Minutes and Evaluation Report for
Audit & Review Face-to-Face Meeting
University of Wisconsin-Whitewater
Accounting Major & Minor BBA, 2012-2013

Date: Wednesday, May 8, 2013
Time: 11am - noon
Place: Hyland Hall Room 3303

Attendance: Provost Beverly Kopper; Associate Provost Greg Cook; Dean Chris Clements; Department Chair Alka Arora; faculty and staff in the program Linda Amann, Joe Gerard, Robert Gruber, Lynn Hafemeister, Meifang Liang, Carol Normand, Joanna Stradinger, Bill Tatman (by conference call); Audit & Review Chair Joan Littlefield Cook; Audit & Review team members Lois Smith and SA Welch.

1) Call to order & introductions.

2) Joan Cook summarized strengths of the program, including the fact that enrollment continues to grow and that there is a strong demand for program graduates. The program also offers excellent opportunities for students, including award-winning student organizations, a successful internship program, a Learning Community (*Calculated Careers*), and excellent community service opportunities (e.g., Low Income Tax Clinic, Volunteer Income Tax Assistance; VITA program participation can be counted as an elective in the accounting curriculum). In addition, the program has strong ties to regional firms that generously support student scholarships, and the faculty are successful in obtaining grants. The program has continued to work on developing its plan for assessment of student learning outcomes.

3) Department Chair Alka Arora commented on program strengths, noting the program's growing enrollments, strong Learning Community, and its successful internship program which serves about 100 students each year. She also noted that the program is proud of its outreach work with area high schools, as well as the research productivity of program faculty. Dr. Arora noted that the program is undergoing significant changes in personnel. Three new faculty members have been hired to start in Fall 2013, including one who will serve as department chair. There will be three additional searches in the 2013-2014 academic year, and two faculty members are retiring. One challenge is that recruitment of new faculty is difficult given the current job market—there are four jobs for every applicant on the market, which makes it difficult to compete for top candidates. Dr. Arora also noted that while the program welcomes the increases in student enrollment, faculty also want to ensure that class sizes do not become too large. They plan to address this by asking for an additional tenure line. Dr. Arora and Dean Clements both indicated that accreditation of the Accounting program separate from the overall college accreditation has been considered but put on hold due to staffing issues, but that it is in the long-term plan for the program.

4) Discussion of Review Team's evaluation:
    a) Assessment: The review team recommended further development and implementation of the program's assessment plan, particularly the development of a comprehensive long-term plan to assess all student learning outcomes over time, and clear articulation of how the data are used to impact the program. In the meeting, the program chair and faculty indicated that they use data from several sources when making changes to the program and to course content. For example, results from the DQP analyses and LEAP projects are being considered and used to make changes to classroom exercises, exams, and homework assignments. Data from college-level AOL assessments are given to course coordinators and are also considered when making changes to courses. Results from the CPA exam are discussed by program faculty and by the Accounting Advisory Board to identify strengths and weaknesses in UWW students, as compared to students from other institutions, and to recommend changes to the program. Finally, the program requires that students take a comprehensive exam for the BBA and the MPA degrees, which generates a great deal of data. With respect to program student learning outcomes (SLOs), the program has worked to align their SLOs with those of LEAP and of the college. They recently adopted a revised set of

SLOs for the BBA degree that are consistent with LEAP, particularly in that they are more skill-based than previous learning outcomes. The program also uses an adaptation of Bloom's taxonomy to categorize questions on the CPA exam, which serves as a capstone related to the outcomes of each course in the curriculum.

b) <u>Staffing</u>: It appears that staffing issues are becoming more problematic. There was discussion of this issue and possible ways to address it. Dr. Arora reported that the pool of applicants in this field is small, particularly with respect to minority candidates, and it is difficult to compete with positions that offer lighter teaching loads. The program has used a variety of strategies to attract candidates, including having personal conversations with colleagues at other institutions as well as leaving ads in place for as long as 6 months in an effort to catch candidates who are leaving other institutions. These efforts seem to have helped since three of the four searches in the 2012-2013 year resulted in new hires.

c) <u>DQP update</u>: The department participated in the DQP project during the 2012-2013 academic year. Thus far, the faculty have discussed the DQP model in relation to the LEAP ELOs. They have begun to consider how the results of the data collected as part of the DQP project (i.e., the campus-wide assessments of general knowledge, writing, information literacy, and critical thinking as well as the department's curricular analysis) can be used to modify classroom activities, exams, and homework assignments. In general at this point, the faculty prefer the LEAP structure to that of the DQP, and changes to curriculum, student learning outcomes, and classroom practices have been more influenced by LEAP.

5) **Recommended Actions**: The evaluation report (below) lists one recommended action, concerning assessment, to emphasize in the next full self-study.

6) **Recommended Result**: Continue with minor concerns.
   - Please make use of the detailed comments in the evaluation report (below).
   - The Accounting Department participated in the "Learning by Degrees" campus improvement project for HLC accreditation during 2012-2013. This project involved extensive assessment of student learning related to outcomes in the Lumina Degree Qualification Profile (DQP), department reflection on how their curriculum aligns with the DQP, and feedback on the DQP framework. It is agreed that the department's report for the DQP project can be submitted in lieu of their next undergraduate self-study (due in 2017-2018), per Dean John Stone (accreditation project Chair), Greg Cook (Associate Vice Chancellor for Academic Affairs), and Alka Arora (Accounting Department Chair). The next full self-study is due Fall 2022.

7) Adjourn.

Summary Review Report
University of Wisconsin-Whitewater
Committee Form: Review of Audit & Review Self-Studies
Undergraduate Programs, 2012-2013
Majors/Minors and Standalone Minors

Program__Accounting_____   Major___X_____   Minor___X_____

Evaluations submitted by: Jo Burkholder, Joan Cook, Rowand Robinson, Lois Smith, SA Welch
Review meeting attended by: Joan Cook (Chair), Rowand Robinson, Lois Smith, SA Welch

I.   Program Purpose & Overview

A. Centrality

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. The program contributes to the fulfillment of UW-Whitewater's core values, Mission, and Strategic Plan.			5
2. The program supports general education, proficiency, and/or other programs at UW-W.		5	
3. The program has achieved or is appropriately working toward achievement of at least two goals of Inclusive Excellence.	2	3	
4. The program has been responsive to actions recommended from the previous Audit and Review Report; Progress Reports have been submitted, if relevant.		3	2

Comments:

#1
- Each section has a clearly stated response, including specifically addressing the University goals, the core values, mission, and the Strategic Plan.
- Like their codes of conduct

#2
- Contributes to proficiency offerings in CoBe, and to the university DQP intiative.

#3
- IE work needs to begin.
- The self-study indicated that additional focus must be placed here. Some efforts are planned/intended (pg. 14), but the program hasn't really started anything yet.
- How does testing promote LEAP or IE goals? They have committees to address, but no forward progress on these goals as yet.

#4
- The report shows a great deal of material that could use more summarization. For example, the annual reports could be summarized and highlighted into one document. It's difficult to process the detail across several years with the original documents.
- The last A&R asked for more detail on student assessment. To what extent do these speeches show students the results of their work and where they need improvement? Is the presentation detailed enough to share the information beyond CPA generalized results?
- The department is engaged in the Lumina DQP project.
- Provide current numbers of faculty across diversity categories, but do not address how these represent change since the last review. Their 61% female 'department members' appear to include ADAs or other 'staff'. All full professors are white males, NO female professors hold rank of full professor.
- The "assessment criteria" listed for each change don't seem to include any of the quantitative data.37-41). Difficult to tell which specific data the changes are based on.
- Recs regarding plan to share data and working with HR were more clearly addressed.

B. Program Mission, Goals, & Accomplishments

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. The program's mission statement reflects the nature and scope of the program.			5
2. Goals and objectives were identified and undertaken to improve or advance the program.			5

3. The program has a process for setting and assessing goals, and/making decisions about changes to the program goals.		1	4
4. The program is considering potential revisions to mission, goals, or objectives; the program has a "vision" for where it wants to be in the future and how to get there.		1	4
5. The program achieved or maintained accreditation (if applicable) and/or earned recognition or awards.		1	4
6. The program has achieved program-level accreditation or has considered seeking it, where appropriate.		3	2

Comments:

#4
- Mission statement was revised in the review period.

#5
- The major has AACSB accreditation as part of the College of Business & Economics.
- I see pre-accreditation but not accreditation.

#6
- The Accounting Department has considered seeking separate accreditation, but has decided against this path in the short-term due to staffing levels.
- Excellent student scholarship awards – impressive.
- Good recruitment of female faculty.

II. Assessment: Curriculum & the Assessment of Students' Learning

A. Curriculum

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. The program has a clearly articulated, efficient, and purposeful curriculum, including options or emphases within the program (if applicable).			5
2. If program offers dual-listed courses, the expectations of graduate students differ from undergraduate students; otherwise NA.		4	1
3. Appropriate assessment data were used in making curricular revisions.	2		3
4. The program provides opportunities for students to learn in ways that extend beyond the classroom, and discussed the extent to which students are involved in these activities and opportunities.			5
5. Online courses are evaluated in ways that ensure effective delivery, continuous improvement, and student learning (if applicable).		NA	

Comments:

#1
- For curricular revisions, what student performance data outside of simple grade point averages were used? Can the department provide more evidence?
- Like the section on preparing for the class (ACCT 451/651)

#2
- Is a 4-5 page paper really sufficient for the graduate component of dual-listed courses?

- The existence of graduate requirements does not explain how they are different from the undergrad requirements
- (37) "Explore" two of the five…."—what does 'explore' mean? "Encouraged to develop"—what exactly are grad students required to do that's above UG students' expectations?

#3

- Difficult to tell what *data* were used to make the changes listed. Some qualitative data are referred to, but were there other sources used too (e.g., student performance on an outcome measure? On the MPA exam?)? [Exception: pg 40—use of survey data, although this is a national survey, not one of UWW students or faculty.] The statement on pg 41 is too vague to really assess the extent to which data the program has collected are being considered and used in making changes.

#4

- Strong internship/community service projects.
- Internship program; VITA Program; LITC Program (area of strength for the department)
- Anything beyond internships for outside of classroom? Saw club activities but are they linked to a specific class?
- Abundant opportunities
- 42-55. Strong opps for students (strong internship program; VITA program; LITC program; student orgs; LC)

#5

- Need to clearly indicate that there are no online courses
- Did not find specific mention of on-line assessment, though assessment data is abundant.

B. Assessment of Student Learning

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. The program has clearly articulated learning outcomes for students, courses are "mapped" to these learning outcomes, and some outcomes received specific attention during the review period.		4	1
2. Student learning outcomes are aligned with the LEAP Essential Learning Outcomes in a way that is reasonable and meaningful.		5	
3. The program has an appropriate assessment plan for measuring students' progress in attaining the outcomes.		4	1
4. The program collected a variety of appropriate assessment data allowing judgments about the extent to which students are achieving learning outcomes.	1	3	1
5. Program faculty consider assessment data in making changes to the curriculum, students' learning outcomes, and/or other aspects of the program.	1	3	1
6. Results of assessment efforts have been shared with appropriate internal and external constituencies.	1	3	1

Comments:

#1

- The LOs listed in the Assurance of Learning (AOL) plan (pg 56+) seem different from the LEAP ELOs identified on pg 131, and from the department ones listed in Appendix I. How are these all related?
- In the AOL plan, what are the "traits"? I need more information to be able to understand the relationship between the AOL LOs, the LEAP LOs, and the department LOs.

#2

- It would be helpful to show a master table for LEAP outcomes and the curriculum rather than showing each course separately.

- The evidence for closing the loop is not clear. Were curricular changes actually based on student outcomes?
- How does Appendix D set of LEAP goals correspond to Appendix I BBA goals? Can they be mapped together?
- How do data beginning on page 56 affect teaching or the curriculum? What do the data show?
- Report struggling to incorporate LEAP and IE, but they are doing it.

#3
- MPA is for grad students? How does this relate to UG LOs? Clarify how many students go on to take the MPA as a proportion of all accounting majors.

#4   Clarify that the AOL data (pg 56+) are *college*, not department data.

III. Student Recruitment, Enrollment, Retention, and Graduation

A. Trend Data

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1-2. Five-year enrollment and graduation trends reflect program vitality and sustainability.	1	1	3
3. [Majors Only] Credits-to-degree show that students can complete the degree in four years, or reasonably efficiently.	1		4
4-5. [Majors Only] Program has strategies to recruit and retain diverse students. Composition of students approximates or exceeds the diversity of students at the University.		1	4
6. Students can enroll in appropriate courses and proceed without delaying graduation.	1		4
7. Claim that the program is oversubscribed, undersubscribed, or at optimum level is justified or supported by examples or data.		1	4

Comments:

#1
- Is the growth too fast to manage? The SCH/FTE is very high.
- Program enrollment continues to grow.

#3
- Even though credits to degree are high, those numbers are understandable because of the 150-credit requirement for the CPA exam.
- Average credits-to-degree seem appropriate.

#4-5
- Are there any recruitment strategies/efforts targeting women? Ethnic minorities? Seems that these groups are underrepresented, as compared to UWW percentages.

#7
- To effectively meet the needs of the growth in the department, additional staffing seems necessary.

B. Demand for Graduates

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. [Majors Only] Placement information indicates that program			5

	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
graduates find employment or continue their education.			
2. Data suggests that employment opportunities for graduates of this program will remain strong.			5
3. The program systematically tracks graduates of the program.		1	4

Comments:

#1
- Very impressive placement rates.

#3
- Great outreach to various constituencies; may need additional focus on tracking graduates in a systematic manner.
- Nice job on tracking graduates
- Clearly have close contact with many alums, but the exact method for tracking is unclear.
- It may not be the department's responsibility to do this.

C. Comparative Advantage(s)

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. The program has unique features that distinguish it from competing programs—giving it a competitive edge.		3	2

Comments:
- Internship programs are important.
- What students think is good about the program is clear, but not how this compares to other programs

IV. Resource Availability & Development

A. Faculty Characteristics

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. Information is provided about the composition of the department faculty & instructional academic staff (e.g., gender, ethnicity, expertise, academic rank, etc.).			5
2. Context is clear for understanding the expectations regarding faculty and staff support of the program.		1	4
3-4. The program has identified staffing changes and anticipated areas of potential future need.			5

Comments:

#3-4
- The large number of open faculty positions will be difficult to staff. Recruiting appears to be a challenge.

B. Teaching & Learning Enhancement

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence

1. Faculty & instructional academic staff are engaged in activities to enhance teaching and advising.			5
2. The context is clear for understanding expectations for faculty & instructional academic staff to enhance their teaching and advising.		2	3

Comments:

#1
- A full professor seems to be missing from table 2 and no development activities are listed for the full professors, whereas others in the program list several activities each over the review period.

#2
- While the faculty engage in numerous enhancement activities, the specific expectation has to be inferred. It would be helpful if it were explicitly described.
- Assume that table data on student evaluations is based on a 5-point scale suggesting that faculty are maintaining a high standard, but expectations are not specific.

C. Research & other Scholarly/Creative Activities

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. Faculty (and staff, if relevant) are active in research and/or scholarly or creative activities.		1	4
2. The context is clear for understanding faculty engagement in scholarly/creative activity.	1	1	3

Comments:

#1
- Two Fulbright Scholarships is impressive

#2
- No explanation why some faculty are omitted or what research and scholarly expectations are
- It would be useful to differentiate the two groups of faculty in this program (academically qualified and professionally qualified), explain what this means, and describe the different expectations for these two groups for research/scholarly activities.

D. External Funding

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. Faculty and staff (if relevant) pursue funding through grants, contract, and/or gifts.		1	4
2. The context is clear for understanding faculty expectations for attracting grants, contracts, and/or gifts.	2		3

Comments:

#1
- Strong grant funding.

#2
- Only one active grant writer (also one of the Fulbright fellows) and no understanding of what expectations are for faculty
- LITC grant not included in table

- As for item C above, it would be useful to differentiate the two groups of faculty in this program (academically qualified and professionally qualified), explain what this means, and describe the different expectations for these two groups for research/scholarly activities.

E. Professional & Public Service

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. Faculty (and staff, if relevant) are active in professional and public service, beyond the department.			5
2. The context is clear for understanding faculty engagement in professional and public service in ways that benefit internal and external constituencies.	1	1	3

Comments:

F. Resources for Students in the Program

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. The program has adequate personnel, student help, and service and supplies to serve its undergraduate students.		2	3

Comments:
- The major seems over-subscribed.

G. Facilities, Equipment, & Library Holdings

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. The program has adequate facilities, equipment, and technological resources to effectively serve its students.		1	4

Comments:
- Area of strength.

V. Conclusions and Recommendations from the Department or Program

Criterion	Patterns of Evidence		
	No/Limited Evidence	Some/Partial Evidence	Sufficient Evidence
1. Program strengths are discussed.			5
2. Areas of improvement and continued progress are discussed.			5
3. Recommendations and resources are discussed.			5

4. Other comments by program (not rated)	----	----	----

Comments:
- I have personal concerns over the phrase "cultural purifications are often necessary". This might be seen as tactful, but given the social history of such phrases, this seems a bad way to say – there has been a lot of turnover in leadership due to retirements
- Pg. 106: As the program goes through its internal curricular review, please make sure to include data on student learning outcome achievement as you make revisions.

Strengths of the Program:
- Large demand for graduates
- Growing enrollments
- Strong student organizations and internship program
- Excellent grant funding
- The program is a strong one that supports the mission of the university and of CoBE. The quality of the program is better reflected in the current audit and review report.
- Strong curriculum

Areas for work or improvement:
- Mapping of LEAP outcomes to major outcomes doesn't appear to have occurred.
- Showing specific student performance data related to LEAP outcomes and department outcomes along with how that data affected curriculum or teaching needs to be provided.
- Need for more tenure-track faculty.
- Continue to refine your assessment programs and pursue independent accreditation when appropriate staffing levels are achieved.
- Need to attract and retain new faculty and perhaps limit admission to the program if a sufficiently large staff cannot be maintained.
- Clearly articulate the information that is communicated to stakeholders (e.g., students, Advisory Board).

Other comments/questions:
Regarding the faculty recruitment issue, it seems that clearer articulation of expectations for research, professional development, and outside service may be needed. The level of service seems high and it sounds like the expectation for active research and publication is escalating. Combined with high FTEs this would appear to be a difficult environment to which to attract new hires in a competitive environment.

Recommended Actions:
1. Continue to develop and implement the assessment plan
- Clarify learning outcomes for the major and how these align with LEAP ELOs and campus Inclusive Excellence goals. Consider developing a matrix to show these relationships.
- Clarify how/when each department student learning outcome is addressed with direct and/or indirect data. That is, what is the overall, longer-term assessment plan?
- Gather and analyze student performance data. Clearly indicate how these data affect curriculum or teaching.

Recommended Result:
_____ Insufficient information in the self-study to make a determination; revise self-study & resubmit.
_____ Continuation without qualification.
__X__ Continuation with minor concerns.

_____ Continuation with major concerns in one or more of the four areas; submit annual progress reports to the College Dean & Associate Vice Chancellor for Academic Affairs on progress in addressing the major concerns.

_____ Withhold recommendation for continuation, place on probation, and require another complete Audit & Review self-study within 1-3 years, at the Committee's discretion.

_____ Withhold recommendation for continuation, place on probation, recommend placing in receivership within the college, and require another complete Audit & Review self-study within 1-3 years at the Committee's discretion.

_____ Non-continuation of the program.

*The next full self-study is due 2017-2018. The Accounting Department participated in the "Learning by Degrees" campus improvement project for HLC accreditation during 2012-2013. This project involved extensive assessment of student learning related to outcomes in the Lumina Degree Qualification Profile (DQP), department reflection on how their curriculum aligns with the DQP, and feedback on the DQP framework. It is agreed that the department's report for the DQP project can be submitted in lieu of their next self-study (due in 2017-2018), per Dean John Stone (accreditation project Chair), Greg Cook (Associate Vice Chancellor for Academic Affairs), and Alka Arora (Accounting Department Chair).