



## SLO Assessment Cycle for BUS 69

*Investment Fundamentals* SLO Modified: [01/07/2011]

### Michele Fritz's Team Members:

1. [Dan Salah](#) (x5563) BUS

#### Additional Team members not on list/notes about team:

Gary Neidermier,

#### Additional Notes:

### Outcomes:

#### Outcome 1: Statement Modified: []

Demonstrate a working knowledge of the investment environment and various investment options including equities, fixed income securities, and derivatives.

### Assessment Cycle Records:

#### Outcome 1: Assessment Planning Modified: [03/03/2011]

#### Assessment Strategy Used:

Quarter: Fall 2010

Assessors: Angus Blackwood

Assessment Tools: Exams

Sections being assessed: 61

#### Outcome 1: Reflect & Enhance Modified: [06/20/2011]

#### Number of people involved in Phase III: 1

#### Changes:

#### Methods:

The SLO were assessed through student examinations and quizzes.

For example, question 30 from the midterm examination reads:

The Ibbotson Associates studies of rates of return suggest that

1. Treasury bills match the rate of inflation

2. Stocks of smaller companies generate higher returns than larger companies

3. Corporate bonds generate higher returns than treasury bonds

a. 1 and 2

b. 1 and 3

c. 2 and 3

d. all three

This question tests the student's knowledge of specific asset classes.

#### Summary:

No testing data on this exam is currently available.

The SLO does not need revision.

#### Enhancement (Part I):

The textbook publisher has decided not to offer an updated edition of the text and a new textbook will be adopted beginning Fall 2011. Test questions have been provided by the publisher and a new examination questions will be generated.

#### Enhancement (Part II):

None.

*Note from Dept. Chair: Angus Blackwood has been advised that collecting and analyzing data is part of the required assessment cycle. Sample reports from other instructors have been made available to him. However, what is written here is all that this part time instructor has to report at this time.*

#### Outcome 2: Statement Modified: []

Compare and contrast competing portfolio theories and

#### Outcome 2: Assessment Planning Modified: [06/20/2011]

#### Assessment Strategy Used:

hypotheses.

Quarter: Fall 2010  
Assessors: Angus Blackwood  
Assessment Tools: Exams  
Sections being assessed: 61

**Outcome 2: Reflect & Enhance** Modified: [06/20/2011]

**Number of people involved in Phase III: 1**

**Changes:**

**Methods:**

The SLO were assessed through student examinations and quizzes. For example, question 29 from the final examination reads:

The Sharpe index standardizes returns by the portfolio's

- composition
- beta
- standard deviation
- risk free rate

Students must know differing portfolio theories and be able to compare and contrast the theories.

**Summary:**

The SLO does not need revision.

**Enhancement (Part I):**

As previously discussed, the textbook publisher has decided not to offer an updated edition of the text and a new textbook will be adopted beginning Fall 2011. Test questions have been provided by the publisher and a new examination questions will be generated. Past examinations have not been graded electronically and examination statistics were not manually calculated or otherwise available. Following the adoption of a new textbook in Fall 2012, the course will test electronically and begin to monitor examination question effectiveness.

**Enhancement (Part II):**

None.

*Note from Dept. Chair: Angus Blackwood has been advised that collecting and analyzing data is part of the required assessment cycle. Sample reports from other instructors have been made available to him. However, what is written here is all that this part time instructor has to report at this time.*

**Outcome 3: Statement** Modified: []

Measure portfolio performance.

**Outcome 3: Assessment Planning** Modified: [06/20/2011]

**Assessment Strategy Used:**

Quarter: Fall 2010  
Assessors: Angus Blackwood  
Assessment Tools: Exams  
Sections being assessed: 61

**Outcome 3: Reflect & Enhance** Modified: [06/20/2011]

**Number of people involved in Phase III: 1**

**Changes:**

**Methods:**

The SLO were assessed through student examinations and quizzes. For example, question 118 from the midterm examination reads:

If a preferred stock pays an annual \$4.50 dividend, what should be the price of the stock if comparable yields are 10 percent? What would be the loss if yields rose to 12 percent?

This questions test multiple variables; students must know what constitutes return components, such as income, gains, and losses and the student must demonstrate the quantitative ability to calculate simple returns.

**Summary:**

The SLO does not need revision.

**Enhancement (Part I):**

As previously discussed, the textbook publisher has decided not to offer an updated edition of the text and a new textbook will be adopted beginning Fall 2011. Test questions have been provided by the publisher and a new examination questions will be generated. Past examinations have not been graded electronically and examination statistics were not manually calculated or otherwise available. Following the adoption of a new textbook in Fall 2012, the course will test electronically and begin to monitor examination question effectiveness.

**Enhancement (Part II):**

None.

*Note from Dept. Chair: Angus Blackwood has been advised that collecting and analyzing data is part of the required assessment cycle. Sample reports from other instructors have been made available to him. However, what is written here is all that this part time instructor has to report at this time.*

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[ Number of Outcomes for BUS 69: 3 ]