

Fogelman College of Business and Economics

Certificate in Financial Analysis (FIR) – Learning Outcomes & Assessment

General Description:

The Financial Analysis and Planning Graduate Certificate is designed for students interested in acquiring theoretical and practical financial knowledge and skills consistent with 21st century organizational needs and financial industry careers. The certificate program satisfies the need for learning about professional career opportunities for future success in financial certification exams such as CFA exam or CFP exam or a terminal degree in Finance.

Assessment Framework:

Program Learning Goal #1 (PLG1):

Students completing the Fogelman Financial Analysis Certificate will possess both theoretical and practical financial knowledge and skills consistent with 21st century organizational needs.

Measured Learning Outcome #1 (MLO1):

Students will demonstrate an understanding and application of time value of money and concepts of advanced capital budgeting.

Measured Learning Outcome #2 (MLO2):

Students will demonstrate an understanding and application of time value of investments and portfolio management.

Program Learning Goal #2 (PLG2):

Students completing the Fogelman Financial Analysis Certificate will be able to successfully pursue industry careers in the field of finance.

Measured Learning Outcome (MLO):

Students will be prepared to take certification exams such as the CFA exam, the CFP exam, Series 66 exam, etc.

Collecting Assessment Data:

For assessment of PLG1, data for both MLOs will be collected from Financial Analysis Certificate students enrolled in sections of FIR-7155 and FIR-7410. Student work to be used for assessing skills will consist of assigned questions in the final exam of each course. For assessment of PLG2, the same measurements used for PLG2 under the MSBA in Finance will be used to assess PLG2 for this graduate certificate.

Benchmarks for Assessment:

For each MLO assessed, individual students will be assigned a score of 1 (Fair), 2 (Good), or 3 (Exemplary) and then aggregated across the entire pool of assessed students. Any given MLO with an aggregate of 10% or greater scored at the Fair (1) level will be considered to have not met our benchmark for that MLO and flagged for discussion and corrective activities.