

Money Management Center  
Assessment Plan Summary

Money Management Center

Educational Personal Finance Outreach

Goal Description:

The Student Money Management Center will provide effective personal financial outreach programming.

RELATED ITEMS/ELEMENTS -----

RELATED ITEM LEVEL 1

Increase Student Knowledge Of Personal Finance Through Outreach Programming

Learning Objective Description:

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.

RELATED ITEM LEVEL 2

Program Assessment Surveys

Indicator Description:

The program assessment results for specified activities will serve as evidence of the successful completion of this objective.

Attached Files

 [Speaker Survey Card](#)

Criterion Description:

Student Knowledge Increased Through Classroom, Workshop and FLW Outreach

Students who attend classroom presentations, organization workshops, and Financial Literacy 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.

Findings Description:

There were a total of 35 classroom presentations. Of the 780 students in attendance, 760 students completed the survey. Of the 760 students surveyed, 91.84% 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: 523; Credit:49; Loans: 87; Retirement Planning: 1; and Investing: 37.

There were a total of 37 workshops. Of the 1208 students in attendance, 1077 students completed the survey. Of the 1077 students surveyed, 88.77% 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: 649; Credit:64; Loans: 124; Insurance: 44 and Investing: 47.

Per event tracking, 684 students were in attendance for Financial Literacy Week. Of these students, 592 completed the survey. Of the 592 students surveyed 95.15% 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: 339; Loans: 83; Investing: 73; Retirement Planning: 6; Insurance: 27; Credit: 25; and Healthcare: 39.

RELATED ITEM LEVEL 3

Continue Outreach

Action Description:

Continue to conduct outreach through the avenues of classroom presentations, workshops and Financial Literacy Week.

RELATED ITEM LEVEL 2

Student Money Management Center Certificate Of Completion - Train The Trainer

Indicator Description:

The Student Money Management Center will award a Certificate of Completion for the Train the Trainer program.

**Criterion Description:**

At least 10 students will be certified by the Student Money Management Center Train the Trainer program.

**Findings Description:**

Eighty-six students participated in the College of Education Train the Trainer program. Of these eighty-six students, thirty-two successfully completed all of the requirements to receive a certificate indicating they had been trained in financial literacy.

RELATED ITEM LEVEL 3

**Broaden the Train-The-Trainer Program**

**Action Description:**

Increase outreach though the Train-the-Trainer program by inviting additional groups on campus to participate.

**Educational Personal Financial Coaching Services**

**Goal Description:**

The Student Money Management Center will provide effective personal finance counseling services to Sam Houston State University students.

RELATED ITEMS/ELEMENTS -----

RELATED ITEM LEVEL 1

**Increase Student Knowledge Of Personal Finance During One-on-One Financial Coaching Sessions**

**Learning Objective Description:**

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.

RELATED ITEM LEVEL 2

**Financial Coaching Session Survey**

**Indicator Description:**

The financial coaching session assessment results will serve as evidence of the successful completion of this objective.

Attached Files

 [Coaching Survey Card](#)

**Criterion Description:**

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.

**Findings Description:**

There were a total of 228 students who attended financial coaching sessions. Of these 228 students, 228 completed surveys. Of these 228, 97% learned personal financial information. Student count of personal finance topics learned during professional coaching: Budgeting: 122; Investing:4; Loans: 88; Insurance: 2 and Credit: 4.

RELATED ITEM LEVEL 3

**Increase Consultation Numbers**

**Action Description:**

In the future, the Student Money Management Center will include additional criterion. The intent will be the same - to keep the level of learning at 80% or above; however, we plan to increase the number of budgeting and student loan consultations to 200 per topic.

**Increase Awareness**

**Goal Description:**

The Student Money Management Center will continue to raise awareness of our services to the University Population.

RELATED ITEMS/ELEMENTS -----

RELATED ITEM LEVEL 1

**Increase Microsession**

**Performance Objective Description:**

The Student Money Management Center will conduct at least 100 microsessions during the 2015/16 fiscal year.

RELATED ITEM LEVEL 2

**Titanium Software - Microsessions**

**KPI Description:**

The Student Money Management Center will utilize the Titanium software to measure the quantity of microsessions during the 2015/16 fiscal year.

**Results Description:**

The Student Money Management Center conducted a total of 137 microsessions during the 2015/16 fiscal year.

Attached Files

**Objective Met**

**Action Description:**

This objective has been met and is now part of the Student Money Management Center daily routine. This objective has now been set aside to focus on other objectives.

**Update to Previous Cycle's Plan for Continuous Improvement**

**Previous Cycle's Plan For Continuous Improvement (Do Not Modify):**

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.

**Update of Progress to the Previous Cycle's PCI:**

Overall, the program met its goals; however, there remains areas for improvement. One item that needs to be reviewed is the percentage number of total students that are reached through the program. The programming and consultations are strong; but, plans need to be developed to reach more students.

**Timely and Relevant Programing**

**Closing Summary:**

The Student Money Management Center will strive for continuous improvements in outreach by deliberately and intentionally providing timely and relevant programing to the student population though the avenues of workshops, classroom presentations and Financial Literacy Week. Other improvements will focus on implementing hands-on learning opportunities, building the Train-the-Trainer program and increasing the number of one-on-one coach sessions in the topics of budgeting and student loans.