







Online Assessment Tracking Database

Sam Houston State University (SHSU)
2014 - 2015

Money Management Center







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| Goal | Educational Personal Finance Outreach  The Student Money Management Center will provide effective personal financial outreach programming. |
| Objective (L) | Increase Student Knowledge Of Personal Finance Through Outreach Programming  The Student Money Management Center will increase students' knowledge of personal finance-related topics suggested by the State of Texas Senate Bill 1590: budgeting, credit cards, spending, saving, loan repayment and consolidation, taxes, retirement planning, insurance, and financing of healthcare and other benefits. |
| Indicator | Program Assessment Surveys Or FDIC Certificate Of Completion  The program assessment results for specified activities will serve as evidence of the successful completion of this objective. |
| Criterion | Student Knowledge Increased Through Classroom Outreach  Students who attend classroom presentations and classroom workshops provided by the Student Money Management Center will increase their knowledge by attending the program. This will demonstrate the effectiveness of the Student Money Management Center's outreach programming on student learning of personal finance topics relative to the topics suggested by State of Texas Senate Bill 1590: budgeting, credit cards, spending, saving, loan repayment and consolidation, taxes, retirement planning, insurance, and financing of healthcare and other benefits. |
| Finding | Classroom Outreach Successful  There were a total of 36 classroom presentations. Of the 689 students in attendance, 684 students completed the survey. Of the 684 students surveyed, 88.51% indicated they had learned one or more specific pieces of personal finance knowledge by attending the program. Student count of personal finance topics learned in classroom outreach: Budgeting: 218; Credit: 155; Loans: 103; Retirement Planning: 2; Investing: 85; and Insurance: 2. |
| Criterion | Student Knowledge Increased Through Financial Literacy Week Event  At least 80% of students who attend Financial Literacy Week 2015, will indicate a specific piece of personal finance knowledge they learned by attending the program. This will demonstrate the effectiveness of the Student Money Management Center's outreach programming on student learning of personal finance topics presented during the week relative to the topics suggested by State of Texas Senate Bill 1590: budgeting, credit cards, spending, saving, loan repayment and consolidation, taxes, retirement planning, insurance, and financing of healthcare and other benefits. |

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| Finding | <p>Financial Literacy Week Did Or Did Not Meet Target Goal 🔑</p> <p>Per event tracking, 1,533 students were in attendance for Financial Literacy Week. Of these students, 1,178 completed the survey. Of the 1,178 students surveyed, only 60.19% indicated they had learned a specific piece of personal finance knowledge by attending the program. Student count of personal finance topics learned at Financial Literacy Week Events: Budgeting: 265; Loans: 13; Investing: 104; Retirement Planning: 10; Insurance: 58; Credit: 29; and Healthcare: 3.</p> |
| Criterion | <p>Student Knowledge Increased Through Outreach Programming Events 🔑🔑</p> <p>At least 80% of students who attend Student Money Management Center provided outreach events such as monthly workshops, will indicate a specific piece of personal finance knowledge they learned by attending the program. This will demonstrate the effectiveness of the Student Money Management Center's outreach programming on student learning of personal finance topics relative to the topics suggested by State of Texas Senate Bill 1590: budgeting, credit cards, spending, saving, loan repayment and consolidation, taxes, retirement planning, insurance, and financing of healthcare and other benefits.</p> |
| Finding | <p>Outreach Programming Events Successful 🔑</p> <p>There were a total of 46 outreach programs presented. Of the 874 students in attendance, 791 students completed the survey. Of the 791 students surveyed, 83.95% indicated they had learned one or more specific pieces of personal finance knowledge by attending the program. Student count of personal finance topics learned in outreach programming events: Budgeting: 230; Credit: 80; Student Loans: 148; and Investing: 80.</p> |
| Indicator | <p>FDIC Certificate Of Completion 🔑🔑</p> <p>The FDIC Money Smart program will issue a certificate for each topic successfully completed.</p> |
| Criterion | <p>Student Knowledge Increased Through FDIC Program Of Study For Project Connect 🔑</p> <p>At least 20 FDIC Certificates of Completion will be earned by Project Connect Students.</p> |
| Finding | <p>TRIO Project CONNECT Banking Course - Successful 🔑🔑</p> <p>A total of nine students participated in the Project Connect FDIC program over a six week period. One module was presented each week and a certificate for each module completed was issued to the students. Forty-six certificates were awarded: Introduction to Banking Services 9; Borrowing Basics 7; Selecting a Bank Account 8; Keeping a Bank Account 8; Tracking Your Money 7; Paying Yourself First 7.</p> |

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| Criterion | Student Knowledge Increased Through Outreach Program Of Study For Project Connect 🔑 At least 20 FDIC Certificates of Completion will be earned by Project Connect students. |
| Finding | TRIO Project CONNECT FDIC Certificate Program - Successful 🔑🔑 Students successfully completed the certificates. Of the nine students that participated, six students turned in surveys. 100% of the students rated the program and program length as being excellent and indicated that the program helped them understand their finances better. |
| Indicator | Student Money Management Center Certificate Of Completion - Train The Trainer 🔑 The SMMC will award a Certificate of Completion for the Train the Trainer program. |
| Criterion | Train The Trainer 🔑 At least 10 students will be certified by the SHSU Student Money Management Center Train the Trainer program. |
| Finding | Train The Trainer Program - Successful 🔑 Seventy-eight students participated in the College of Education Train the Trainer program. Of these seventy-eight students, twenty-eight successfully completed all of the requirements to receive a certificate indicating they had been trained in financial literacy. |
| Action | Survey Method & Delivery 🔑🔑 With regard to outreach, the scores regarding content, speaker and overall presentation are very high. However, students are leaving the open-ended question about naming one thing learned empty. In some cases, the students are filling in this item with their own name. The survey card needs to be restructured or a different method needs to be utilized to more accurately assess the items students are learning. The survey card can be restured to "check" the topic where something was learned and then the open-ended question can be placed with this checked box. Or, perhaps an electronic clicker can be utilized to indicate an item learned. This will be reviewed. In addition, the programs will be scheduled more deliberately in two ways: 1) leave adequate time for completing the survey; 2) the introduction and the speaker will indicate what should be learned; and 3) the close of the workshop will recap the items presented. |

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| Goal | Educational Personal Financial Coaching Services 🔑 The Student Money Management Center will provide effective personal finance counseling services to Sam Houston State University students. |
| Objective (L) | Increase Student Knowledge Of Personal Finance During One-on-One Financial Coaching Sessions 🔑 The Student Money Management Center's personal one-on-one financial coaching sessions will increase students' knowledge of personal finance related topics suggested by State of Texas Senate Bill 1590: budgeting, credit cards, spending, saving, loan repayment and consolidation, taxes, retirement planning, insurance, and financing of healthcare and other benefits. |
| Indicator | Financial Coaching Session Survey 🔑 The financial coaching session assessment results will serve as evidence of the successful completion of this objective. |
| Criterion | Student Knowledge Increased Through Peer Financial Coaching Sessions 🔑 At least 80% of students will be able to name at least one personal finance topic they learned during their one-on-one session with a Student Money Management Center Peer Financial Coach. This will demonstrate the effectiveness of the Center's peer financial coaching services on student learning. |
| Finding | Peer Coaching Sessions Met Objective 🔑 There were at total of 43 students who attended peer coaching sessions. Of these 43 students, 39 completed surveys. Of these 39 students, 100% learned personal financial information. Student count of one or more personal finance topics learned during peer financial coaching sessions: Budgeting: 32; Credit: 5; Investing: 3; Loans: 5; and Insurance: 2. |
| Criterion | Student Knowledge Increased Through Professional Financial Coaching Sessions 🔑 At least 80% of students will be able to name at least one personal finance topic they learned during one-on-one financial coaching sessions with a Student Money Management Center professional coach. This will demonstrate the effectiveness of the Center's professional money coaching services on student learning related to topics suggested by the State of Texas Senate Bill 1590: budgeting, credit cards, spending, saving, loan repayment and consolidation, taxes, retirement planning, insurance, and financing of healthcare and other benefits. |
| Finding | Professional Coaching Sessions Met Objective 🔑 There were a total of 266 students who attended financial coaching sessions with professional staff coaches. Of these 266 students, 214 completed surveys. Of these 214, 97% learned personal financial information. Student count of personal finance topics learned during professional coaching: Budgeting: 139; Investing:14; Loans: 81; and Credit: 10. |

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| Action | Improving Personal Financial Coaching  Staff was recently trained in percentage-based budgeting. In addition, a more specific method was structured to help students plan and set goals. This new information will be presented and a specific action plan will be given to students to help them implement their goals. Follow-up appointments will be scheduled to determine if students are able to successfully implement the plan. The goal is to check student level of success and persistence. |
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| Goal | Increase Awareness  The Student Money Management Center will continue to raise awareness of our services to the University Population. |
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| Objective (P) | Increase Microsessions  The Student Money Management Center will conduct at least 100 microsessions during the 2014/15 fiscal year. |
| KPI Performance Indicator | Titanium Software- Microsessions  The Student Money Management Center will utilize the Titanium software to measure the quantity of microsessions during the 2013/14 fiscal year. |
| Result | Microsession Goal Met  The Student Money Management Center conducted a total of 201 microsessions during the 2014/15 fiscal year. |
| Action | Microsessions Are Successful; Topic Expansion  The microsessions have been succesful. Some of the microsessions have been to help students understand their financial aid package or how to remain eligible for their financial aid. Additional topics need to be identified that will strategically bring in additional students. Some students may not have financial aid. Coaching, workshop and classroom surveys need to be carefully reviewed to glean additional topics that might bring students into the center for financial coaching. |

Previous Cycle's "Plan for Continuous Improvement"

As a result of the outreach and classroom presentations, the majority of students who attended were able to indicate at least one specific piece of information they learned by attending. However a weakness still exists in the Financial Literacy Week workshops. The first thing is that many students attend the workshops that do not complete surveys. Also, student knowledge reported does not indicate an increase in personal financial literacy. A new card will be developed which is not as lengthy to complete; but, which still indicates knowledge is gained. In addition, another method will be reviewed for confirming student attendance at the

end when collecting survey data. There were also some speakers that were not able to speak at the last moment. The SMMC will ensure back-up presentations are in place in case unexpected situations arise (i.e. speaker no-shows). The SMMC will also implement a new process for speaker selection to ensure quality information.

Please detail the elements of your previous "Plan for Continuous Improvement" that were implemented. If elements were not implemented please explain why, along with any contextual challenges you may have faced that prevented their implementation.

A new survey card was designed and implemented. However, this form will continue to be amended to ensure accurate data can be captured quickly. In addition, the position of moderator will be added to indicate speaker segment is nearly ended. This will ensure that time is left for students to complete the survey before they leave for class. Workshops will be enhanced with workshop objectives and recaps for objectives learned screenshots as well as more interactive activities to reinforce learning.

Plan for Continuous Improvement - Please detail your plan for improvement that you have developed based on what you learned from your 2014 - 2015 Cycle Findings.

Means for capturing level of student learning and topic of learning needs to be reviewed. In addition, marketing through microsessions needs to be further developed. Topics that resonate with the student body need to be further identified so that additional students can be reached.

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