins of those beliefs in relation to the case study.

To “exceed expectations” standards on Assignment One (analysis):

Student names the theory or theories, can present the gist of said theory or theories, and accurately explains the details of the theory or theories used; Student can recognize basic and obvious ethical issues and grasp (incompletely) the complexities or interrelationships among the issues. Student states a position and can state the objections to, assumptions and implications of and can reasonably defend against the objections to, assumptions and implications of different ethical perspectives/concepts, and the student's defense is adequate and effective

To “exceed expectations” standards on Assignment Two (reflection):

Student discusses in detail/analyzes both core beliefs and the origins of the core beliefs and discussion has greater depth and clarity; Student can independently apply ethical perspectives/concepts to an ethical question, accurately, and is able to consider full implications of the application. Student can recognize ethical issues when presented in a complex, multilayered (gray) context AND can recognize cross-relationships among the issues

**Course where learning outcome was assessed:**

MBA 6012 Ethics and Social Responsibility

**Evaluator(s):**

Kimberly Rae Connor, PhD

**Program Assessment Activities:**

## ***Phase 2: Results Assessment and Planned Action***

### **Results:**

I learned that the rewritten learning outcome continues to be effective to accurately portray the learning in MBA 6012 and that students still perform well on the re-developed assignments.

Assignment One: Out of a class of 31 students, 27 “exceeded expectations”. 4 students “met expectations”.

Assignment Two: Out of a class of 31 students, 31 “exceeded expectations”.

I also found, however, that the narrative or descriptive rubrics should be translated into a more useful grid to measure student performance. Since I have demonstrated that the new learning outcome was accurate and the assignments were successful in demonstrating learning, this time I will focus on developing the rubrics to see if I can increase student learning and also benefit from more specific data by which to measure that learning. I also recognize the need for an external grader to validate findings.

### **Action:**

Develop and apply grid rubrics for analysis and reflection assignments. Aggregate data and compare to earlier iterations of MBA 6012. Propose new Learning Outcome to AoL committee/GPC.

## ***Phase 3: Closing the Loop***

### **Change Assessment**

### **Suggested Actions:**

# MBA AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **MBA Learning Outcome 5: Leadership and Communication Skills**

Students will possess effective leadership and communication skills & strategies.

### **Assessment Method:**

Evaluations of Final Project Presentation

### **Targeted performance, based on rubrics:**

80% meet expectations

### **Evaluation Process:**

Students delivered a final presentation and were scored on against 4 pt rubrics for content and delivery. The groups were scored together on their content, and as individuals for their delivery.

### **Rubric:**

2 rubrics were applied to this evaluation. See addendum (p6-7) for details.

### **Course where learning outcome was assessed:**

MBA 6013 Strategic Management in the Global Environment, section 1

### **Evaluator(s):**

Stephen Morris

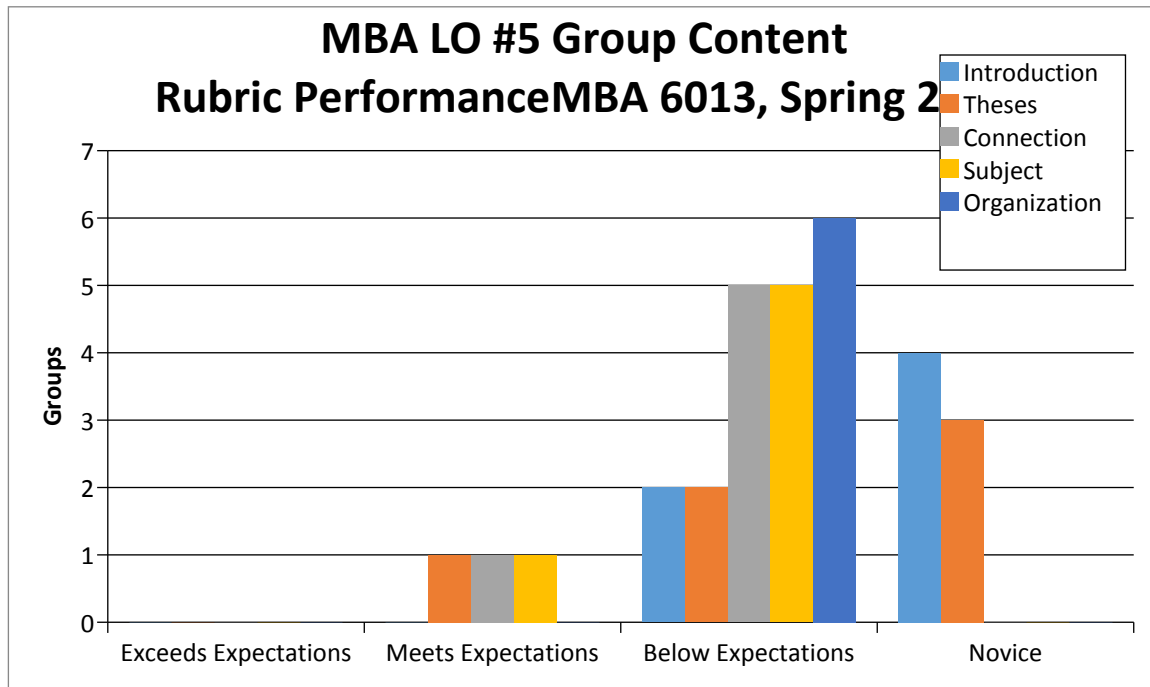
**Phase 2: Results Assessment and Planned Action**

**Results:**

**MBA 6013 Group Content Rubric Results**

Number of groups achieving target

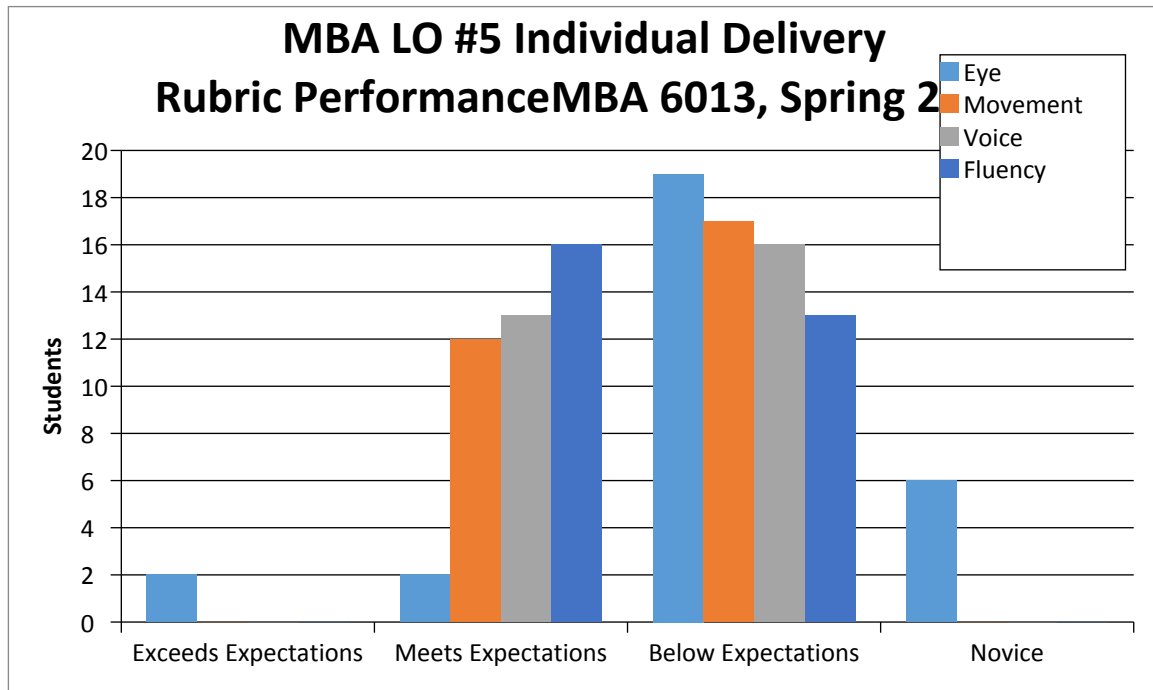
Categories:	Exceeds Expectations s = 4	Meets Expectations s = 3 - 4	Below Expectations s = 2 - 3	Novice s < 2	% Groups Meeting or Exceeding Expectations
Introduction	0	0	2	4	0%
Theses	0	1	2	3	17%
Connection	0	1	5	0	17%
Subject	0	1	5	0	17%
Organization	0	0	6	0	0%



### MBA 6013 Individual Delivery Rubric Results

Number of students achieving target

Categories:	Exceeds Expectations = 4	Meets Expectations 3 - 4	Below Expectations 2 - 3	Novice < 2	% Students Meeting or Exceeding Expectations
Eye	2	2	19	6	14%
Movement	0	12	17	0	41%
Voice	0	13	16	0	45%
Fluency	0	16	13	0	55%





**Suggested Action:**

This outcome should be assessed in multiple sections and courses for a larger sample that includes both full time and part time students.

Use of external evaluator is good.

***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

**Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

**Addendum: Rubrics used for this evaluation**

**Rubric for the Assessment of Oral Communication: Content**

Indicators of Effective Content	Levels of Achievement			
	Beginning	Developing	Competent	Accomplished
<b>Introduction:</b> gains attention, connects to topic, establishes credibility	No attention getting strategy was evident. No clear or relevant connection to topic or speech purpose. No credibility was established.	Use of attention getting strategy, but did not seem to adequately capture audience attention and/ or lead to desired outcome. Credibility was implied.	Effective strategy to capture listeners' attention. Adequate introduction of the topic. Credibility was established by the speaker.	Creative attention getting strategy captures listeners' attention to introduce the topic. It is relevant to the topic and clearly gains the desired response from the audience. Credibility was established by speaker.
<b>Thesis Statement:</b> explicit, identifies topic, previews main points	No thesis statement. Main points are not clearly identified, audience unsure of the direction of the message.	Thesis is implied, although not explicitly stated. Topic is clearly identified, but main points are not clearly previewed.	Thesis statement identifies topic and lists/previews main points.	Speaker clearly stated a well formulated thesis statement during the speech introduction. Thesis statement identifies topic and lists/previews main points.
<b>Connection to Audience:</b> needs & interest, demonstrates understanding	Topic seems irrelevant to audience needs and interests. No attempt made to connect topic to audience.	Topic seems somewhat relevant to audience. Vague reference to audience needs and or interests. Identifies target audience.	Clearly stated the relevance of topic to audience needs and interests. Expresses an understanding of their target audience.	Connection of topic to audience needs and interests is stated with sophistication. Identifies and expresses a deep understanding of their target audience.
<b>Subject Knowledge:</b> depth of content, relevant support, clear explanation	Provides irrelevant or no support. Explanation of concepts is inaccurate or incomplete.	Provides some support for main points, but needed to elaborate further with explanations, examples, descriptions, etc. Support is relevant, but not timely.	Main points adequately substantiated with timely, relevant and sufficient support. Accurate explanation of key concepts.	Depth of content reflects thorough understanding of topic. Main points well supported with timely, relevant and sufficient support. Provided precise explanation of key concepts.
<b>Organization:</b> main points distinct from support, transitions, coherence	Lack of structure. Ideas are not coherent. No transitions. Difficult to identify introduction, body, and conclusion.	General structure/organization seems adequate. Difference between main points and supporting details is blurred. Logical flow, but no clear signposts for transitions.	Clear organizational pattern. Main points are distinct from supporting details. Smooth transitions differentiate key points.	Effective organization well suited to purpose. Main points are clearly distinct from supporting details. Graceful transitions create coherent progress toward conclusion.

## Rubric for the Assessment of Oral Communication: Delivery

Indicators of Effective Delivery	Levels of Achievement			
	Beginning	Developing	Competent	Accomplished
<b>Eye Contact:</b> establish rapport; expand zone of interaction	Reads speech from notes/manuscript. Avoids eye contact with audience.	Conspicuous use of speaker notes. Only occasional, sporadic glances at audience.	Eye contact establishes rapport with audience. Unobtrusive use of speaker notes. Scanning of audience to establish a zone of interaction.	Consistently uses eye contact to maintain rapport with audience. Inconspicuous use of speaker notes. Effective use of scanning to expand zone of interaction.
<b>Movement:</b> expressive, comfortable, enhances message	Body language is not supportive of the message, may contradict it. Gestures, facial expressions, and posture are stiff or distracting.	Body language is a minimal support of the verbal message. Gestures, facial expressions, and posture reflect speaker discomfort that occasionally interferes with the message.	Body language is an adequate support of the message. Movement and gestures clarify key points. Facial expressions and posture seem comfortable.	Gestures, facial expressions, and posture reinforce and enhance the verbal message. Body language is expressive, dynamic, natural and comfortable.
<b>Voice:</b> rate, pitch, volume and tone are natural and authentic	Fails to maintain audience interest and support the verbal message due to excessive monotone, inappropriate rate and volume. Pitch may be strained or flat.	Inconsistent use of voice to support message. Monotone passages interfere with audience interest. Rate may be too fast or slow; volume too high or low. Pitch is strained at times, too artificial or too nervous.	Tone fits verbal message, changing for emphasis at appropriate moments. Rate and volume allow audience to follow message. Pitch seems natural to speaker.	Tone is authentic and appropriate to topic. Rate, pitch and volume vary at key points to support the verbal message and keep audience interest. Voice is natural to the speaker and topic, talking with rather than at audience.
<b>Fluency:</b> pronunciation, enunciation, articulation are smooth; lack of fillers	Incoherent presentation due to many factors that undermine fluency including poor pronunciation. Long pauses interrupt flow of speech. Excessive use of vocalized fillers distracts audience.	Pronunciation is mostly correct yet enunciation and articulation are still tentative. Speaker recovers from awkward pauses and proceeds. Vocalized fillers are noticeable but not excessive.	Careful pronunciation supports coherence of presentation. Enunciation and articulation of words are mostly clear. Pauses were momentary and did not interrupt fluency of speech. Vocalized fillers are minimal and do not distract the audience.	Coherence of presentation strongly supported by correct pronunciation, confident enunciation and articulation. Pauses are purposeful and enhance fluency of speech. Virtually no vocalized fillers are noticeable.

This rubric is intended for use in the assessment of student achievement at the institutional level. It can also be used as a guide for development of rubrics to measure writing at the program, course and section levels. Please send your comments and suggestions about this rubric to Kurt Ewen, LET Co-chair [kewen@valenciacollege.edu](mailto:kewen@valenciacollege.edu). For more information <http://valenciacollege.edu/learningevidence/>

# **EMBA Program**

# EMBA AY 2015-2016 Assessment

## ***Phase 1: Assessment Plan***

### **Learning Outcomes assessed:**

#### **EMBA Learning Outcome 2: Prepare Data and Findings**

Prepare data and findings and proposed partnerships in a way that is honest, transparent, and socially just.

#### **EMBA Learning Outcome 3: Identify Ethical Challenges**

Identify the challenges of conducting business efficiently and ethically in the global environment.

#### **EMBA Learning Outcome 5: Analyze information and data**

Analyze and apply information and data to business decisions.

#### **EMBA Learning Outcome 7: Create Cohesive Plans**

Synthesize ideas from various business areas into a cohesive, creative plan or vision.

These Correspond to AACSB Standards Mapped to Learning Outcomes:

9.3.1 – Leading in organizational situations

9.3.2 – Managing in a global context

9.3.3 – Thinking creatively

9.3.4 – Making sound decisions and exercising good judgment under uncertainty

9.3.5 – Integrating knowledge across fields

### **Assessment Method:**

Case study assignment

### **Targeted performance, based on rubrics:**

80% meet expectations

### **Evaluation Process:**

The following rubric was created to assess the learning outcomes of a case study in the EMBA Ethics and Social Responsibility class. A full copy of the assignment is in Appendix #1 of this document. The rubric was developed for the Spring cohort of the class (#27 – 2016 - 15 Students /9 Sampled) and

the retrospectively applied to cohort (#26 – 2015 - 13 Students/10 Sampled). This document outlines the following:

- A. Learning objectives of the case (numbered 1-3).
- B. EMBA Assessment Schedule Learning Outcomes Under Assessment:
- C. AACSB Standards Mapped to Learning Outcomes:
- D. Evaluation Rubric: Four Point Scale

Learning Objectives of Case (as outlined to students):

1. To assess your depth of knowledge around ethics in the context of the wider organization.
2. To allow an opportunity to demonstrate your critical insight on an actual (or possible) ethical situation.
3. To write a concise, argumentative, and conclusive article for general (rather than purely academic) consumption.

**Rubric:**

	<b>Exemplary</b>	<b>Accomplished</b>	<b>Developing</b>	<b>Foundational</b>
<b>Content</b>	<ul style="list-style-type: none"> <li>• Articulates a specific and comprehensive approach to the ethical issues in a scholarly and professional manner.</li> <li>• Demonstrates an ability to perceive and express multiple sides of an ethical issue.</li> <li>• Displays a tolerance of moral ambiguity.</li> <li>• Offers decisive behavioral direction while describing the associated moral limitations</li> </ul>	<ul style="list-style-type: none"> <li>• Thoughtfully analyzes multiple situations across the realm of ethics and social responsibility.</li> <li>• Identifies and connects themes within the moral spectrum and can extrapolate implications beyond the examples given.</li> <li>• Able to use scholarly analysis as a catalyst towards self-inquiry and development.</li> <li>• Recognizes the complexity and interconnectedness between moral and organizational behavior.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates working knowledge of the major ethical themes and scholarly debates around ethics and social responsibility.</li> <li>• Offers limited independent analysis of the issues.</li> <li>• Uses major themes to advance or illustrate personal inquiry.</li> <li>• Questions established views. Highlights moral ambiguity.</li> </ul>	<ul style="list-style-type: none"> <li>• Mentions some issues in the ethics and social responsibility arena.</li> <li>• Limited engagement in discussion or evaluation of the moral spectrum of the issues at hand.</li> <li>• Limited self-reflection or behavioral analysis of moral potential.</li> <li>• Confined to generalities rather than organizational specificity.</li> </ul>
<b>Style</b>	<ul style="list-style-type: none"> <li>• Excellent breadth and depth of analysis.</li> <li>• Very good originality and insight and excellent ability to critically evaluate, contrast, and ‘play’ with the research and argument contained within a broad range of relevant literature, including recent work in this area.</li> <li>• Clearly and concisely argued and analyzed throughout.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates a good understanding of the question and a moderately good breadth of reference to the relevant literature. Limited in critical evaluation and comparison of the literature considered.</li> <li>• Good breadth of material relevant to the question. Some critical evaluation and contrasting of the relevant literature. Some depth of analysis, though lacking in originality or insight.</li> <li>• Good breadth and depth of analysis. Demonstrates moderately good ability to critically evaluate and contrast research and argument within the relevant literature. Some originality and insight.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates a clear understanding of the question and an awareness of the key issues.</li> <li>• Evidence of a moderate reading of the core material though with limited breadth or depth of analysis.</li> <li>• Lists the key points of the relevant literature but does not critically compare or evaluate them.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates a basic or limited understanding of the question and addresses a small number of relevant issues.</li> <li>• Shows evidence of limited awareness of the core material, with some reference to relevant literature.</li> <li>• Superficial treatment, limited evaluation and description.</li> </ul>

**Courses where learning outcome was assessed:**

EMBA 6915, Ethics and Social Responsibility

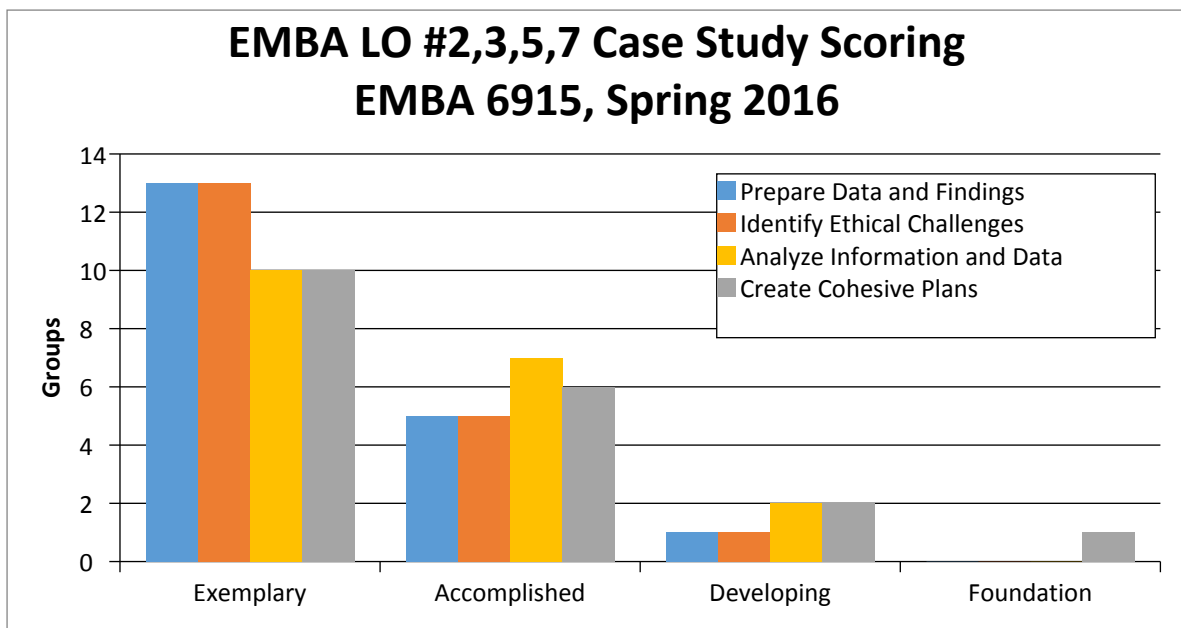
**Evaluator:**

Neil Walshe

**Phase 2: Results Assessment and Planned Action**

**Results:**

	Exemplary	Accomplished	Developing	Foundation	% Students at Exemplary or Accomplished Level
Categories:	4	3	2	1	
Prepare Data and Findings	13	5	1	0	95%
Identify Ethical Challenges	13	5	1	0	95%
Analyze Information and Data	10	7	2	0	89%
Create Cohesive Plans	10	6	2	1	84%





## References and Templates Drawn From:

Arter, J., & McTighe, J. (2001). *Scoring rubrics in the classroom: Using performance criteria for assessing and improving student performance*. Corwin Press.

Stevens, D. D., & Levi, A. J. (2013). *Introduction to rubrics: An assessment tool to save grading time, convey effective feedback, and promote student learning*. Stylus Publishing, LLC.

Suskie, L. (2010). *Assessing student learning: A common sense guide*. John Wiley & Sons.

### **Suggested Action:**

Too many learning outcomes assessed by one assignment. The rubrics do not adequately map to the learning outcomes so the data about student learning is faulty.

The Learning Outcomes have already been revised. Rubrics will be developed for each new learning outcome.

### ***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

#### **Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

## **APPENDIX ONE – CASE STUDY**

### **EMBA 2016 – Ethics - Case Analysis Assignment**

#### **Assignment Rationale:**

Inherent to a study of ethics in organizations is an ability to consume, evaluate, interpret and communicate complex and abstract concepts in accessible terms. As students of ethics you need to be able to distinguish that which is important from that which is inconsequential. Furthermore, it is imperative that you can relay concepts and perspectives clearly and in a concise format to both superiors and organizational peers alike. A necessary step in achieving this is being able to distil and effectively communicate your own perspectives on a given topic within the literature. This assignment encourages you to have a targeted perspective, a developed knowledge, and an ability to communicate within strict boundaries. Above all, recognize that this is primarily an exercise in thinking and *then* in writing.

#### **Assignment Aims:**

1. To assess your depth of knowledge around ethics in the context of the wider organization.
2. To allow an opportunity to demonstrate your critical insight on an actual (or possible) ethical situation.
3. To write a concise, argumentative, and conclusive article for general (rather than purely academic) consumption.

#### **Length:**

- The paper must be a maximum of 600 words and a minimum of 500 words.
- Any references used in the body of the text or in a reference section count towards the word limit.
- The question itself does not count towards the word limit.

**Format:**

- Assignments must be submitted as Word (.doc).
- Files **must** be labelled as follows: (Example)

EMBA– Case Study– Your Name (e.g. EMBA– Case Study - Neil Walshe.doc)

- All files must be single spaced in 12 point font, aligned to the left and with 1 inch margins.

**Deadline:**

- Assignments must be submitted no later than **9pm PST on Sunday the 3<sup>rd</sup> April 2016**
- Assignments should be emailed to me **nwalshe@usfca.edu** with the subject line containing **only** “EMBA” followed by your full name (e.g. **EMBA - Neil Walshe**). Emails will be filtered automatically into a separate folder so please ensure that this format is carefully observed.

**Guidance:**

1. Read the Marking Criteria provided before beginning the exercise.
2. Read the Question. It is worth reading it again.
3. Set aside time to write an initial draft and or outline (a few minutes – 10 max).
4. Pay particular attention to the wording of the question. Be clear as to what the question is actually asking. For example, are you able to distinguish the difference between words like “explain” and “evaluate”, or between “discuss” and “outline”?

5. You do not have to accept the premise of a question. You are in fact encouraged to assess the premise of each question before composing your answer.
6. Write these pieces with the assumption that they will be read by a subject matter expert. Accordingly, do not waste words explaining basic definitions. Assume that your reader will possess a developed knowledge of the topic.
7. Make sure that every word counts and that every word contributes to your argument, discussion, or perspective. Avoid redundancy in your writing. Get straight to the answer and keep to the point you are making.
8. Remember that the aim is to demonstrate your **understanding** of the topic under examination not to provide a crash course in it for the reader. If you choose to only look at one narrow focus of the topic to the exclusion of all else then feel free to do so but ensure that it is focused and that you have a sound rationale for doing so.
9. For the sake of perspective, please be aware that all of the text in this document before this sentence already amounts to 600 words.
10. Write your assignment in the form of prose. Do not use bullet points or contractions. Again, please observe the Marking Criteria supplied.

### **Considerations Prior to Submitting your Assignment:**

- Is the word limit of my piece correct?
- Is the file named correctly and in the requested format?
- Does your piece reflect the aims of the assignment listed in this document?
- Do you provide an answer to the question being asked?

### **Question:**

Central to an understanding ethical behavior is an ability to critically evaluate the inherent benefits and limitations of organizational actions and decisions. Watch the video clips and review the links which detail *some aspects* of the 2010 worldwide Toyota product recall. Central to the issue of safety and brand reputation, Toyota have identified the need to enter into a process of restoring trust,

image and identity between employees, consumers and the public. Using your knowledge to date of ethical behaviour, and your wider knowledge of organizations:

**Q: Was Toyota's behaviour ethical in relation to the 2010 product recall?**

In answering the question above, be aware that the scope of the question is very wide and as such will force you to make a choice on what you examine and the depth to which you do so. Any approach you take must look specifically at what the company did, and in turn, why you feel that was a positive or negative action on their part.

The links suggested below are provided in order to highlight some salient points about the issue at hand – not be give a conclusive picture of the recall. You are free to use other literature, sources and media but bear in mind the space and limits of your report. It would be imprudent to review 30 links/articles since the extent to which you can get a comprehensive picture of the recall across is limited. What is important is communicating the specific aspect you have chosen to focus on.

You are also reminded that:

- A summary or history of the Toyota recall event is not required
- You are not being asked to redesign Toyota's organizational structure.
- Your answer **must** demonstrate that you have critically evaluated the ethical behaviors of Toyota...e.g. not the current reputation of the company

***Some* Resources (feel free to use these and others but ensure that you are looking at data relating to the 2010 recall):**

[http://pressroom.toyota.com/article\\_display.cfm?article\\_id=1844](http://pressroom.toyota.com/article_display.cfm?article_id=1844)

[http://en.wikipedia.org/wiki/2009%E2%80%9311\\_Toyota\\_vehicle\\_recalls](http://en.wikipedia.org/wiki/2009%E2%80%9311_Toyota_vehicle_recalls)

<http://youtu.be/jAz0JqGfi2o>

[http://www.nytimes.com/2009/10/03/business/global/03toyota.html?\\_r=1](http://www.nytimes.com/2009/10/03/business/global/03toyota.html?_r=1)

<http://www.forbes.com/sites/joanmuller/2012/03/08/toyota-hiccup-another-big-recall/>

## **EMBA – Assessment Criteria for Written Work**

In marking written work, particular attention is paid to the following:

1. What you write should be **readable, logical, coherent, and systematic**. Your structure should be clear from the beginning of the piece.
  
2. You should directly address the question set. Define the key terms and set out clearly the main issues. Distinguish the essential from the unessential. If the question has a number of parts, you should give enough weight to each part. Addressing the questions means that you must provide an answer.
  
3. You should make appropriate use of the relevant literature, drawing on theory and research. If the question calls for it, demonstrate the link between theory/research and practice. Simple regurgitation of facts and knowledge will rarely be enough; you should show your **understanding** of the literature relevant to the topic. Both theory and research should be critically evaluated.
  
4. For a good essay, examination or assignment, you should not only demonstrate that you understand the relevant theory and research but that you can use it to develop your own arguments. Accordingly, developing your own perspective is critical to achieving a passing mark.
  
5. Though the content of your essay and the demonstration of independent, critical thinking are what count most of all, the presentation of your essay also is important. Demonstrate regard for the points about essay writing that are set out above. Please remember that word limits are provided to encourage both brevity and clarity of writing. They are not suggestions. They are requirements.
  
6. Always provide an answer to a question.
  
7. Again... Always provide an answer to a question.

### Marking Scale (Narrative Description)

The purpose of this scale is to outline how different approaches to a written assignment correspond to actual marks awarded. Please note that compliance with what follows does not assure receipt of those marks, instead they should be interpreted as the minimum standard accepted.

**<30** The wrong idea completely. Does not answer the question at all.

**30-39** Demonstrates some very limited understanding of the question.

**40-44** Demonstrates some limited understanding of the question and addresses a very small number of relevant issues. Evidence of very limited awareness of the core material, with some reference to relevant literature.

**45-49** Demonstrates a basic grasp of the question and addresses some of the relevant issues. Evidence of a limited awareness of the core material, and referencing of the key literature.

**50-54** Demonstrates a clear understanding of the question and an awareness of the key issues. Evidence of a moderate reading of the core material though with limited breadth or depth of analysis. Lists the key points of the relevant literature but does not critically compare or evaluate them.

**55-59** Demonstrates a good understanding of the question and a moderately good breadth of reference to the relevant literature. Limited in critical evaluation and comparison of the literature considered.

**60-64** Good breadth of material relevant to the question. Some critical evaluation and contrasting of the relevant literature. Some depth of analysis, though lacking in originality or insight.

**65-69** Good breadth and depth of analysis. Demonstrates moderately good ability to critically evaluate and contrast research and argument within the relevant literature. Some originality and insight.

**70-79** Very good breadth and depth of analysis. Demonstrates good ability to critically evaluate and contrast across a broad range of literature, including recent work in this area. Shows some moderately good originality and insight and is clearly and concisely argued and analysed.

**80-89** Excellent breadth and depth of analysis. Demonstrates very good ability to critically evaluate and contrast across a range of literature, including recent work in this area. Shows good originality and insight, and is clearly and concisely argued and analyzed.

**90-100** Excellent breadth and depth of analysis. Very good originality and insight and excellent ability to critically evaluate, contrast, and 'play' with the research and argument contained within a broad range of relevant literature, including recent work in this area. Clearly and concisely argued and analyzed throughout.



**Marks to Grading Scales:**

Below is a scale used to convert marks awarded for written assignments to actual grades.

**A : 85 to 100 marks**

[95–100=A+]

[90–94=A]

[85-89=A-]

**B : 70 to 84 marks**

[80-84=B+]

[75-79=B]

[70-74=B-]

**C : 55 to 69 marks**

[65–69=C+]

[60-64=C]

[55-59=C-]

**D – 40 to 54 marks**

[40–54=D]

**F – 0-39 marks**

[0-39=F]

**[END OF DOCUMENT]**

# EMBA AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

**Learning Outcome assessed:**

**EMBA Learning Outcome 5: Analyze Information and Data**

Analyze and apply information and data to business decisions.

**Assessment Method:**

Course-embedded assignments: LBO case.

**Targeted performance, based on rubrics:**

80% of students exceed expectations

**Evaluation Process:**

Case assignment "Hedging International Business Transaction using FX derivatives".

Create a hedging strategy using derivatives for the US firm's international business transaction of a sale of semi-conductors to a European firm.

Justify the decision to execute this transaction by illustrating how the FX protective put strategy will manage downside risk.

**Rubric:**

Achievement	Poor	Average	Excellent
Use derivatives to manage risk	Unable to use derivatives properly; show inadequate understanding of risk	Use derivatives correctly in most cases; have adequate understanding of risk management implications	Make proper use of derivatives; have clear understanding of use to manage risk

**Course where learning outcome was assessed:**

EMBA 6905 – Managerial Finance

**Evaluator(s):**

Frank Ohara

## ***Phase 2: Results Assessment and Planned Action***

### **Results:**

This cohort did unusually well (100%) in the FX case study.

Excellent performance may have been due to at least one member of each group with work related expertise in area, however, the other students in the groups were able to elevate their performance due to this. Each team had individuals with significant finance work experience.

One student is the Senior Director of Corporate Foreign Exchange at Wells Fargo specializing in giving FX hedging advice to major corporations. Another is a CFO of a global manufacturing firm. Still another student was promoted to CFO in the middle of this course.

### **Suggested Action:**

Although the assessment of team performance was reliable, we did not have reliable data on individual performance. This reflects a weakness in the overall Assurance of Learning process. Going forward, we will incorporate assignments that will reflect individual student learning.

## ***Phase 3: Closing the Loop***

*Needs plan for closing the loop.*

# EMBA AY 2015-2016 Assessment

## Phase 1: Assessment Plan

Learning Outcome assessed:

### EMBA Learning Outcome 6: Formulate Strategic Plans

Formulate well thought out strategic plans and vision for future business decisions.

Assessment Method:

Project Presentation in the EMBA 6913

Targeted performance, based on rubrics:

80% meet expectations

Evaluation Process:

External evaluation of integrative Links simulation group presentation.

Rubric:

**Business Plan Grading Rubric**

Performance Rating

Evaluation Dimensions	Needs Improvement Score 1	Acceptable 2	Exemplary 3
<b>Marketing Plan</b>	Marketing plan is not provided, or is inadequate, imprecise, or incomplete in significant respects; description of important characteristics of the marketing strategy is vague and lacking detail; a sales management plan is not identified or not sufficiently described; a budget for the marketing plan is not provided, or is missing important elements, is unrealistic, and/or is incorrectly prepared	Marketing plan is outlined, but less than fully described; the plan summarizes the marketing strategy, but is missing a few elements; some specifics regarding pricing, promotion, advertising, distribution, media usage, public relations, and web/social media presence are provided, but some details are not described; the plan adequately addresses a sales management plan, and a satisfactory budget is provided	Clearly outlines and describes the marketing plan and an effective overall marketing strategy for the proposed new enterprise; provides details regarding pricing, promotion, advertising, distribution, media usage, public relations, and web/social media presence; fully describes sales management plan and composition of sales force; provides a comprehensive and detailed budget for marketing plan
<b>Operational Plan</b>	Operational plan is not provided, or is inadequate, not fully developed, or incomplete in significant respects; description of important resource needs is vague and lacking detail; a logistics and supply chain plan is not provided or is not sufficiently described	Operational plan is outlined, but less than fully described; the plan summarizes human resource, facility, and technology needs, but is missing a few elements; a logistics and supply chain plan is satisfactorily outlined; a few details are not described, but plan meets expectations	Effectively outlines and develops an operational plan for the proposed new enterprise; the plan clearly identifies needs relating to human resources, facilities, and technology infrastructure; fully describes plan for logistics and supply chain management
<b>Financial Plan</b>	Financial plan is not provided, or is inadequate, unrealistic, or incomplete in significant respects; analyses of and/or projections for key components of the financial plan are inaccurate, not developed, and/or lacking detail; a proposal for alternative financing sources is not provided or is not adequately described and/or substantiated	Plan outlines the principal financial elements, but analysis is limited or missing a few minor components; sales forecasts, income projections, pro-forma financial statements, a break-even analysis, and a capital budget are included, but are less than fully justified; the plan outlines possible sources of financing and is adequate in most respects	Presents an accurate, realistic, and achievable financial plan for the proposed new enterprise; the plan includes reasonable and fully supported sales forecasts and income projections, proforma financial statements, a break-even analysis, and a capital budget; the plan clearly identifies and effectively justifies possible sources of financing

Courses where learning outcome was assessed:

EMBA 6913, Supply Chain Management

**Evaluator:**

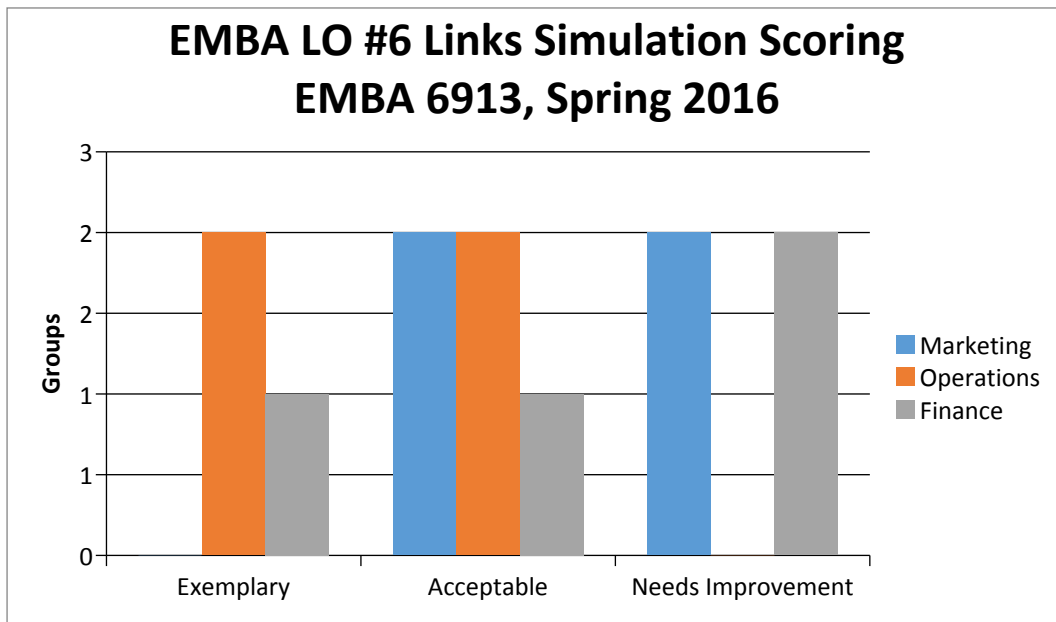
Barry Doyle

**Phase 2: Results Assessment and Planned Action**

**Results:**

**Links Presentation**

	Exemplary	Acceptable	Needs Improvement	% Students at Exemplary or Acceptable Level
Categories:	3	2	1	
Marketing	0	2	2	50%
Operations	2	2	0	100%
Finance	1	1	2	50%



## **Action:**

Group presentation data doesn't tell us anything about individual learning.

The learning outcome has been rewritten to better reflect the revised program goal. The new learning outcome will be assessed in EMBA 6997, Global Business Practicum, in the future. The measure will be an individual writing assignment.

## ***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

### **Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

# EMBA AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **08) Summarize Basic Principles of Business Areas**

Summarize basic principles of all main business areas, including accounting, finance, strategy, management, marketing, supply chain management, and business law.

### **Assessment Method:**

Selected conceptual and quantitative question on progress quiz.

### **Targeted performance, based on rubrics:**

80% meet expectations

### **Evaluation Process:**

Students were given a short answer/essay question progress quiz to assess the accounting portion of this learning outcome. An independent evaluator selected 10 questions off the quiz to assess the learning outcome.

### **Rubric:**

The following rubric was used:

**Unprepared:** Student is unable to articulate clearly the meaning of key business concepts

**Meets:** Student is able to identify and explain key concepts; has some skill in relating concepts to business environment

**Exceeds:** Student is able to identify and explain key concepts, and relate concepts effectively towards the solution of business problems

### **Course where learning outcome was assessed:**

EMBA 6904

### **Evaluator(s):**

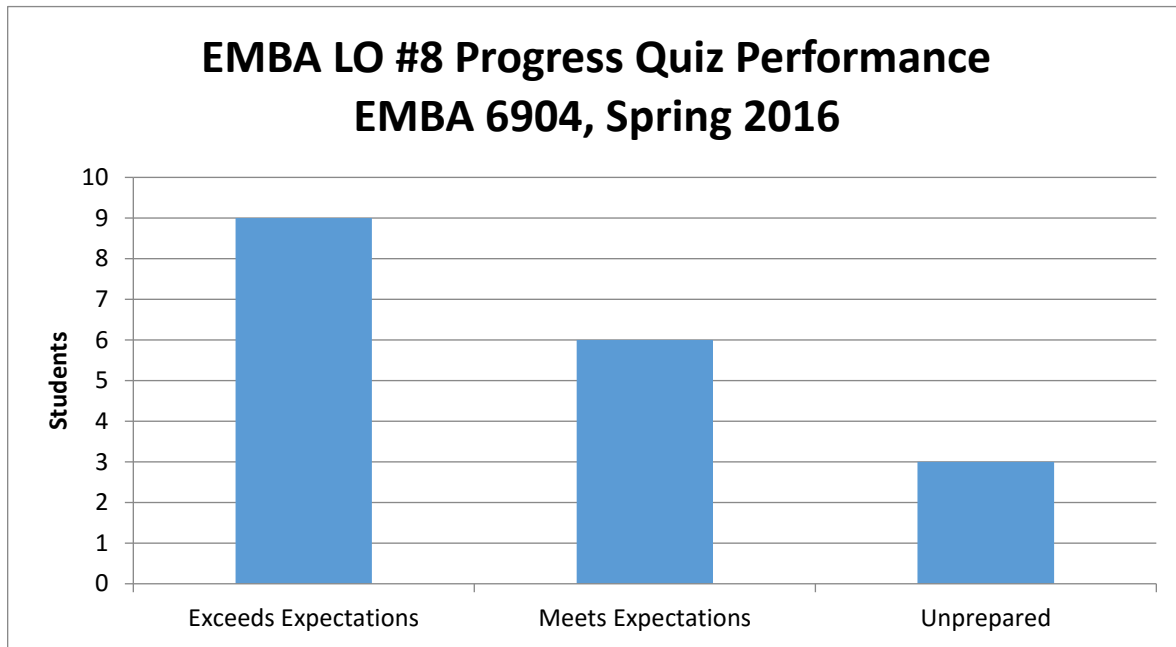
Dr. Tatiana Fedyk

**Phase 2: Results Assessment and Planned Action**

**Results:**

**EMBA 6904 Progress Quiz Pooled Results**

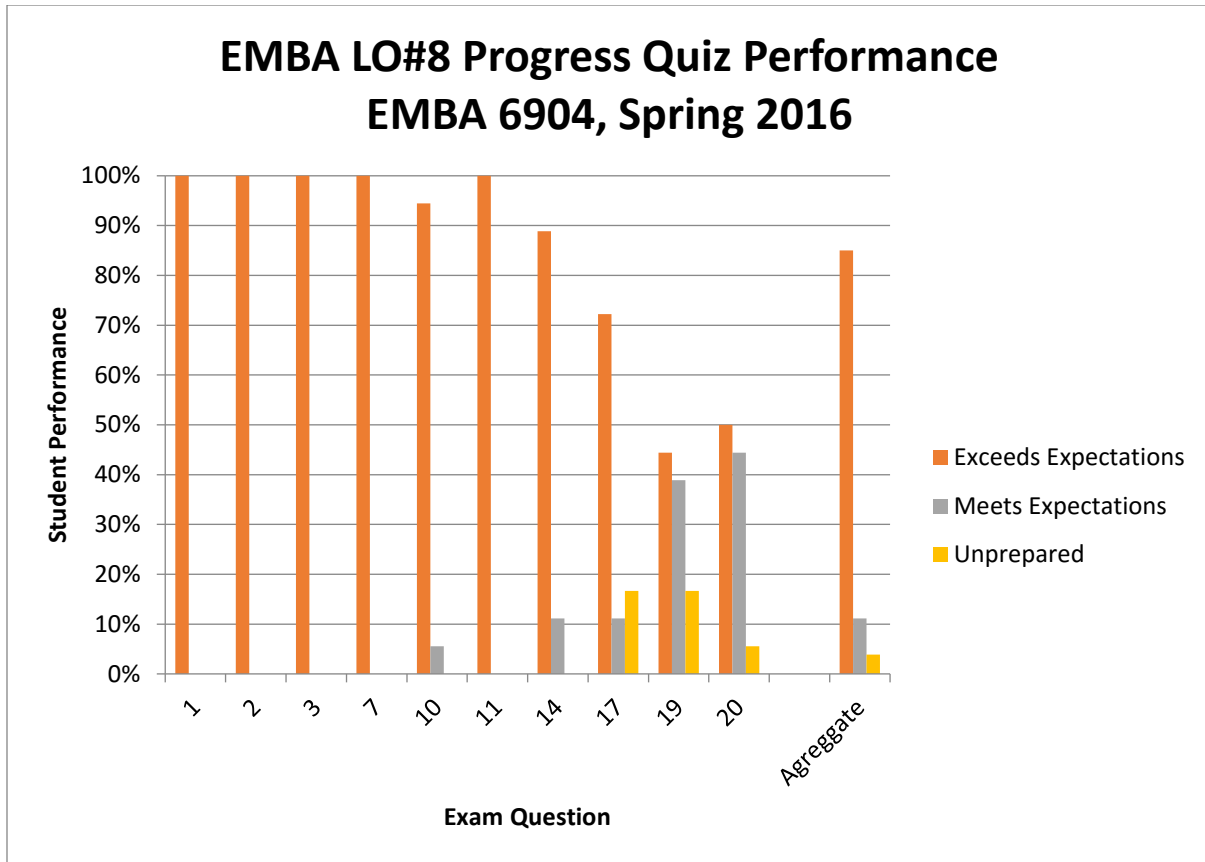
Number of students achieving target	Exceeds Expectations > 90%	Meets Expectations 80% - 90%	Unprepared < 80%	% Students Meeting or Exceeding Expectations
Final Exam	9	6	3	83%



**Results by types of questions: conceptual versus quantitative**

Number of students achieving target	Exceeds Expectations > 90%	Meets Expectations 80% - 90%	Unprepared < 70%	% Students Meeting or Exceeding Expectations
Conceptual Questions	13	5	0	100%
Quantitative Questions	5	6	7	61%





**Action:**

As worded, the learning outcome implies that all concepts will be assessed in a single assessment. This is difficult to do at any given point in the curriculum. The assessment for this report only measured the accounting portion of this learning outcome.

In the next assessment cycle, this learning outcome will be measured by a comprehensive standardized test.

### ***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

#### **Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

## Addendum: EMBA 6904 Progress Quiz Questions

- The four main activities of a business are:
  - A) Goal & Strategy, Obtain financing, Obtain Investments, and Conduct Operations
  - B) Goal & Strategy, Obtain financing, Obtain Goodwill, and Conduct Operations
  - C) Create Financials, Obtain CPA designation, Obtain Investments, and Conduct Music
  - D) Create Financials, Obtain Goodwill, Obtain Investments, and Conduct Operations
  
- Managerial accounting is primarily focused on:
  - A) Providing creditors information on the status of their loans
  - B) Providing investors with useful information for valuing securities
  - C) Providing the Internal Revenue Service with information to determine the amount of taxes owed
  - D) Providing managers with relevant information to help achieve organizational goals
  
- In order to be useful to managers, management accounting reports:
  - A) Should be prepared according to the stated Institute of Management Accounting guidelines
  - B) Should be prepared according to Generally Accepted Accounting Principals
  - C) Should be prepared to meet the specific needs of decision makers
  - D) Should be prepared only by the Finance Dept. of the company.

**For questions 7-9:**

Quick Delivery Services has collected the following information about operating expenditures for its delivery truck fleet for the past five years:

Year	Miles	Operating Costs
2011	110,000	\$390,000
2012	140,000	\$420,000
2013	100,000	\$360,000
2014	130,000	\$410,000
2015	150,000	\$440,000

7. Using the high-low method, what is the cost estimate for variable costs for 2016?

- A) \$1.25
- B) \$2.00
- C) \$1.60
- D) \$1.50

$$\frac{\$440,000 - \$360,000}{150,000 - 100,000} = \frac{\$80,000}{50,000} = \$1.60$$

10. The contribution margin is:

- A) The difference between sales price and total variable cost
- B) The difference between total sales and total cost of goods sold
- C) The difference between total revenue and total variable cost
- D) Total sales minus total cost of goods sold

For questions 11-13: Golden Gate's income statement is as follows:

Sales (10,000 units)	\$120,000
Less variable costs	<u>- 48,000</u>
Contribution margin	\$72,000
Less fixed costs	<u>- 24,000</u>
Net income	<u>\$ 48,000</u>

11. What is the **unit contribution margin**?

- A) \$12.00
- B) \$ 7.20
- C) \$ 4.80
- D) \$ 2.40

$\$72,000 \div 10,000 \text{ units} = \$7.20$

14. **Happy Time's** income statement is as follows:

Sales (10,000 units)	\$80,000
Less variable costs	<u>- 48,000</u>
Contribution margin	\$32,000
Less fixed costs	<u>- 24,000</u>
Net income	\$ 8,000

If sales increase by \$15,000, profits will:

- A) Increase by \$1,000
- B) Increase by \$4,000
- C) Increase by \$6,000
- D) Increase by \$15,000

I like to use the CM ratio ...  $\frac{\$32,000}{\$80,000} = 40\%$   
 CM ↑ \$6,000 = \$15,000 × 40%

17. Which of the following costs are treated as part of the cost of product?

- A) Wages of plant security guards
- B) Insurance on the plant building and equipment
- C) Depreciation on the kitchen sink in the plant cafeteria
- D) All of the above are product costs

19. Geysler Corp. obtained the following information from its accounting records:

Sales	\$36,000	X
Beginning Finished Goods Inventory	\$21,000	
Ending Finished Goods Inventory	\$17,000	
Cost of Goods Sold	\$16,000	

The Cost of Goods **Manufactured** this period equals:

- A) \$16,000
- B) \$18,000
- C) \$12,000
- D) \$23,000

$$\begin{array}{r}
 \$17,000 \\
 + 16,000 \\
 - 21,000 \\
 \hline
 \$12,000
 \end{array}$$

20. The Chat Company manufactures 5,000 telephones per year. The full manufacturing costs per telephone are as follows:

Direct materials	\$ 4
Direct labor	16
Variable manufacturing overhead	12
Fixed manufacturing overhead	10
Total	\$42

$$(\$42 \times 5,000) = \$210,000 \quad \boxed{\text{MAKE}}$$

The Electric Assembly Company has offered to sell Chat 5,000 telephones for \$31 per unit. If Chat accepts the offer, \$20,000 of fixed overhead will be eliminated. Chat should:

- A) Make the telephones; the savings is \$5,000
- B) Buy the telephones; the savings is \$35,000
- C) Buy the telephones; the savings is \$25,000
- D) Make the telephones; the savings is \$25,000

$$\begin{array}{l}
 \boxed{\text{BUY}} \\
 5,000 \times \$31 = \$155,000 \\
 \textcircled{+} \quad \$50,000 - \$20,000 = 30,000 \\
 \hline
 \$185,000 \\
 \text{Savings of } \$25,000
 \end{array}$$

# **MGEM Program**

# MGEM AY 2015-2016 Assessment

## Phase 1: Assessment Plan

### Learning Outcome assessed:

#### **MGEM Learning Outcome 1: Lead and Manage Diverse Individuals**

Demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.

### Assessment Method:

Case Analysis Presentations (Individual/ Team)

### Targeted performance, based on rubrics:

80% Exceeds Expectations

### Evaluation Process:

Students were tested on the basis of the individual portions of team presentations focusing on the assessment of a select company’s challenges (problem identification) and creative solutions and recommendations in the context of the case’s regional ecosystem (all cases came from the MIT case study program on global entrepreneurship and were from all continents—Asia, Europe, the Americas, and Africa). For LO1, student presentations (10-15 min. for each team; approximately 5 min for individuals) were tested on the basis of the assessment rubric and the scoring sheet to analyze their individual ability to lead and function as part of the cross-cultural team by demonstrating their cross-cultural awareness, cohesiveness, and mutual support.

**Rubric:** See Results section.

Rubrics	Accomplished	Proficient	Beginning
1. Students demonstrate motivation, individual leadership within a team, and commitment to the team’s cross-cultural nature during the case analysis presentation.	Displays strong motivation in leading a team to accomplish the project’s tasks and objectives.  Exemplifies clear commitment to and appreciation of cross-cultural nature of the team	Displays mostly consistent motivation in leading a team to accomplish the project’s tasks and objectives.  Exemplifies commitment to and appreciation of cross-cultural nature of the team	Displays weak motivation in leading a team to accomplish the project’s tasks and objectives.  Exemplifies weak commitment to and appreciation of cross-cultural nature of the team

**Course where learning outcome was assessed:**

MGEM 5111 - Emerging Trends in Entrepreneurship and Innovation –Social Entrepreneurship

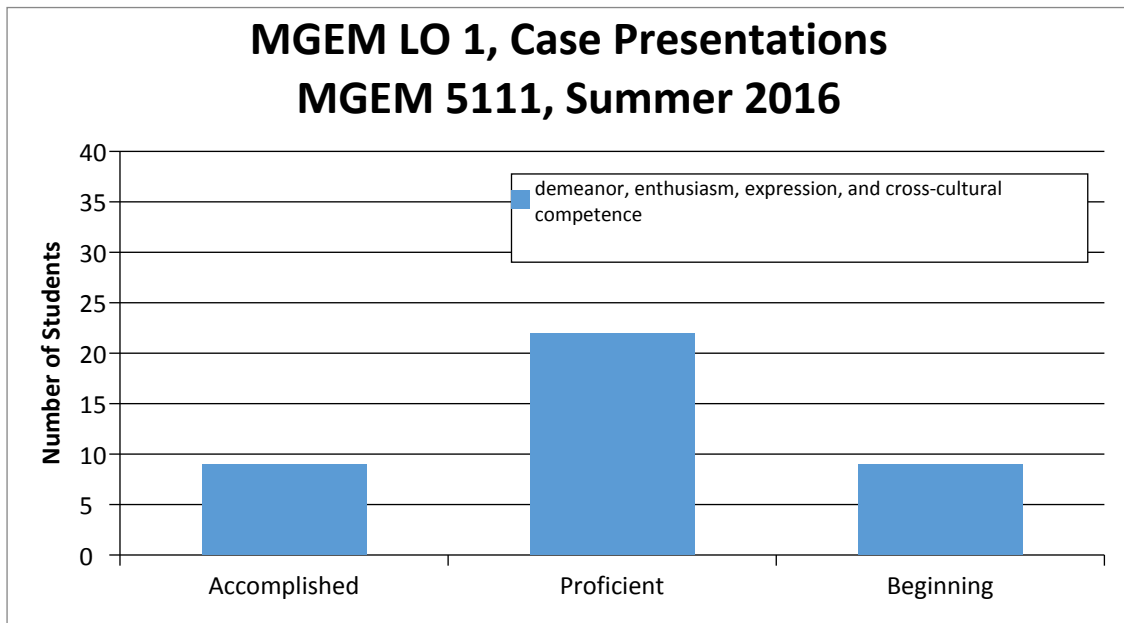
**Evaluator(s):**

Gleb Nikitenko and James Lee

**Phase 2: Results Assessment and Planned Action**

**Results:**

	Accomplished	Proficient	Beginning	% Students at Exemplary or Accomplished Level
Categories:	3	2	1	
Cumulative score on the basis of the presentations' averages of individual scores on demeanor, enthusiasm, expression, and cross-cultural competence (see the scoring rubric). Average total: 2.25	9	22	9	78%





### **Suggested Action:**

Students have reached neither the goal of 80% target of exceeding expectations nor the 80% threshold of meeting or exceeding expectations (77.5%). Students came across as generally competent and sensitive to cultural differences, and good individual leadership functioning as a member (and in specific cases a leader) of a cross-cultural and cross-functional team.

Faculty have found that the SLO needs to be revised and a more detailed and relevant rubric to be developed. A cross-cultural competence inventory is to be identified and adopted for this SLO for program-assessment purposes (pre- and post- test) going forward. This SLO will be assessed again in the FY 16-17.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

# MGEM AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **MGEM Learning Outcome 1: Lead and Manage Diverse Individuals**

Demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.

### **Assessment Method:**

Final Project Presentations in the IQS Consulting Projects (Pre-Test) and US Consulting Course (Post-Test)

### **Targeted performance, based on rubrics:**

80% Exceeds Expectations

### **Evaluation Process:**

Students were tested on the basis of the individual portions of team presentations focusing on the assessment of a select company's challenges (problem identification) and creative solutions. For LO1, student presentations (10-15 min. for each team; approximately 5 min for individuals) were tested on the basis of the assessment rubric and the scoring sheet to analyze their individual ability to lead and function as part of the cross-cultural team by demonstrating their cross-cultural awareness, cohesiveness, and mutual support.

The method of pre- and post-testing was used to gauge a change in the average scores and ranges of individual student performance during the program between the first and last semesters. In the 3-semester program, no additional statistical power beyond average cumulative % score change was estimated.

**Rubric:**

Rubrics	Accomplished	Proficient	Beginning
1. Students demonstrate motivation, individual leadership within a team, and commitment to the team’s cross-cultural nature during the consulting project presentation.	<p>Displays strong motivation in leading a team to accomplish the project’s tasks and objectives.</p> <p>Exemplifies clear commitment to and appreciation of cross-cultural nature of the team; greatly contributes to the team’s cohesiveness.</p>	<p>Displays mostly consistent motivation in leading a team to accomplish the project’s tasks and objectives.</p> <p>Exemplifies commitment to and appreciation of cross-cultural nature of the team; contributes to the team’s cohesiveness.</p>	<p>Displays weak motivation in leading a team to accomplish the project’s tasks and objectives.</p> <p>Exemplifies weak commitment to and appreciation of cross-cultural nature of the team; minimally contributes to the team’s cohesiveness.</p>

**Course where learning outcome was assessed:**

MGEM 5114 – IQS Consulting Project

MGEM 5115—USF Consulting Course

**Evaluator(s):**

Pre-test: James Lee; Gleb Nikitenko; Gerard Martorell (IQS Consulting);  
 Post-test: James Lee, Gleb Nikitenko and six (7) consulting clients (company representatives) of USF who are entrepreneurs and business leaders in the variety of tech and non-tech industries: Grazyna Stepanyak, Chris Chang, Yulin Xu, Natalya Romanenko, Ronald Batiste, Danielle Zacarias, Camilla Lombard.

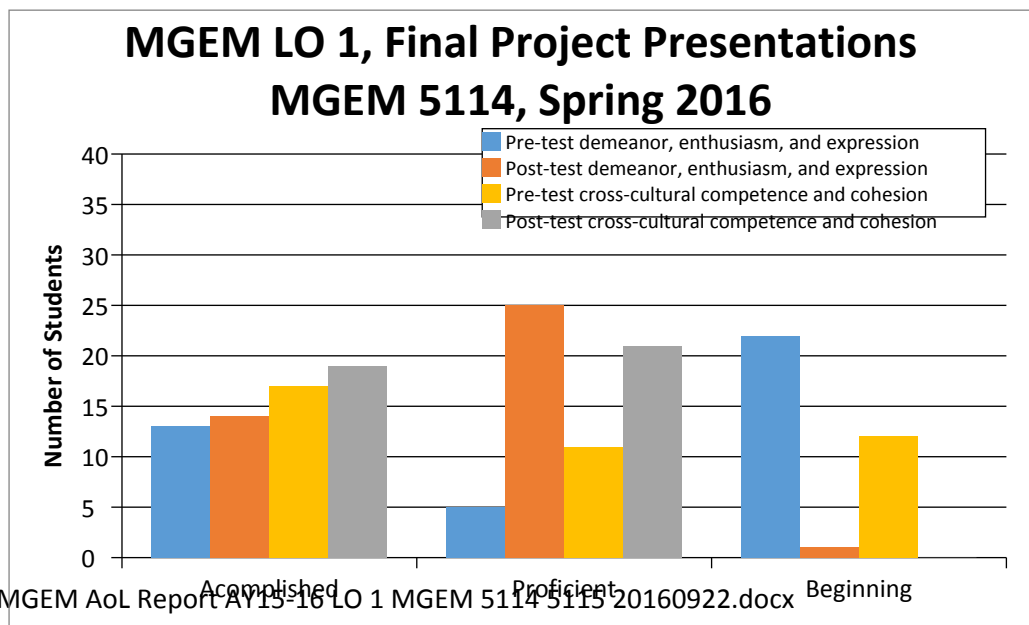
**Phase 2: Results Assessment and Planned Action**

Categories:	Accomplished 3	Proficient 2	Beginning 1	% Students at Exemplary or Accomplished Level
Pre-test cumulative score on the basis of the presentation's average of individual scores on demeanor, enthusiasm, and expression (see the scoring rubric). Average total: 1.58	13	5	22	45%
Post-test cumulative score on the basis of the presentation's average of individual scores on demeanor, enthusiasm, and expression (see the scoring rubric). Average total: 2.64	14	25	1	98%
Pre-test cumulative score on the basis of the presentation's average of cross-cultural competence and cohesion (see the scoring rubric). Average total: 1.83	17	11	12	70%
Post-test cumulative score on the basis of the presentation's average of cross-cultural competence and cohesion (see the scoring rubric). Average total: 2.86	19	21	0	100%

Note: 7 of the 40 (17.5%) (included in this category of the Beginning) scored 0--their performance did not meet ANY criteria per the rubric.

Note: 5 of the 40 (12.5%) (included in this category of the Beginning) scored 0--their performance did not meet ANY criteria per the rubric.

Cumulative average: 2.23



## **Suggested Action:**

**Discussion:** In neither of the tests, students have reached the 80% target of exceeding expectations. Students have only been able to reach the mark of 80% meeting and exceeding expectations (97.5% and 100% respectively). Overall, students have demonstrated a significant improvement over the course of the program (67.1%) overall on the SLO #1. Although no formal pre- post- tests were conducted, the correlational analysis revealed a 0.597 co-efficient between the two pre- and post-cumulative scores, which indicates statistical significance and power. Despite some administrative difficulties of having the same evaluators during pre- and post- phases and using the exact same type of cases, the variability aspects of the test are still applicable and could be used to conclude that there was an overall impact of the program on the students' cross-cultural competence and team leadership within their teams. Students came across as far more competent, sensitive to cultural differences, and yet assertive in their presentations, task management, and overall conclusions.

Faculty have found that the SLO needs to be revised and a more detailed and relevant rubric to be developed and used more consistently by reviewers (faculty) and their clients. The inter-rater reliability (pre- and post-) also needs to be better accounted for. However, there is still a medium-strong positive relationship between the program's impact and the student's growth/improvement in developing cross-cultural competence and team functionality/ cohesiveness during the program.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

# MGEM AY 2015-2016 Assessment

## Phase 1: Assessment Plan

### Learning Outcomes assessed:

#### **MGEM Learning Outcome 2: Identify the Ethical and Professional Responsibilities**

Students in the Master in Global Entrepreneurial Management will be able to identify the ethical and professional responsibilities of a global entrepreneur.

### Assessment Method:

Embedded questions in two exams.

### Targeted performance, based on rubrics:

80% meet expectations

### Evaluation Process:

The measurement method consists of embedding questions in the two partial exams of the course, related to several Harvard Business School cases:

- Staples: A Year in the Life of a Start-Up, by Myra M. Hart (case number 9-800-241)
- American Well: The Doctor Will E-See You Now, by Elie Ofek and Ron Laufer (case number 9-510-061)
- Orange: Read & Go, by Thomas Eisenmann et al. (case number 9-809-122)
- Zipcar: Refining the Business Model, by Myra Hart et al. (case number 9-803-096)
- Launching Telmore (A, B, and C), by Ramon Casadesus-Masanell et al. (cases number 9-708-414, 9-708-415, and 9-708-416).

### Rubric:

	<b>Poor achievement (1)</b>	<b>Average achievement (2)</b>	<b>Excellent achievement (3)</b>
<b>Performance</b>	Only able to understand the concept of business models	In addition, able to analyze a firm using a given approach as a template	Able to achieve 1) and 2), and also to design a business model from scratch.

### Courses where learning outcome was assessed:

MGEM 5104, Cross Cultural Management and Business Ethics Practice (ISQ)

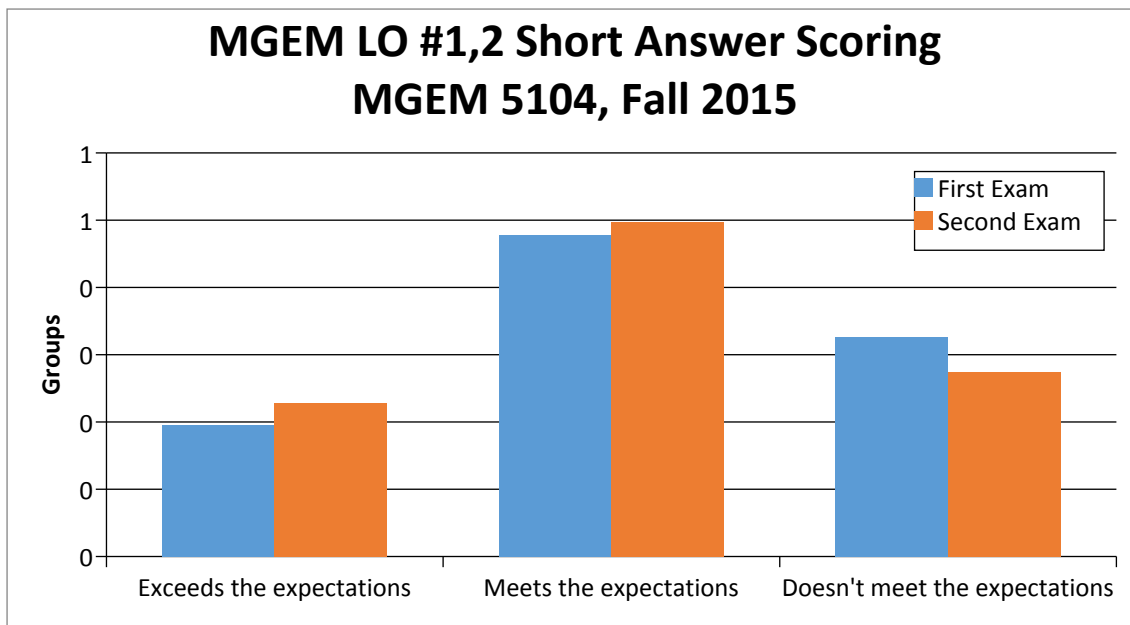
### Evaluator:

Dr. José Sols & Prof. Jean-Philippe Charles

**Phase 2: Results Assessment and Planned Action**

**Results:**

	Exceeds the expectations	Meets the expectations	Doesn't meet the expectations	% Students at Exemplary or Accomplished Level
Categories:	3	2	1	
First Exam	20%	48%	33%	67%
Second Exam	23%	50%	28%	73%



## **What did we learn?**

Following the proposed changes in the assessment of the edition of 2014-2015, the learning outcome has been assessed using the two partial exams of the course. In both exams some questions were specifically designed to assess the students' level of achievement. Students with a level of achievement = 1 in the first exam received additional support to better score in the second exam.

### **Action:**

Additional support to better score in the second exam will be provided not only to students with a level of achievement = 1 in the first exam, but also to those with a level of achievement = 2.

## ***Phase 3: Closing the Loop***

*To be filed the year after the results assessment.*

### **Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment



## Addendum: Exercises used in evaluation

Master in Global Entrepreneurial Management (MGEM)  
IQS School of Management, Ramon Llull University  
Course: Cross-Cultural Management and Business Ethics Practice  
Dr. José Sols & Prof. Jean-Philippe Charles  
Year: 2015-2016

### Assessment Exercise 1 Questions about the Tata Group Case

Please, answer these questions. We will share some of the answers in class, and at the end you will give the document to the teacher. (If you wish, you may answer the questions in Word format document and send it by e-mail to: [jose.sols@iqs.edu](mailto:jose.sols@iqs.edu)).

1. Do you think human business (that is, business and humanism) is possible? What is your personal experience about it? What examples could you give?
2. What do the expressions *doing good* and *doing well* mean? Realize that there are four possibilities: 1/ Doing badly evil things; 2/ doing well evil things; 3/ doing well good things, and 4/ doing badly good things. Could you give an example for each?
3. The Tata Group is a nationalistic group in India. In your opinion, what is more important: the national/local good or the universal good? Can the national solidarity forget the global solidarity?
4. What does this sentence mean (page 249)? “The concept [of what it has just said] recognizes human beings as a part of nature and holds that values —be these religious, ethical, social, or political— have their source in human nature, experience, ethical, social, and culture”.
5. What do you think about each of the six core values upheld by AHP (American Psychological Association) (page 250)?
6. Which are the Tata Group’s ethical ideals?
7. Is it possible to *restructure* (that is, firing employees) in a humane way? How did Tata Group do it?
8. The Tata’s Nano plant moved from West Bengal to Gujarat after important labor troubles. In terms of ethics (not in terms of laws), in which conditions do you think that moving an industry from a region to another one, or from a country to another one, is justified? In which conditions do you think it is unjustified?
9. What would you say about what Manik Patra told his neighbor, Tushar (page 262)?
10. What do you think about the paragraph that begins with this sentence (page 263)? “The Tata case shows that a firm combining humanism with business growth will be sustainable in the long run”.

**Master in Global Entrepreneurial Management (MGEM)**  
**IQS School of Management, Ramon Llull University**  
**Course: Cross-Cultural Management and Business Ethics Practice**  
**Dr. José Sols & Prof. Jean-Philippe Charles**  
**Year: 2015-2016**

## **Assessment Exercise 2**

### **Questions about the Small Chinese Private Firm Case**

Some of these questions are just voluntary:

1. Is being big essential to be successful in business? Why?
2. *[Voluntary question:]* What changes did Mr Li Haitao introduce in Hongfei Metal Ltd. to improve employees' welfare?
3. Do you think it is a good idea to try to improve the employees' quality of life in a firm?
4. When a firm has troubles, is it a good idea to make employees be concerned?
5. *[Voluntary question:]* How did the combination local-global business work in Hongfei Metal Ltd.?
6. *[Voluntary question:]* How did the combination East-West (that is, Chinese-American) business work in Hongfei Metal Ltd.?
7. Why was Mr Li Haitao well respected by his workers?
8. What does democracy in management mean?
9. *[Voluntary question:]* Do you know Confucian humanism? Could you explain it?
10. *[Voluntary question:]* Could you explain the concept of collectivism in management?

# MGEM AY 2015-2016 Assessment

## Phase 1: Assessment Plan

Learning Outcome assessed:

### MGEM Learning Outcome 2: Identify the Ethical and Professional Responsibilities

Identify the ethical and professional responsibilities of a global entrepreneur.

Assessment Method:

Case Analysis Presentations (Individual/ Team)

Targeted performance, based on rubrics:

80% Exceeds Expectations

Evaluation Process:

Students were tested on the basis of the individual portions of team presentations; the focus was on the assessment of a select company’s challenges (problem identification) and creative solutions and recommendations in the context of the case’s regional ecosystem (all cases came from the MIT case study program on global entrepreneurship and were from all continents—Asia, Europe, the Americas, and Africa). For LO2, student presentations (10-15 min. for each team; approximately 5 min for individuals) were assessed on the basis of the rubric and the scoring sheet to analyze their individual ability to conduct a proficient Q&A session elaborating on the case issues, analysis and conclusions while maintaining professional demeanor and exhibiting a consistent knowledge of the case materials (general competence).

Rubric:

Rubrics	Accomplished	Proficient	Beginning
1. Students exhibit professionalism as evidenced by preparedness, demeanor, and knowledge of issues during a robust quality discussion in the Q&A portion of the consulting project presentation.	Exhibits always consistent professionalism as evidenced by preparedness, demeanor, and knowledge of issues during a robust quality discussion in the Q&A portion of the consulting project presentations	Displays mostly consistent professionalism as evidenced by preparedness, demeanor, and knowledge of issues during a robust quality discussion in the Q&A portion of the consulting project presentations	Displays inconsistent professionalism as evidenced by preparedness, demeanor, and knowledge of issues during a robust quality discussion in the Q&A portion of the consulting project presentations; dodges questions and/or mostly withdrawn from the discussion.

**Course where learning outcome was assessed:**

MGEM 5111- Emerging Trends in Entrepreneurship and Innovation- Social Entrepreneurship

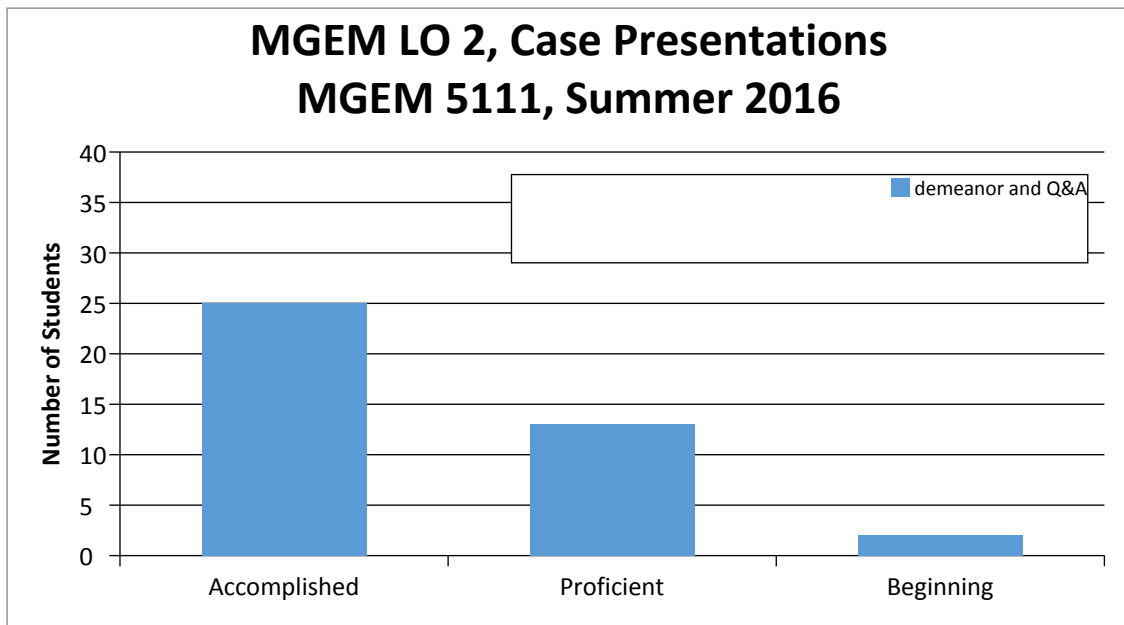
**Evaluator(s):**

Gleb Nikitenko and James Lee

**Phase 2: Results Assessment and Planned Action**

**Results:**

	Accomplished	Proficient	Beginning	% Students at Exemplary or Accomplished Level
Categories:	3	2	1	
Cumulative score on the basis of the presentations' averages of individual scores on demeanor and Q&A (see the scoring rubric). Average score: 2.68	25	13	2	95%



### **Suggested Action:**

Students have not reached the goal of 80% target of exceeding expectations but have reached the 80% threshold of meeting or exceeding expectations (95%). Students displayed consistently high or proficient level of professional demeanor and knowledge of the case materials while responding during a Q&A session of the case analysis presentation assessed individually.

Faculty have found that the SLO needs to be revised and a more detailed and relevant rubric to be developed. Both ethical and professional characteristics should be further defined for SLO assessment and curricular purposes. This SLO will be assessed again in the FY 16-17.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

# MGEM AY 2015-2016 Assessment

## Phase 1: Assessment Plan

### Learning Outcome assessed:

#### **MGEM Learning Outcome 2: Identify the Ethical and Professional Responsibilities**

identify the ethical and professional responsibilities of a global entrepreneur.

### Assessment Method:

Final Project Presentations

### Targeted performance, based on rubrics:

80% Exceeds Expectations

### Evaluation Process:

Students were tested on the basis of the individual portions of team presentations focusing on the assessment of a select company’s challenges (problem identification) and creative solutions. For LO2, student presentations (10-15 min. for each team; approximately 5 min for individuals) were tested on the basis of the assessment rubric and the scoring sheet to analyze their individual demeanor and ability to handle the Q&A portion of the presentation when a variety of questions were asked of every member of the team challenging them to defend their positions in respective portions of the presentation to explain their notions and facts in the context of a variety of managerial situations in the global setting and handle the session professionally. The Q&A portion was rated on the basis of the same scoring sheet used for the SLO #1 and #3.

**Rubric:** See Results section.

Rubrics	Accomplished	Proficient	Beginning
1. Students exhibit professionalism as evidenced by preparedness, demeanor, and knowledge of issues during a robust quality discussion in the Q&A portion of the consulting project presentation.	Exhibits always consistent professionalism as evidenced by preparedness, demeanor, and knowledge of issues during a robust quality discussion in the Q&A portion of the consulting project presentations	Displays mostly consistent professionalism as evidenced by preparedness, demeanor, and knowledge of issues during a robust quality discussion in the Q&A portion of the consulting project presentations	Displays inconsistent professionalism as evidenced by preparedness, demeanor, and knowledge of issues during a robust quality discussion in the Q&A portion of the consulting project presentations; dodges questions and/or mostly withdrawn from the discussion.

**Course where learning outcome was assessed:**

MGEM 5115 - USF. Consulting Course

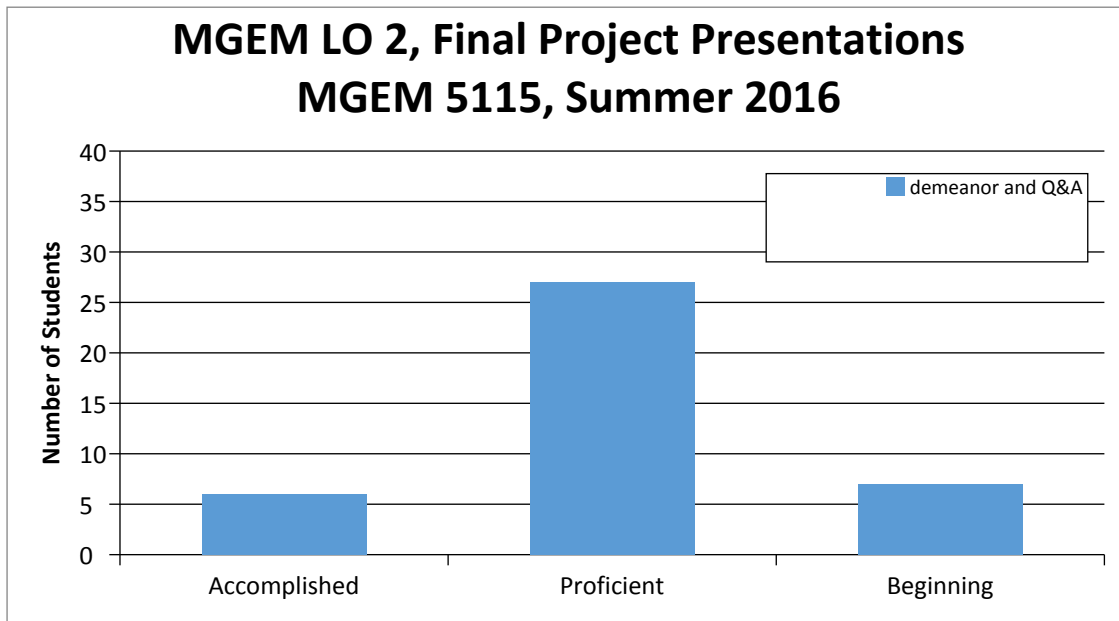
**Evaluator(s):**

Gleb Nikitenko and James Lee

**Phase 2: Results Assessment and Planned Action**

**Results:**

Categories:	Accomplished 3	Proficient 2	Beginning 1	% Students at Exemplary or Accomplished Level
Cumulative score on the basis of the presentations' averages of individual scores on demeanor and Q&A (see the scoring rubric). Average score: 2.44	6	27	7	83%



### **Suggested Action:**

Students have not reached the goal of 80% target of exceeding expectations but have reached the 80% threshold of meeting or exceeding expectations (82.5%). Students displayed generally a good level of professional demeanor and knowledge of the case materials while handling a Q&A session of the case analysis presentations assessed individually.

Faculty have found that the SLO needs to be revised and a more detailed and relevant rubric to be developed. Both ethical and professional characteristics should be further defined for SLO assessment and curricular purposes. This SLO will be assessed again in the FY 16-17.

### ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.



# MGEM AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **MGEM Learning Outcome 3: Effective Communication**

Communicate effectively both verbal and in writing, using different media

### **Assessment Method:**

Final Project Presentations in the IQS Consulting Projects (Pre-Test) and US Consulting Course (Post-Test)

### **Targeted performance, based on rubrics:**

80% Exceeds Expectations

### **Evaluation Process:**

Students were tested on the basis of the individual portions of team presentations; the focus was on the assessment of a select company's challenges (problem identification) and creative solutions and recommendations in the context of the case's regional ecosystem (all cases came from the MIT case study program on global entrepreneurship and were from all continents—Asia, Europe, the Americas, and Africa). For LO2, student presentations (10-15 min. for each team; approximately 5 min for individuals) were assessed on the basis of the rubric and the scoring sheet to analyze their individual ability to conduct a proficient Q&A session elaborating on the case issues, analysis and conclusions while maintaining professional demeanor and exhibiting a consistent knowledge of the case materials (general competence).

The method of pre- and post-testing was used to gauge a change in the average scores and ranges of individual student performance during the program between the first and last semesters. In the 3-semester program, no additional statistical power beyond average cumulative % score change was estimated.

**Rubric:**

Rubrics	Accomplished	Proficient	Beginning
1. Students demonstrate effective verbal presentation skills, including articulation, eye contact, expression/ gestures, and effective and creative visual aids	<p>Presents in a consistently articulate, focused, and effective manner, demonstrating very good eye contact and appropriate expression/ gesturing</p> <p>Demonstrates very well-designed and visually attractive slides and presentation handouts.</p>	<p>Presents in a mostly articulate, focused, and effective manner, demonstrating good eye contact and appropriate expression/ gesturing</p> <p>Demonstrates mostly well-designed and visually attractive slides and presentation handouts.</p>	<p>Demonstrates only occasional articulation, focus, and effective manner of presenting (verbal communication) with inconsistent eye contact and expression/ gesturing</p> <p>Demonstrates adequately designed and visually unattractive slides and presentation handouts.</p>

**Course where learning outcome was assessed:**

MGEM 5114 – IQS Consulting Project

MGEM 5115—USF Consulting Course

**Evaluator(s):**

Pre-test: James Lee; Gleb Nikitenko; Gerard Martorell (IQS Consulting);

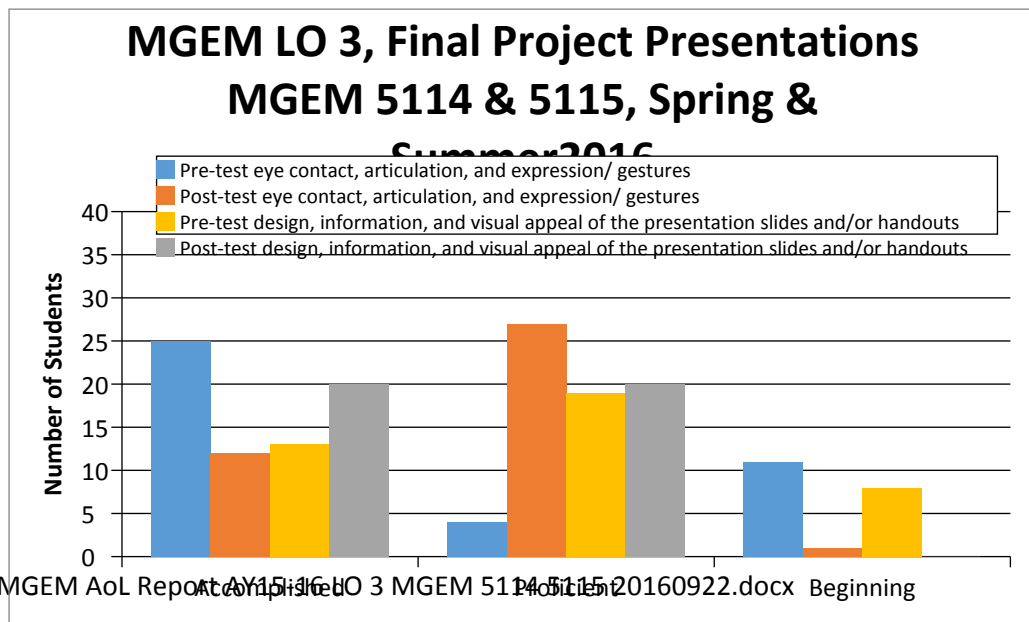
Post-test: James Lee, Gleb Nikitenko and six (7) consulting clients (company representatives) of USF who are entrepreneurs and business leaders in the variety of tech and non-tech industries: Grazyna Stepanyak, Chris Chang, Yulin Xu, Natalya Romanenko, Ronald Batiste, Danielle Zacarias, Camilla Lombard.

**Phase 2: Results Assessment and Planned Action**

Categories:	Accomplished	Proficient	Beginning	% Students at Exemplary or Accomplished Level
Pre-test cumulative score on the basis of the presentation's average of individual scores on eye contact, articulation, and expression/ gestures (see the scoring rubric). Average total: 2.23	3	2	1	
Pre-test cumulative score on the basis of the presentation's average of individual scores on eye contact, articulation, and expression/ gestures (see the scoring rubric). Average total: 2.23	25	4	11	73%
Post-test cumulative score on the basis of the presentation's average of individual scores on eye contact, articulation, and expression/ gestures (see the scoring rubric). Average total: 2.65	12	27	1	98%
Pre-test cumulative score on the basis of the presentation's average of the design, information, and visual appeal of the presentation slides and/or handouts (see the scoring rubric). Average total: 2.13	13	19	8	80%
Post-test cumulative score on the basis of the presentation's average of the design, information, and visual appeal of the presentation slides and/or handouts (see the scoring rubric). Average total: 2.76	20	20	0	100%

Note: 5 of the 40 (12.5%) (Included in this category of the Beginning) scored 0--their performance did not meet ANY criteria per the rubric.

Cumulative average: 2.44



## **Suggested Action:**

In none of the tests, students have reached the 80% target of exceeding expectations. Students have only been able to reach the mark of 80% meeting and exceeding expectations for the post-test for the verbal communication (97.5%) and pre- (80%) and post (100%)- tests for the non-verbal and written communication (visual design, information, and appeal of presentation slides and handouts). On the pre-test for verbal communication, students have not been able to reach the 80% threshold for meeting and exceeding expectations. Overall, students have demonstrated a statistically significant improvement over the course of the program (19.3%) overall on the SLO #3. Although no formal pre- post- statistical analyses were conducted, the basic correlational analysis revealed a 0.57 co-efficient between the two pre- and post- cumulative scores for verbal communication and .562 for written (visual aids) communication, that both reflect statistical significance and power. Despite some administrative difficulties of having the same evaluators during pre- and post- phases and using the exact same type of cases, the variability aspects of the test are still applicable and could be used to conclude that there was an overall positive and statistically significant impact of the program on the students' verbal and non-verbal, including written, communication skills' development. Students have demonstrated significantly stronger verbal and more pronounced non-verbal (written) communication skills while delivering final presentations.

Despite the overall satisfaction with results, faculty have found that the SLO may need to be slightly revised to focus on the specific communication skill sets and outcomes rather than a generic statement; a more detailed and relevant rubric to be developed and used more consistently by reviewers (faculty) and their clients. The inter-rater reliability (pre- and post-) also needs to be better accounted for. However, there is still a medium-strong positive relationship between the program's impact and the student's growth/improvement in verbal and written communication skills in different media.

## ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

# MGEM AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### **Learning Outcome assessed:**

#### **MGEM Learning Outcome 3: Effective Communication**

Communicate effectively both verbal and in writing, using different media

### **Assessment Method:**

Final Project Presentations in the IQS Consulting Projects (Pre-Test) and US Consulting Course (Post-Test)

### **Targeted performance, based on rubrics:**

80% Exceeds Expectations

### **Evaluation Process:**

Students were tested on the basis of the individual portions of team presentations; the focus was on the assessment of a select company's challenges (problem identification) and creative solutions and recommendations in the context of the case's regional ecosystem (all cases came from the MIT case study program on global entrepreneurship and were from all continents—Asia, Europe, the Americas, and Africa). For LO2, student presentations (10-15 min. for each team; approximately 5 min for individuals) were assessed on the basis of the rubric and the scoring sheet to analyze their individual ability to conduct a proficient Q&A session elaborating on the case issues, analysis and conclusions while maintaining professional demeanor and exhibiting a consistent knowledge of the case materials (general competence).

The method of pre- and post-testing was used to gauge a change in the average scores and ranges of individual student performance during the program between the first and last semesters. In the 3-semester program, no additional statistical power beyond average cumulative % score change was estimated.

**Rubric:**

Rubrics	Accomplished	Proficient	Beginning
1. Students demonstrate effective verbal presentation skills, including articulation, eye contact, expression/ gestures, and effective and creative visual aids	<p>Presents in a consistently articulate, focused, and effective manner, demonstrating very good eye contact and appropriate expression/ gesturing</p> <p>Demonstrates very well-designed and visually attractive slides and presentation handouts.</p>	<p>Presents in a mostly articulate, focused, and effective manner, demonstrating good eye contact and appropriate expression/ gesturing</p> <p>Demonstrates mostly well-designed and visually attractive slides and presentation handouts.</p>	<p>Demonstrates only occasional articulation, focus, and effective manner of presenting (verbal communication) with inconsistent eye contact and expression/ gesturing</p> <p>Demonstrates adequately designed and visually unattractive slides and presentation handouts.</p>

**Course where learning outcome was assessed:**

MGEM 5114 – IQS Consulting Project

MGEM 5115—USF Consulting Course

**Evaluator(s):**

Pre-test: James Lee; Gleb Nikitenko; Gerard Martorell (IQS Consulting);

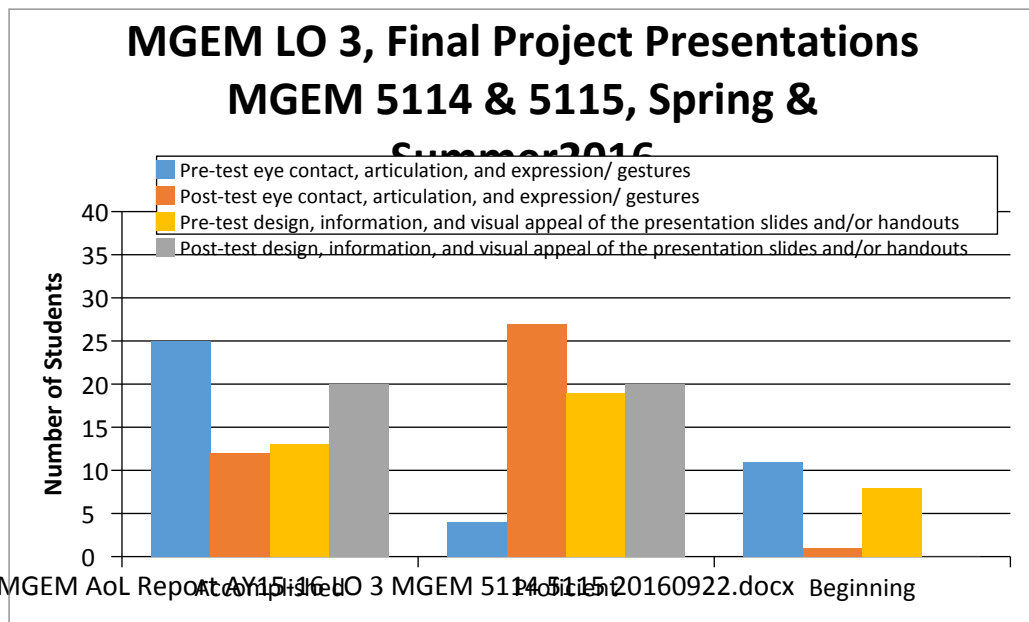
Post-test: James Lee, Gleb Nikitenko and six (7) consulting clients (company representatives) of USF who are entrepreneurs and business leaders in the variety of tech and non-tech industries: Grazyna Stepanyak, Chris Chang, Yulin Xu, Natalya Romanenko, Ronald Batiste, Danielle Zacarias, Camilla Lombard.

**Phase 2: Results Assessment and Planned Action**

	Accomplished	Proficient	Beginning	% Students at Exemplary or Accomplished Level
Categories:	3	2	1	
Pre-test cumulative score on the basis of the presentation's average of individual scores on eye contact, articulation, and expression/ gestures (see the scoring rubric). Average total: 2.23	25	4	11	73%
Post-test cumulative score on the basis of the presentation's average of individual scores on eye contact, articulation, and expression/ gestures (see the scoring rubric). Average total: 2.65	12	27	1	98%
Pre-test cumulative score on the basis of the presentation's average of the design, information, and visual appeal of the presentation slides and/or handouts (see the scoring rubric). Average total: 2.13	13	19	8	80%
Post-test cumulative score on the basis of the presentation's average of the design, information, and visual appeal of the presentation slides and/or handouts (see the scoring rubric). Average total: 2.76	20	20	0	100%

Note: 5 of the 40 (12.5%) (Included in this category of the Beginning) scored 0--their performance did not meet ANY criteria per the rubric.

Cumulative average: 2.44



## **Suggested Action:**

In none of the tests, students have reached the 80% target of exceeding expectations. Students have only been able to reach the mark of 80% meeting and exceeding expectations for the post-test for the verbal communication (97.5%) and pre- (80%) and post (100%)- tests for the non-verbal and written communication (visual design, information, and appeal of presentation slides and handouts). On the pre-test for verbal communication, students have not been able to reach the 80% threshold for meeting and exceeding expectations. Overall, students have demonstrated a statistically significant improvement over the course of the program (19.3%) overall on the SLO #3. Although no formal pre- post- statistical analyses were conducted, the basic correlational analysis revealed a 0.57 co-efficient between the two pre- and post- cumulative scores for verbal communication and .562 for written (visual aids) communication, that both reflect statistical significance and power. Despite some administrative difficulties of having the same evaluators during pre- and post- phases and using the exact same type of cases, the variability aspects of the test are still applicable and could be used to conclude that there was an overall positive and statistically significant impact of the program on the students' verbal and non-verbal, including written, communication skills' development. Students have demonstrated significantly stronger verbal and more pronounced non-verbal (written) communication skills while delivering final presentations.

Despite the overall satisfaction with results, faculty have found that the SLO may need to be slightly revised to focus on the specific communication skill sets and outcomes rather than a generic statement; a more detailed and relevant rubric to be developed and used more consistently by reviewers (faculty) and their clients. The inter-rater reliability (pre- and post-) also needs to be better accounted for. However, there is still a medium-strong positive relationship between the program's impact and the student's growth/improvement in verbal and written communication skills in different media.

## ***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.



# MGEM AY 2015-2016 Assessment

## ***Phase 1: Assessment Plan***

### **Learning Outcome assessed:**

#### **MGEM Learning Outcome 4: Demonstrate and Apply Knowledge**

Demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions.

### **Assessment Method:**

Case Studies

### **Targeted performance, based on rubrics:**

80% Meet or Exceed Expectations

### **Evaluation Process:**

The case write-up was a 4-7 page paper including an executive summary, problem analysis, option discussion, recommendation and implementation. Students submitted the cases on-line using the Canvas system. Each student submitted two cases and were graded based on their performance on each section of the case.

Two cases were selected in order to evaluate student performance on the learning objective. The two cases selected *were Experience China: A National Image Campaign in the USA* and *ICA: Changing the Supermarket Business*. Students completed the case study after learning about the SELECT aspect of marketing (Socio-cultural, economic, legal, environmental, competitive, and technology).

For each case, two professors evaluated the performance of the students with regards to demonstrating and applying knowledge from a global perspective including cultural, economic, political, historical, geographic and environmental factors. The two professors (one the professor of record and the other was an outside marketing professor from an AACSB accredited university) read the cases and reviewed notes.

**Rubric:**

Learning Outcomes	<i>Beginning = 1</i>	<i>Proficient = 2</i>	<i>Accomplished = 3</i>
<i>Demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions</i>	<p>Analyzes the basics of cultural dimensions and how they can be applied to specific global business situations. Clearly identifies and defines issues/challenges in social, ethical, and multicultural contexts.</p> <p>Reviews the basic impact of globalization and identifies the implications for each functional area.</p>	<p>Discusses extensively cultural dimensions and identifies some specific behaviors to global business situations.</p> <p>Reviews and frames issues in appropriate global contexts and shows competency toward their solutions.</p> <p>Accurately synthesizes the impact of globalization in all the functional areas with basic analysis of cross-functional issues.</p>	<p>Analyzes proficiently various cultural dimensions and is able to apply specific behaviors to international business situations.</p> <p>Displays expertise and competence of contexts through analyses of global business cases.</p> <p>Analyzes the impact of globalization on each area of management and factors and comprehensively yet succinctly presents the cross-functional issues as those relate to globalization.</p>

**Courses where method will be assessed (if applicable):**

MGEM 5109 - Cross-Cultural Marketing and Integrated Marketing Communication

**Evaluators:**

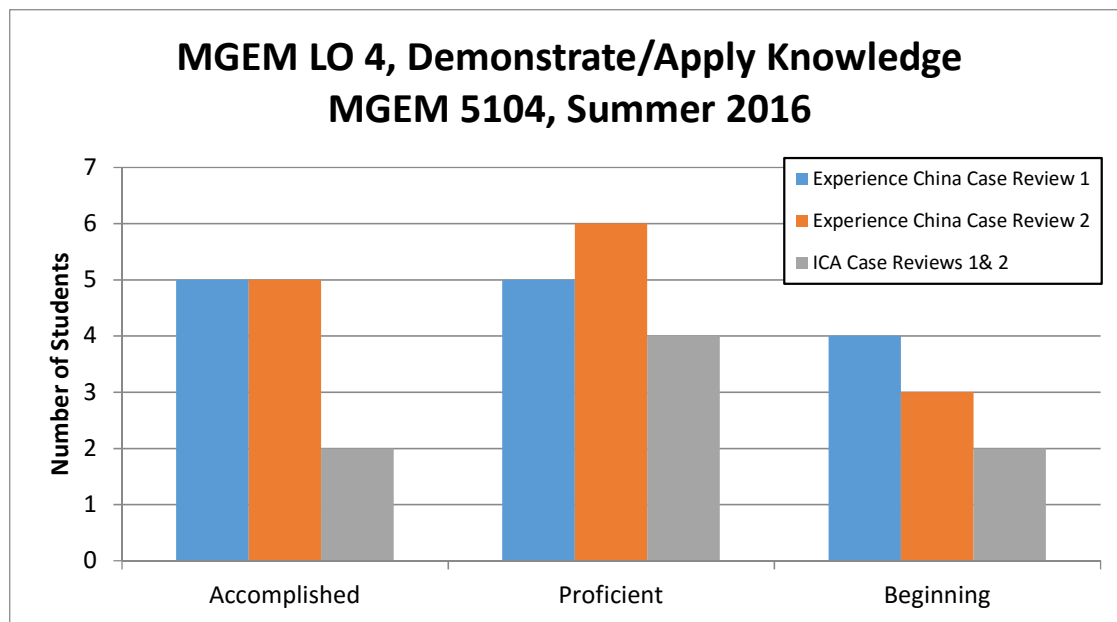
Anthony Patino (University of San Francisco)  
 Veltichka Kaltcheva (Loyola Marymount University)

**Phase 2: Results Assessment and Planned Action**

**Results:**

	Accomplished	Proficient	Beginning	% Students at Exemplary or Accomplished Level
<b>Case Studies:</b>	3	2	1	
Experience China Case Review 1	5	5	4	71%
Experience China Case Review 2	5	6	3	79%

ICA Case Reviews 1 & 2	2	4	2	75%
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In the summer of 2016, forty students were enrolled in MGEM 5109.01 entitled *Cross Cultural Marketing and Integrated Marketing Communications*. A requirement for the class was to complete two case studies from a list of nine options. The two cases selected were *Experience China: A National Image Campaign in the USA* and *ICA: Changing the Supermarket Business*. An aspect of the case write-up was a problem analysis section. In this section, students discussed external factors impacting the problem including a cultural and environmental context. As a result, the learning objective of demonstrating and

applying knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions was evaluated using the cases.

For the Experience China case, a cross-section of 14 students was evaluated. Of the 14 students, the professor of record concluded five students (36%) mastered the objective at the highest level, five (36%) performed adequately and four (28%) did not perform adequately. Overall, the professor of record found 72% of the class performed at least adequately with the objective. The results for the second professor were consistent except for one student. The second professor had five students exceptional, six satisfactory and three unsatisfactory. Both professors discussed the results and were unable to reach a resolution.

For the second case, ICA, a cross-section of eight students was evaluated. Of the eight students, the professor of record concluded that two students (25%) performed exceptional with regards to the learning objective while four performed satisfactory (50%) and two (25%) unsatisfactory. These results were identical to those of the second professor. Overall, 75% of the students performed at least adequately with regards to the learning objective.

### **Suggested Action:**

Because the students did not meet the target for the assessment, next summer, the professor will be completing a series of exercises prior to the first case that reinforces the elements of SELECT by using three mini-cases. By emphasizing the importance of the cross-cultural component, both professors believe students will better integrate it into analysis.

### ***Phase 3: Closing the Loop***

# MGEM AY 2015-2016 Assessment

## Phase 1: Assessment Plan

Learning Outcome assessed:

**MGEM Learning Outcome 05: Identify and Analyze Financial Information**  
 Identify and analyze financial information to make effective managerial

Assessment Method:

Individual Final Exams

Targeted performance, based on rubrics:

80% Exceeds Expectations

Evaluation Process:

Students were tested with individual final exams containing both quantitative and qualitative questions. 2 open questions were assigned to test each four parts of the assessment rubric.

Rubric:

1. Students will be able to calculate EBITDA used in companies valuations decisions	Students will be able to correctly calculate EBITDA used in firms' valuation	Students will be able to apply the correct formula to calculate EBITDA with minor computational mistakes	Students are unable to use the correct formula to calculate EBITDA, or use the formula with major computational mistakes
2. Students will be familiar with cash management techniques	Students can correctly use accounting data to evaluate firms' cash management	Minor error(s) in evaluate firms' cash management	Major error(s) in evaluate firms' cash management
3. Ability to distinguish between pre- and post-money firms' valuation	Students can calculate pre- and post-money firms' valuation	Minor mistake(s) in calculating pre- and post-money firms' valuation	Major mistake(s) in calculating pre- and post-money firms' valuation
4. Calculate and use multiples used in firms' valuation	Students can correctly calculate and use multiples used in firms' valuation	Minor mistake(s) in calculating multiples used in firms' valuation	Major mistake(s) in calculating multiples used in firms' valuation

**Course where learning outcome was assessed:**

MGEM 5112 - Venture Capital, Corporate Entrepreneurship, and Micro Financing

**Evaluator(s):**

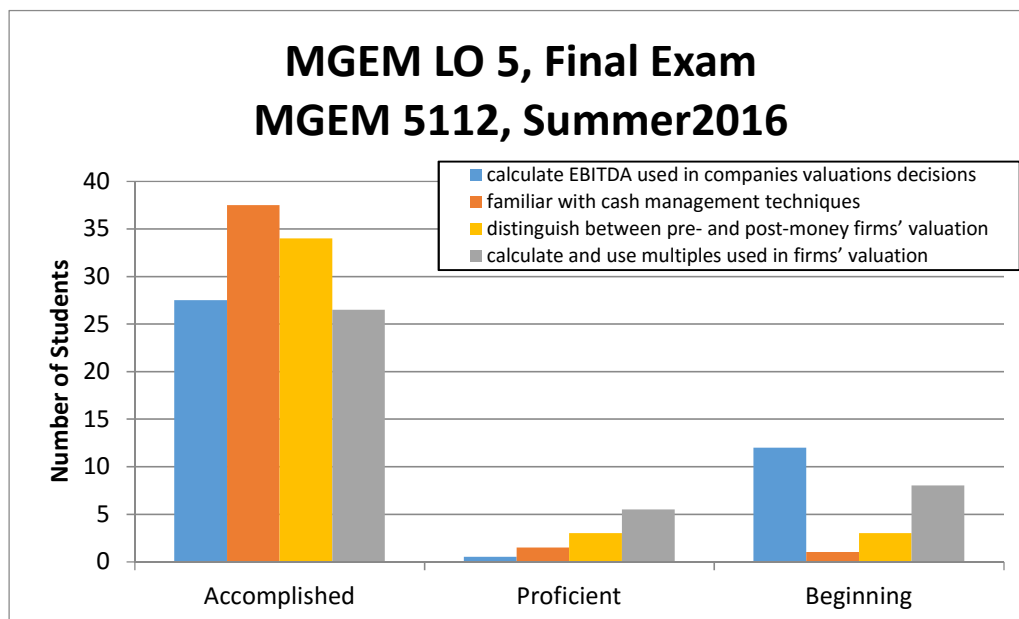
Yuri Fedyk and Gleb Nikitenko

**Phase 2: Results Assessment and Planned Action**

**Results:**

	Accomplished	Proficient	Beginning	% Students at Exemplary or Accomplished Level
Categories:	3	2	1	
1. Students will be able to calculate EBITDA used in companies valuations decisions	28	1	12	70%
2. Students will be familiar with cash management techniques	38	2	1	98%
3. Ability to distinguish between pre- and post-money firms' valuation	34	3	3	93%
4. Calculate and use multiples used in firms' valuation	27	6	8	80%

Cumulative average: 2.23



**Suggested Action:**

Students have demonstrated a rather high level of performance in their familiarity with the valuation concepts on the descriptive level (qualitative aspects), their ability to calculate EBITDA and multiples for valuation purposes (quantitative aspects) was significantly lower –20-30% of the students scoring below the threshold proficiency levels. The results indicated uneven level of preparation and weaker background in the finance material that may partially stem from the gaps in the MGEM Finance curriculum in addition to the undergraduate educational demographics of the cohort.

Finance faculty at IQS (Sylvia Bou) and USF (Yuri Fedyk) have both indicated the need to strengthen the financial/ accounting foundational knowledge of MGEM students, and especially those with no business educational background. As a result of the assessments conducted by IQS and further supplemented by USF, IQS faculty have introduced an introductory finance/ accounting course to be taken prior to the Common Ground in Corporate Valuation course (scheduled for the Fall II semester). The non-credit course has been scheduled to take place for all MGEM students starting Fall 2016 with an option to test out for those who have had the necessary business/ finance training and experience.

***Phase 3: Closing the Loop***

In the year that the assessment is made, this is good place to describe how the suggested actions might be evaluated in a future assessment cycle. When that cycle is complete, the results can be added to this document to finalize the report.

**Questions used in Assessment:**

Rubrics 1: Students will be able to calculate EBITDA used in companies valuations decisions

1. Calculate EBITDA given a company has net income of \$5,300,000; COGS of \$3,900,000; administrative expenses of \$400,000; depreciation & amortization total of \$600,000; interest expense \$500,000; income tax expense \$300,000.
  
2. Company Homwell & Co. manufactures widgets. Total sales are \$560,000. The cost of manufacturing the widgets for the company is \$320,000. Operating expenses are as follows: wages \$10,000; rent \$5,000; sales expenses 4,000; depreciation \$6,000 and amortization 7,000. Accounts payable are \$20,000; accounts receivable are \$50,000. Find EBITDA.

Rubrics 2: Students will be familiar with cash management techniques

3. A company's sales are \$1,000,000; COGS are \$800,000 and accounts payable are \$50,000. Calculate accounts payable average daily costs and number of days it takes to pay.
  
4. A company has inventory days of 65, days payable of 26 and days receivable of 78. Calculate its cash gap.

Rubrics 3: Ability to distinguish between pre- and post-money firms' valuation

5. Company A provides a \$10 million investment to a company with post-money valuation of \$60 million. This implies that Company A has a pre-money valuation of \_\_\_\_\_ and investor's share in the company is \_\_\_\_\_.
  
6. A seed investor adds \$15mm into an existing pool of \$60mm. What is this seed investor's % share of the post-money in the pool? What is the post money company value after that seed investment? Investor B then adds a \$20mm investment, using post-money of the previous seed round as pre-money value of the second round. What is investor B's % share of the total post-money pool?

Rubrics 4: Calculate and use multiples used in firms' valuation

7. Company A has EBITDA of \$500,000 and Sales of \$1,500,000; Company B has EBITDA of \$700,000 and Sales of \$3,000,000. Both are industrials companies with average EV/EBITDA multiples of 7x and EV/Sales multiples of 2x. Calculate the enterprise values of Company A and



Company B first using EV/EBITDA valuation multiples and next using EV/Sales valuation multiples.

8. For which company stages EV/sales is more appropriate than EV/EBIDTA valuation method? Why?

# **MSFA Program**

## MSFA Assurance of Learning Report

AY 2015-2016

**Report Date:** December 1, 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: *1-1 Analytical Tools - Finance*

*Employ fundamental quantitative techniques essential in financial analysis and investment management including (i) the time value of money, (ii) the basics of statistics and probability theory, (iii) probability theory applied in the field of investment valuation and financial risk management, and (iv) joint behavior of two or more variables, including correlation and linear regression.*

Evaluator(s): *John Veitch*

### Assessment Plan:

Assessment Method Category: *Pre-Test/Post-Test*

Assessment Method: *USF CFA Review Quiz on the Quantitative Methods section.*

Target: *75% of students will achieve a "Satisfactory level" on the quiz.*

Courses where method is assessed (if applicable): *MSFA 736 Econometrics*

Additional Detail (if applicable): *Assigned at the beginning of MSFA 736 Econometrics*

## Phase 2: Results Assessment

### Results:

Result Date: 7/15/2015

Result Type: *Target Met*

Result: *All the students received grades of 90% or better on each of the three quizzes that reviewed probability, statistics and hypothesis testing.*

Course(s) from which the assessment(s) were gathered: *MSFA 736-31 and -41. This is the Fall 2014 and Spring 2015 Full-time MSFA cohorts.*

Related Documents:

- *Outcomes for FT MSFA students: Grades-MSFA-736-31 Summer 2015.xlsx*
- *Quizzes used in online assessment: Quant Level I SS3 Quizzes.docx*

### Action:

Action Date: 11/8/2015

Assessment: *Indicates quantitative skills performed at expected level or beyond.*

Action: *Move the Econometrics course into the MSFA first semester to develop these skills earlier in the program. This will support more advanced assignments and LOS in later courses.*

## MSFA Assurance of Learning Report

**AY 2015-2016**

**Report Date:** December 1, 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 *Learning Outcome: 3-1 Ethics - Standards*

*Describe the framework for ethical conduct as set out in the CFA Institute Code of Ethics and Standards of Professional Conduct and Global Investment Performance Standards (GIPS®).*

Evaluator(s): *John Veitch*

### Assessment Plan:

Assessment Method Category: *Pre-Test/Post-Test*

Assessment Method: *USF CFA Review Online program quiz on the Level I Ethics session.*

Target: *75% of the students will achieve a "Satisfactory level" or better on the quiz.*

Courses where method is assessed (if applicable): *MSFA 728 Ethics and Finance*

Additional Detail (if applicable): *Assigned at the end of MSFA 728 Ethics and Finance I*

## Phase 2: Results Assessment

### Results:

Result Date: 11/11/2015

Result Type: *Target Not Met*

Result: *All students completed the online CFA Institute training in Ethics (14 hours across 7 areas) and ALL students received the set of completion certificates from the CFA Institute.*

*NO students achieved a result of 75% or better on the Ethics Assessment exam. Thus the online Ethics training did NOT accomplish its goal.*

Course(s) from which the assessment(s) were gathered: *MSFA 725-41 The Fall 2015 Full-time MSFA cohort.*

Related Documents:

- *Ethics I Grades with Distribution: Grades-MSFA-728-41 Fall 2015.xlsx*
- *Outline of Ethics I Topics and delivery mode: MSFA 728 CFA Ethics Online Training.docx*
- *Assessment Exam for Ethics I: MSFA 728 Final Exam.docx*

### Action:

Action Date: 11/11/15

Assessment: *The prior live version of the course was not specific enough to CFA Ethics LOS. This was the main reason for moving to an online course format developed specifically by the CFA Institute to cover the Ethics LOS.*

Action: *In Fall 2015, the MSFA program moved to this online CFA Institute Ethics format where students take 14+ online hours studying the CFA Institute Ethical Standards. The expectation was for improved outcomes on the specific CFA Ethics LOS.*

*All students received Certificates of Completion for all 7 Ethics modules from the CFA Institute. GOOD*

*Unfortunately on a short assessment exam that placed these Ethical Standards in real life situations, only 12.5% of these same students met the satisfactory level (75%).*

*For Spring 2016, we will modify the course so there is more live class sessions to discuss the Ethical Standards in real-life investment situations. (11/08/2015)*

# **MSOD Program**



# MSOD AY 2015-2016 Assessment

## *Phase 1: Assessment Plan*

### Learning Outcomes assessed:

#### **Program Goal 1 - Understanding the Foundations, Theories and Models of OD**

- **Learning Outcome 1a:** Students will become familiar with the key concepts, research, theories and models in OD.
- **Learning Outcome 1b:** Students will apply OD theories and models to change interventions in organizations.

#### **Program Goal 2 - Ability to Lead Change and Use Self-as-Instrument**

- **Learning Outcome 2a:** Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.
- **Learning Outcome 2b:** Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.

#### **Program Goal 3 - Proficiency in Organizational Inquiry, Research and Analysis**

- **Learning Outcome 3a:** Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).
- **Learning Outcome 3b:** Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.

#### **Program Goal 4 - Competence with Teams, Culture and Diversity**

- **Learning Outcome 4a:** Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.
- **Learning Outcome 4b:** Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.

#### **Program Goal 5 - Connection to San Francisco Location and Ignation Education Values**

- **Learning Outcome 5a:** Students will apply OD in San Francisco Bay Area organizations across sector, industry, and organizational life cycle.
- **Learning Outcome 5b:** Students will develop and promote Ignation values in their OD work (e.g., caring for the mind, body and spirit of the whole person, striving for excellence , providing service to those in need, reflecting then acting for change)

**Assessment Method:**

Evaluation of culminating project presentations and papers in OD 690.

**Targeted performance, based on rubrics:**

80% meet expectations

**Evaluation Process:**

Learning outcomes were assessed in the Culminating Project class. In this class, students have the opportunity to employ learning from each of their previous courses as they work in their student teams and with their client organizations. Through the team OD project, students integrate research with theory and practice by conducting an organizational change diagnostic case study and/or intervention evaluation with a client of their choosing.

Two class assignments were used for the assessment. The first was the team culminating project *presentation* and the second was the team culminating project *paper*. Teams presented their culminating project to a panel of experts (both academics and practitioners) and all 10 learning outcomes were assessed on a 5 point rubric. An outside evaluator, familiar with the class and program through adjunct teaching, assessed the team project papers. This evaluator used the same learning outcomes rubric that was used for the presentations. See below.

**Courses where learning outcome was assessed:**

OD 690: OD Culminating Project

**Evaluator(s):**

The culminating project *presentation* was evaluated by five evaluators: three evaluators were instructors in the program and two were OD practitioners. An additional external evaluator, who has worked as an adjunct for the program, evaluated the team culminating project *papers*.

**Rubric:**

Program Goal	Learning Outcome	Did not meet expectations 1-2	Met expectations 3-4	Exceeded expectations 5	Unable to Assess
1) Understanding the Foundations, Theories and Models of OD	a) Students will become familiar with the key concepts, literature, theories and models in OD.	Did not demonstrate familiarity with OD concepts or theories.	Familiar with key concepts, theories and models.	Demonstrated significant mastery of concepts, theories and models.	
	b) Students will apply OD theories and models to change interventions in organizations.	Did not apply appropriate OD theories and models to the project.	Applied appropriate OD theories and models to the OD culminating project	Demonstrated significant skill at applying theories and models to the OD culminating project.	
2) Ability to Lead Change and Use Self-as-Instrument	a) Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.	Did not develop skills or only demonstrated limited skills in these areas.	Developed skills and demonstrated proficiency in most of these areas.	Demonstrated exemplary skills in all of these areas.	
	b) Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.	Did not develop skills or only demonstrated limited skills in these areas.	Developed skills and demonstrated proficiency in most of these areas.	Demonstrated exemplary skills in all of these areas.	
3) Proficiency in Organizational Inquiry, Research and Analysis	a) Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).	Did not demonstrate proficiency in OD research methods.	Demonstrated proficiency in research methods for OD.	Showed exemplary ability in research methods for OD and all data collection methods.	
	b) Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.	Did not demonstrate understanding or only limited facility in analysis.	Competently conducted both qualitative and quantitative analysis and linked findings to recommendations.	Demonstrated exceptional command of qualitative and quantitative analytic methods which informed evidence-based recommendations.	
4) Competence with Teams, Culture and Diversity	a) Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.	Did not demonstrate ability to work effectively in and with teams.	Contributed positively in a team context and displayed skills in effective team work.	Demonstrated significant mastery of and effectiveness in working in and with teams.	
	b) Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.	Showed limited understanding of organizational culture and the impact global culture and diversity inclusion has on it.	Showed understanding of organizational culture and the impact global culture and diversity inclusion has on it.	Showed significant understanding of organizational culture and the impact global culture and diversity inclusion has on it.	
5) Connection to San Francisco Location and Ignatian Education Values	a) Students will apply OD in San Francisco Bay Area organizations across sector, industry, and organizational life cycle.	Minimally applied OD in Bay Area. Did no interact with organizations across sector, industry and life cycle	Connected with Bay Area Organizations in at least on sector, industry.	Evidence of significant connection with Bay Area organizations across sector, industry and through stages of organizational growth.	
	b) Students will develop and promote Ignatian values in their OD work (e.g., caring for the mind, body and spirit of the whole person, striving for excellence, providing service to those in need, reflecting then acting for change)	Showed limited development of Ignatian values in their OD work.	Demonstrated development and encouragement of Ignatian values in their OD work.	Showed significant development and promotion of Ignatian values in their OD work.	

**Phase 2: Results Assessment and Planned Action**

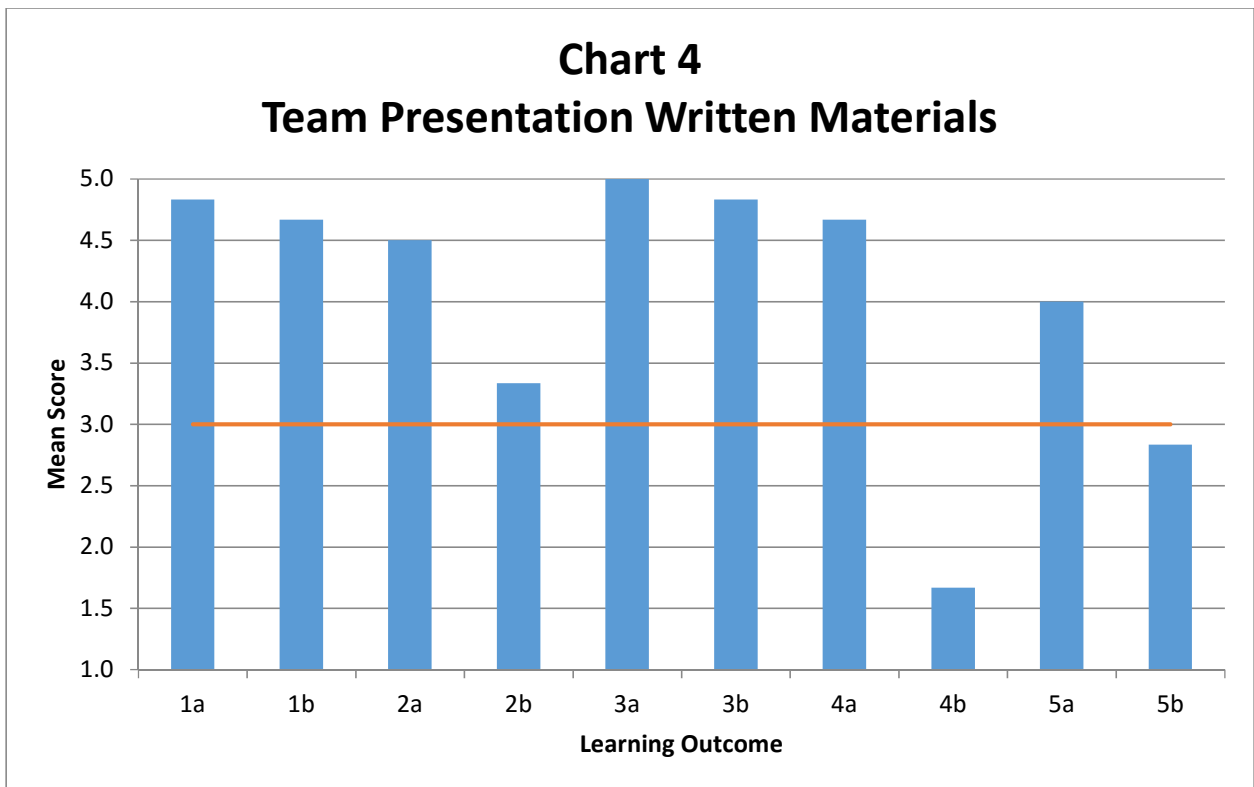
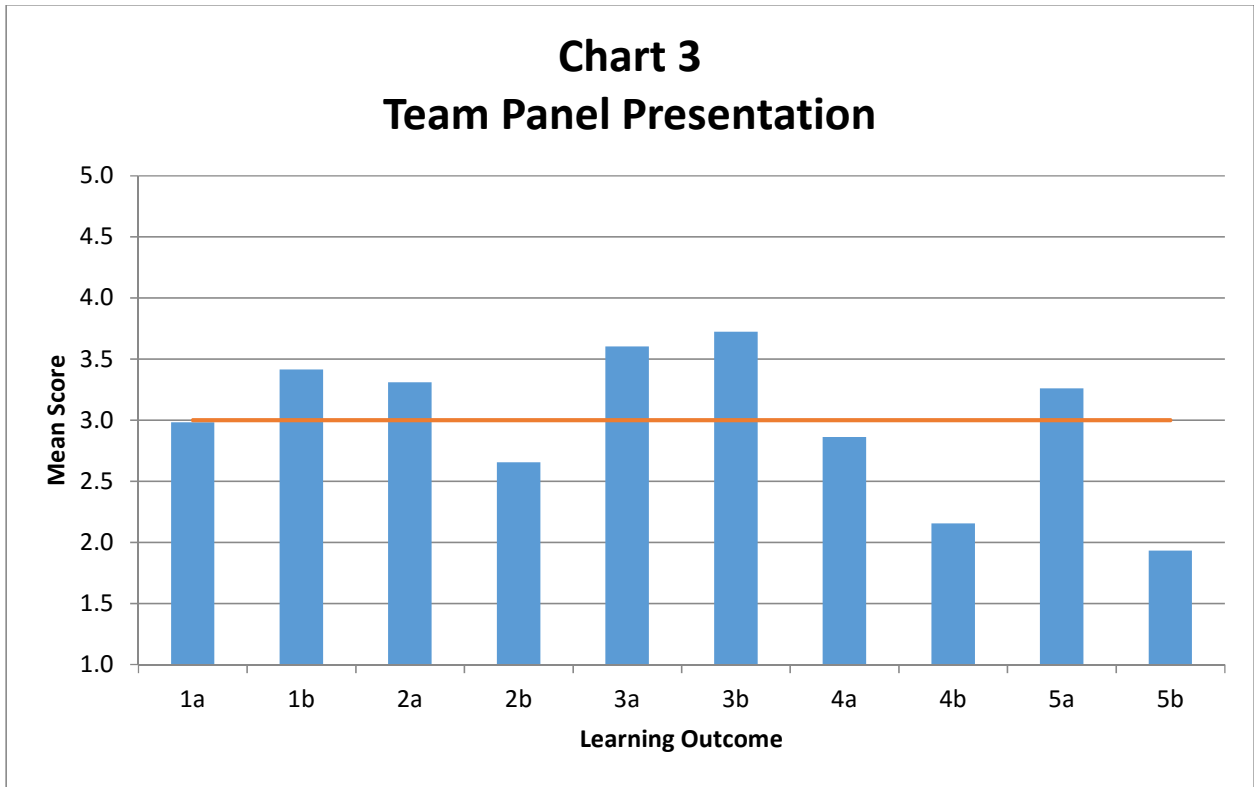
**Culminating Project – Team Presentation and Written Paper Assessments**

For the presentation, there were six teams evaluated by five panelists. It should be noted that one team had only four panelists because a panelist needed to leave early. Written papers were evaluated by a single external evaluator.

For both the presentation and the paper, in some cases, the evaluator was unable to assess the team against the given Learning Outcome. Those n/a or blank entries were replaced with a score of 1 for the following data representation (Note: the scale ranged from 1 to 5 where 1 = did not meet expectations and 5 = exceeded expectations. A rating of 3 or above indicated that teams met or exceeded expectations.) Table 1 shows the mean ratings across teams on a particular learning outcome, for the two different assessments.

**Table 1: Average Scores**

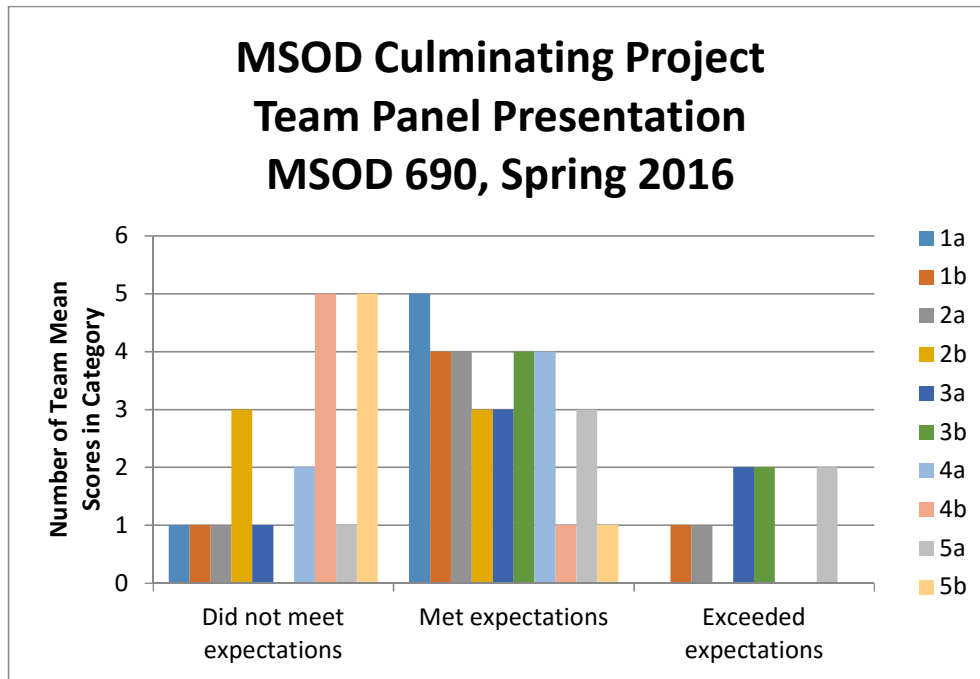
<b>Learning Outcome</b>	<b>Presentation Assessment Mean</b>	<b>Paper Assessment Mean</b>
1a) Students will become familiar with the key concepts, literature, theories and models in OD.	3.0	4.8
1b) Students will apply OD theories and models to change interventions in organizations.	3.4	4.7
2a) Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.	3.3	4.5
2b) Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.	2.7	3.3
3a) Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).	3.6	5.0
3b) Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.	3.7	4.8
4a) Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.	2.9	4.7
4b) Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.	2.2	1.7
5a) Students will apply OD in San Francisco Bay Area organizations across sector, industry, and organizational life cycle	3.3	4.0
5b) Students will develop and promote Ignation values in their OD work (e.g., caring for the mind, body and spirit of the whole person, striving for excellence , providing service to those in need, reflecting then acting for change)	1.9	2.8



## Culminating Project – Team Panel Presentation

Number of Team Mean Scores in Each Category

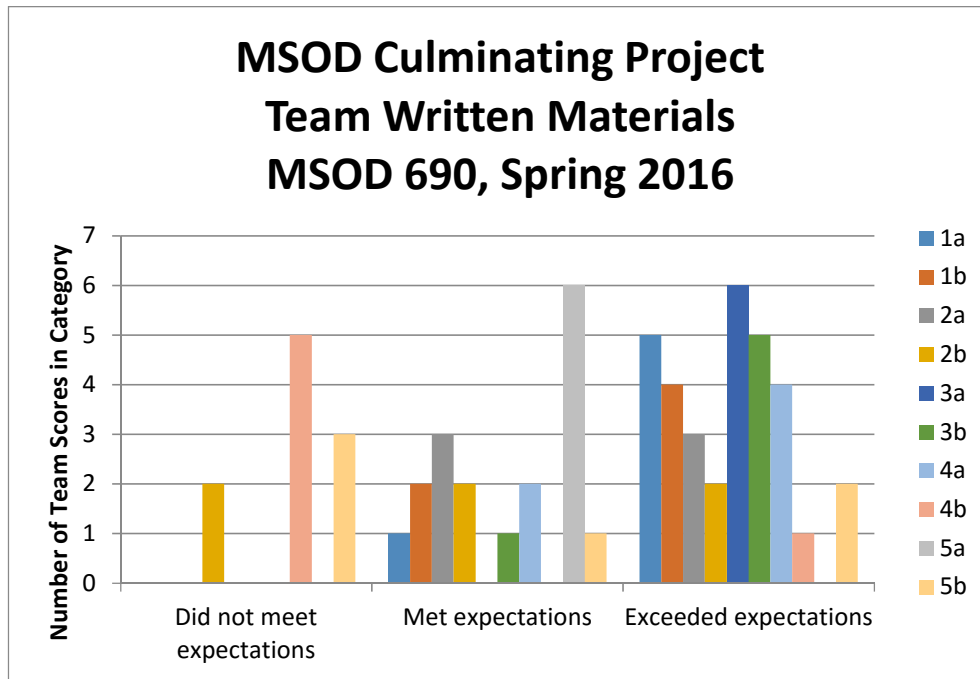
Learning Outcome	Did not meet expectations < 2.5	Met expectations ≥ 2.5, ≤ 4.0	Exceeded expectations > 4.0	% Students Meeting or Exceeding Expectations
1a	1	5	0	83%
1b	1	4	1	83%
2a	1	4	1	83%
2b	3	3	0	50%
3a	1	3	2	83%
3b	0	4	2	100%
4a	2	4	0	67%
4b	5	1	0	17%
5a	1	3	2	83%
5b	5	1	0	17%



## Culminating Project – Team Written Assignment

Number of Team Scores in Each Category

Learning Outcome	Did not meet expectations 1-2	Met expectations 3-4	Exceeded expectations 5	% Students Meeting or Exceeding Expectations
1a	0	1	5	100%
1b	0	2	4	100%
2a	0	3	3	100%
2b	2	2	2	67%
3a	0	0	6	100%
3b	0	1	5	100%
4a	0	2	4	100%
4b	5	0	1	17%
5a	0	6	0	100%
5b	3	1	2	50%



## Interpretation of Data and Actions:

The data gathered in May 2016 for the AY 2015/2016 suggest that we are successfully meeting expectations on most of our learning outcomes; however, there were a number of areas where panelists for the presentation and the individual assessor for the papers were not able to assess the given learning outcome. We had experienced this issue in our assessment for AY 2014/2015 where a number of LOs could not be assessed. We concluded, that since the presentation by its nature is only a synopsis of the total work on the project and much of the substance of the project can be lost when only hearing the short 20 minute presentation, we would implement an additional assessment for AY 2015/2016. The additional assessment was the culminating project paper assessment. While there were a number of areas that were still “unable to assess” (see addendum) this was greatly diminished when the evaluator was able to review the extensive and comprehensive project papers.

Of the three learning outcomes that had a few teams that were difficult to assess based on the evaluation of the team papers (2b, 4b, and 5b), the one that seems the most significant and indicative of not meeting our LO is 4b (only 1 team out of 5 was able to be assessed on this LO). This LO states that “Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives”. The OD program will be taking two specific actions in relation to this finding: 1. The faculty will meet to discuss this data and the review the importance of this LO for the program. 2. If we determine that this LO is indeed integral to the degree, we will create a plan for better integrating this learning into the curriculum. Some early suggestions, based on informal discussions with the Advisory Group and some faculty, indicate that creating a core class on diversity, inclusion and culture might be an important move forward. An OD faculty meeting will be held in October 2016 to discuss this.

Learning outcome 2b (Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions) and 5b (Students will develop and promote Ignation values in their OD work (e.g., caring for the mind, body and spirit of the whole person, striving for excellence, providing service to those in need, reflecting then acting for change) had at least 50% of the teams able to be assessed on these and of those able to be assessed, all met or exceeded expectations. This might indicate that more explicit instructions in the culminating project paper needs to be established to make sure all teams are demonstrating their learning in these areas. This will be reviewed during our OD faculty meeting and further actions will be discussed.

A few other specific suggestions made by the culminating project paper evaluator that we will discussed at the OD faculty meeting in October.

- “2a” Seems like it could be more clearly labeled “Use of OD Consulting Skills to Lead Organization Development and Change Projects” (the detailed list goes with this title and many of the culminating projects are OD work writ large rather than only change efforts) “2b” then could just be “Use of Self” (both with client and self)
- It seems like a Program Goal could be added around Project Managements Skills. You have one whole course in the program for this and it already seems like a large part of the culminating project. I know the expectation out there now is increasingly that MSOD trained folks will have the ability to structure a large OD project in all these pm aspects.
- Re 3 b -small thing but might be better to say” qualitative **and/or** quantitative analytic methods” as some projects can lend themselves to one or the other or both.

In addition, it is important to note that all our assessments to date have been at the team level. We acknowledge that an individual level assessment is an important additional indicator of assurance of learning. It is our intention to add an individual level assessment to our AoL for AY 2016/2017. We have identified a course (OD 673: Large Scale System Transformation) where learning outcomes 1b, 2b, 3b, and 4a can be evaluated. We have also



identified an independent outside evaluator and we are currently in the process of contracting with this evaluator to begin assessments. Additional individual level assessments for the remaining learning goals will also be assessed in subsequent years. We have identified a course (OD 660: Understanding Behavior in Organizations) to assess LOs 1a, 2a and 4b) which will be assessed in AY 2017/2018 and another course (OD 668: Research and Analysis for OD) to assess LOs 3a and 3b in AY 2018/2019. We will continue our comprehensive team assessments of the culminating project presentations and papers while also implementing individual-level assessments of specific LOs in a three year cycle.

### **What did we learn about student learning?**

The OD program learned that student teams are meeting or exceeding expectations in 7 of 10 of our learning outcomes based on the assessment of the culminating project papers. Please see the Interpretation and Actions section for more specifics.

### **What did we learn about the process?**

The OD program learned that while a good indicator of many of our LOs, the culminating project presentation was an incomplete and imperfect mechanism for assessing all of our LOs. The culminating team project papers, however, appear to be much more comprehensive and allowed the evaluator to assess most of the LOs in the program. We are looking to continue to improve our assessment of 3 specific learning outcomes and to also begin to integrate individual-level assessments into our AoL procedures.

### **Suggested Action:**

See above.

### ***Phase 3: Closing the Loop***

Once we determine best next steps we will integrate changes into the curriculum and reassess in subsequent years then re-evaluate in a continuous cycle of improvement.

*To be filed the year after the results assessment.*

### **Change Assessment**

Discuss how the actions taken in Phase 2 were assessed, and the results of that assessment

# Addendum: Culminating Project Scores.

USF School of Management

**MSOD Culminating Project Panel Assessment**

Evaluation course: OD 690, OD Culminating Project

Term: Spring 2016

[n/a] and replaced with a score of 1

blanks replaced with a score of 1

Program Goal	1) Understanding the Foundations, Theories and Models of OD		2) Ability to Lead Change and Use Self-as-Instrument		3) Proficiency in Organizational Inquiry, Research and Analysis		4) Competence with Teams, Culture and Diversity		5) Connection to San Francisco Location and Ignition Education Values	
Learning Outcome	a) Students will become familiar with the key concepts, literature, theories and models in OD.	b) Students will apply OD theories and models to change interventions in organizations.	a) Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.	b) Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.	a) Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).	b) Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.	a) Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.	b) Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.	a) Students will apply OD in San Francisco Bay Area organizations across sector, industry, and organizational life cycle	b) Students will develop and promote ignition values in their OD work (e.g., caring for the mind, body and spirit of the whole person, striving for excellence, providing service to those in need, reflecting then acting for change)
Presentation #1: Assessing Employee Alignment with the Vision, Mission and Approach of Tides (Team Five)										
Team 1 eftLee	2	3	3.5	1	2.5	1.5	1	2	5	1
Team Five First Presenters.	1	3	4	1	4	4	5	1	1	1
Team Five	4	4	3	2	4	4	1	4	4	1
Tides Team FIVE	4	4	4	4	4	4	1	1	6	1
All Team A 1 How to actualize vision, mission	5	4	5	5	4	5	4	2	5	4
Presentation #2: Ambassador Collaboration Effectiveness (KASA Consulting)										
Team 2 ebeLee	4	4	4	1	4.5	5	5	4	2.5	2
KASA Team 2	1	5	5	1	4	4	5	1	1	1
Angelhack Team 2 KASA	4	4	4	2	4	4	1	4	4	1
Angelhack KASA House of Learning	3	3	1	1	4	5	4	1	3	1
All Team 3 * Improve Effectiveness	4	2	1	4	5	4	4	1	1	1
Presentation #3: Gap Inc. College Programs Talent Acquisition Team (Townsend Inc.)										
Team 3 Lee	2	2	4	1	4	4	4	2	4	1
Townsend Inc. Team 3 Gap	1	1	4	1	4	5	4	1	1	1
Team 3 Gap Inc.	4	4	1	4	4	5	4	1	4	1
Intern to Employee Gap	1.5	1	1	1	5	5	1	1	3	1
All Team B 2 Internship with Gap	1	1	4	5	4	3	4	5	4	4
Presentation #4: Culture@Code2040 (Fusion)										
Team 4 Lee	2	4	5	4	2.5	4	5	5	4	1
Team Fusion 4th Presentation	1	4	5	1	5	4	5	1	1	1
Team 4 Code 2040	5	5	4	5	4	4	1	1	1	1
Culture @Code 2040 Fusion	4	4	5	4	3	3	1	1	5	1
Team 4 Culture Ali	5	4	3	3	5	5	1	1	4	5
Presentation #5: The Analysis of Employee Engagement at Org J (Team Trans4mers)										
Team #5 Lee	2	4	2	4	2	2	4	2	4	2
Transformers 5th Presentation	1	2	2	1	2	2	3	1	1	1
"Feedback" Trans4mers	3	3	2.5	3	4	3.5	3	4	4	1
Team 6 Ali Staff Engagement	4	5	1	1	1	4	1	4.5	1	1
Presentation #6: Super Stars Literacy (Kingston Consulting Group)										
team #6 Lee	5	4	4	4	2	2	4	2	5	4
Kingston Consulting 6th Presentation	1	5	5	3	1	1	1	3	4	5
Team 6	4	1	1	4	4	4	1	1	4	5
Engaging Superstars Kinston consulting	4	5	4	5	3	3	4	4	4	5
Team 6 Rater Matt Monnot	4	4	4	1	4	4	1	1	4	1
Culminating Project Assessment by external evaluator (Loni Davis):										
Team #1: Team Five	5	5	4	1	5	5	5	1	4	4
Team #2: KASA Consulting	5	4	5	1	5	5	4	1	4	5
Team #3: Kingston Consulting Group	5	5	5	5	5	5	5	1	4	5
Team #4: Fusion	5	5	4	4	5	4	5	5	4	1
Team #5: Team Trans4mers	5	5	5	4	5	5	5	1	4	1
Team #6: Townsend Inc.	4	4	4	5	5	5	4	1	4	1
Panel Assessment Mean Score	3.0	3.4	3.3	2.7	3.6	3.7	2.9	2.2	3.3	1.9
Written Assessment Mean Score	4.8	4.7	4.5	3.3	5.0	4.8	4.7	1.7	4.0	2.8

**Addendum:**

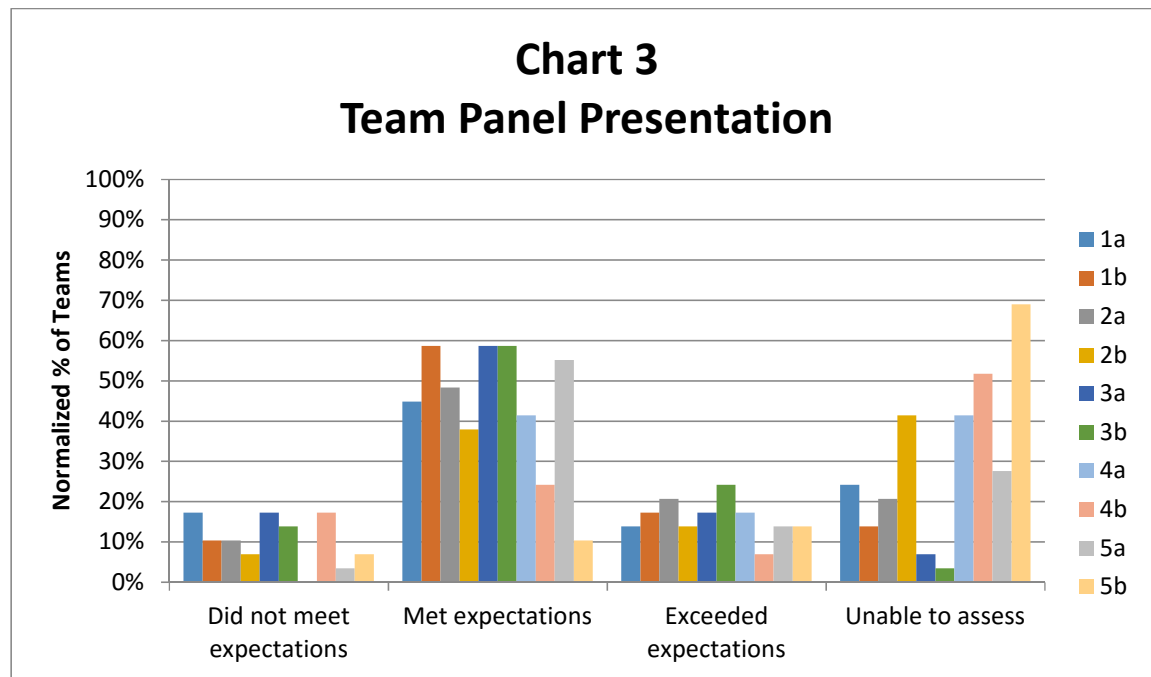
**Culminating Project – Team Panel Presentation**

There were six teams evaluated by five panelists. One team was only evaluated by four of the panelists.

**Table 3: Team Panel Presentation**

Normalized % of Teams in each category

Learning Outcome	Did not meet expectations 1-2	Met expectations 3-4	Exceeded expectations 5	Unable to assess	% Students Meeting or Exceeding Expectations
1a	17%	45%	14%	24%	59%
1b	10%	59%	17%	14%	76%
2a	10%	48%	21%	21%	69%
2b	7%	38%	14%	41%	52%
3a	17%	59%	17%	7%	76%
3b	14%	59%	24%	3%	83%
4a	0%	41%	17%	41%	59%
4b	17%	24%	7%	52%	31%
5a	3%	55%	14%	28%	69%
5b	7%	10%	14%	69%	24%



### Culminating Project – Team Presentation Written Materials

Written materials were evaluated by a single external evaluator. In the following table each team is counted exactly once.

**Table 4: Team Presentation Written Materials**

Normalized % of Teams in each category

Learning Outcome	Did not meet expectations 1-2	Met expectations 3-4	Exceeded expectations 5	Unable to assess	% Students Meeting or Exceeding Expectations
1a	0%	17%	83%	0%	100%
1b	0%	33%	67%	0%	100%
2a	0%	50%	50%	0%	100%
2b	0%	33%	33%	33%	67%
3a	0%	0%	100%	0%	100%
3b	0%	17%	83%	0%	100%
4a	0%	33%	67%	0%	100%
4b	0%	0%	17%	83%	17%
5a	0%	100%	0%	0%	100%
5b	0%	17%	33%	50%	50%

