

*2018 Annual Indirect Assessment*  
**Graduate Degree Program:  
Graduate Survey Results**

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# Contents

Introduction .....	3
Method.....	3
Survey Results .....	4
Student Program Information .....	4
Experience in the Program .....	6
Knowledge, skills, and personal development .....	6
Student Relationships .....	8
Satisfaction with the Program and College .....	10
Employment Information .....	11
Educational Background.....	14
Demographic Information .....	15
Appendix: Survey Questions .....	18

## Introduction

Although the College distributes evaluations to collect information on individual courses and instructors, the Office of Institutional Research and Effectiveness (OIRE) felt it would be beneficial to obtain the opinions of the master's graduates regarding the programs as a whole. This survey focuses on bigger picture items such as graduates' prior learning experience, if they felt the program provided applicable skills for their career, and their relationships with faculty, staff, and the other graduates. The primary objectives of this survey include learning why graduates selected the College, how well the College contributed to their learning experience, their connection with other graduates and faculty, and overall satisfaction with the graduate degree program. Knowing how students feel about these topics will assist the College with developing ways to provide the best possible learning experience for students.

## Method

Approximately 1-2 weeks after the end of each graduate degree program term, a survey link within the graduate audit e-mail is sent to graduates by the Registrar. The findings in this report are only representative of those graduates who had an interest in completing the survey. Participants were asked to respond to several of the items on a Likert-type scale ranging from 1 to 5 in order to calculate the mean scores. Items that use a different range are noted above the respective tables within the document. In addition, graduates are able to provide comments regarding their course(s), instructor(s), materials, support staff, and the technology. A total of 27 responses out of 80 graduates (33.8%) were collected in 2018. Detailed tables within this report break down specific items regarding student relationships, faculty and staff relationships, and satisfaction with the program and College. A summary of the tables is provided for each category.

## Survey Results

Table 1

<i>Number of Respondents for each term</i>						
	<b>1801</b>	<b>1802</b>	<b>1803</b>	<b>1804</b>	<b>1805</b>	<b>Total</b>
Total number of graduates	15	15	15	11	24	<b>80</b>
Number of respondents	5	5	6	3	8	<b>27</b>
<b>Response percentage</b>	<b>33.3%</b>	<b>33.3%</b>	<b>40.0%</b>	<b>27.3%</b>	<b>33.3%</b>	<b>33.8%</b>

### Student Program Information

All of the graduates who responded were enrolled in the Personal Financial Planning major (100.0%) which is the result of a fair number of students who completed the CFP® professional education program through the College and articulated those courses toward the Personal Financial Planning major.

Table 2

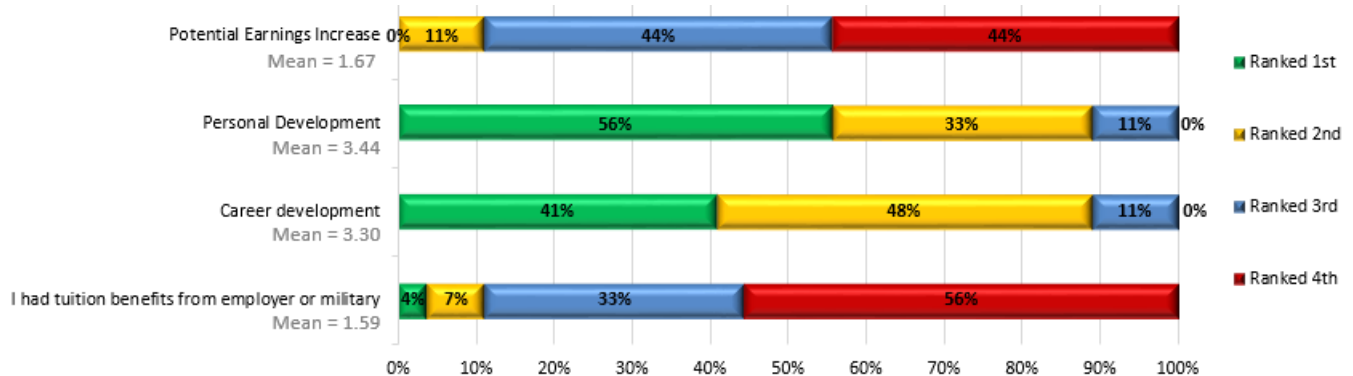
<i>Please indicate your major in the Graduate Degree Program:</i>						
	<b>1801</b>	<b>1802</b>	<b>1803</b>	<b>1804</b>	<b>1805</b>	<b>Total</b>
Personal Financial Planning	5 100.0%	5 100.0%	6 100.0%	3 100.0%	8 100.0%	<b>27</b> <b>100.0%</b>
Finance	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>0</b> <b>0.0%</b>
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

Table 3

<i>What certificates did you earn while pursuing your graduate degree? (select all that apply)</i>						
	<b>1801</b>	<b>1802</b>	<b>1803</b>	<b>1804</b>	<b>1805</b>	<b>Total</b>
Personal Financial Planning Certificate	4 80.0%	1 20.0%	5 83.3%	2 66.7%	4 50.0%	<b>16</b> <b>59.3%</b>
Financial Analysis Certificate	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>0</b> <b>0.0%</b>
None	1 20.0%	4 80.0%	1 16.7%	1 33.3%	4 50.0%	<b>11</b> <b>40.7%</b>
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

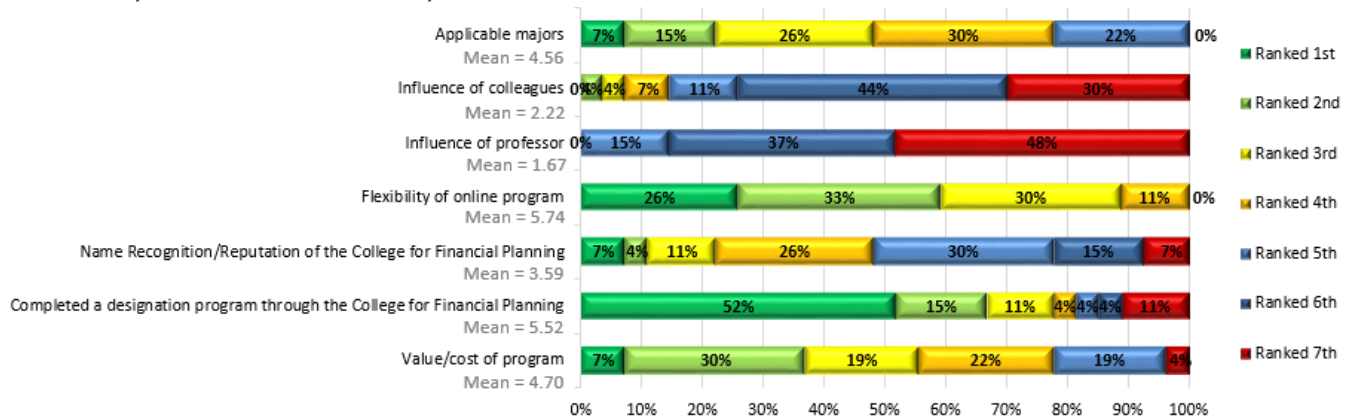
Graduates are asked to rank four reasons as to why they decided to earn a graduate degree with 1 being the primary reason to 4 being the last. To more easily determine which options graduates are selecting, the rankings were assigned numeric values, as follows, to calculate a mean score: Ranked 4<sup>th</sup> (1.00), Ranked 3<sup>rd</sup> (2.00), Ranked 2<sup>nd</sup> (3.00), Ranked 1<sup>st</sup> (4.00). Out of the four available reasons for enrolling in a graduate degree program, the highest percentages for the first two choices were 56% of recent graduates ranked *personal development* 1<sup>st</sup> and *career development* was ranked 2<sup>nd</sup> by 48% of respondents.

Figure 1. Rank your reasons for why you decided to earn a graduate degree (1 = most important reason, 4 = least important reason)



Graduates are asked to rank seven reasons as to why they selected the College for Financial Planning with 1st being the primary reason and 7th being the last. To more easily determine which options graduates are selecting, the rankings were assigned numeric values, as explained above. Out of the seven available reasons provided, the highest percentages for the first two choices showed that 52% of recent graduates ranked *completed a designation program through the College* 1<sup>st</sup> and *flexibility of online program* was ranked 2<sup>nd</sup> by 33% of respondents.

Figure 2. Rank your reasons for choosing the College for Financial Planning for your graduate degree (1 = most important reason, 7 = least important reason)



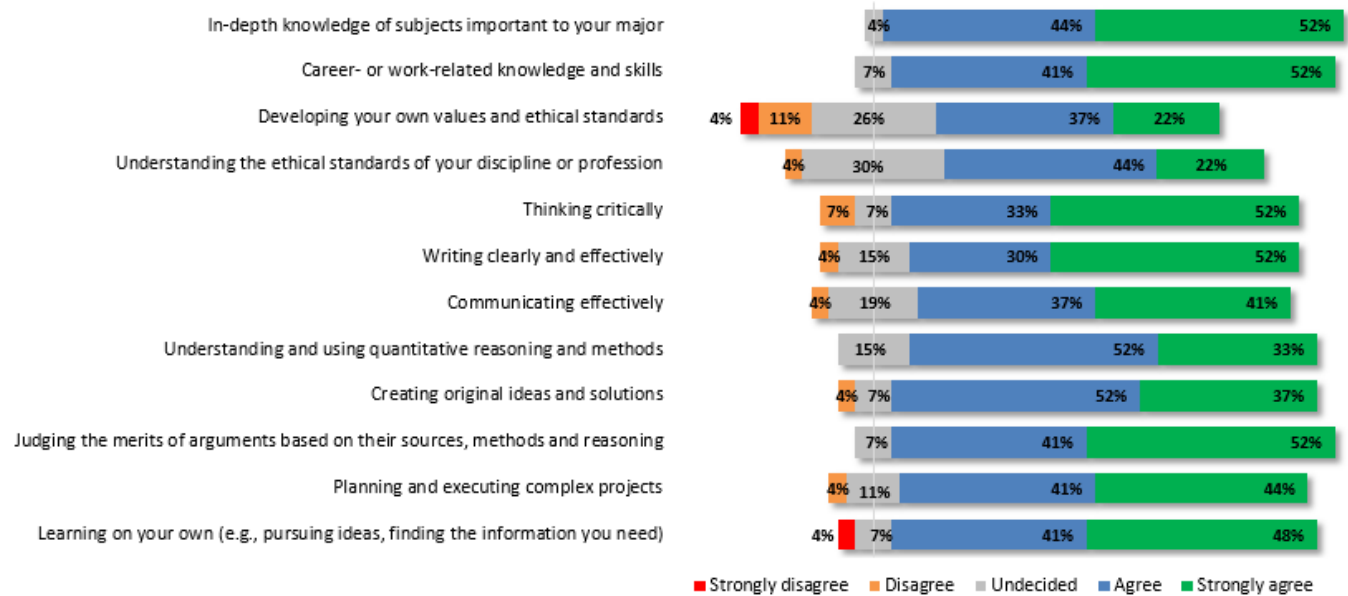
## Experience in the Program

Figure 3 shows frequencies and Table 4 shows mean scores and standard deviations for the question, "To what extent has your experience as a graduate student at the College for Financial Planning contributed to your knowledge, skills, and personal development in the following areas?"

### Knowledge, skills, and personal development

Graduates rated the following items related to ethical standards among the lowest *Developing your own values and ethical standards* (M=3.63) and *Understanding the ethical standards of your discipline or profession* (M=3.85) showing that either more emphasis could be made in that area or graduates felt as though they did not learn anything new relating to ethical standards.

Figure 3



**Table 4.** To what extent has your experience as a graduate student at the College for Financial Planning contributed to your knowledge, skills, and personal development in the following areas? (1 – None to 5 – Very much)

	N	1801		1802		1803		1804		1805		2018	
		M	SD	M	SD	M	SD	M	SD	M	SD	M	SD
In-depth knowledge of subjects important to your major	27	4.40	0.55	4.60	0.55	4.50	0.55	4.00	1.00	4.63	0.52	<b>4.48</b>	<b>0.58</b>
Career- or work-related knowledge and skills	27	4.60	0.55	4.60	0.55	4.50	0.55	4.00	1.00	4.38	0.74	<b>4.44</b>	<b>0.64</b>
Developing your own values and ethical standards	27	3.40	1.52	3.20	0.84	4.17	0.75	3.00	1.00	3.88	1.13	<b>3.63</b>	<b>1.08</b>
Understanding the ethical standards of your discipline or profession	27	3.80	0.84	3.40	0.89	4.17	0.75	3.33	0.58	4.13	0.83	<b>3.85</b>	<b>0.82</b>
Thinking critically	27	4.80	0.45	4.00	1.22	4.17	0.98	3.33	1.15	4.63	0.52	<b>4.30</b>	<b>0.91</b>
Writing clearly and effectively	27	4.80	0.45	4.20	1.30	4.17	0.98	3.67	1.15	4.38	0.52	<b>4.30</b>	<b>0.87</b>
Communicating effectively	27	4.80	0.45	3.80	1.10	4.17	0.98	3.00	0.00	4.38	0.52	<b>4.15</b>	<b>0.86</b>
Understanding and using quantitative reasoning and methods	27	4.60	0.55	4.00	0.71	4.00	0.63	3.33	0.58	4.50	0.53	<b>4.19</b>	<b>0.68</b>
Creating original ideas and solutions	27	4.40	0.55	4.20	0.84	4.33	0.52	3.33	1.15	4.38	0.74	<b>4.22</b>	<b>0.75</b>
Judging the merits of arguments based on their sources, methods and reasoning	27	4.60	0.55	4.40	0.55	4.33	0.82	4.00	1.00	4.63	0.52	<b>4.44</b>	<b>0.64</b>
Planning and executing complex projects	27	4.60	0.55	3.80	1.30	4.33	0.82	4.00	0.00	4.38	0.74	<b>4.26</b>	<b>0.81</b>
Learning on your own (e.g., pursuing ideas, finding the information you need)	27	4.40	0.55	3.80	1.79	4.17	0.75	4.33	0.58	4.63	0.52	<b>4.30</b>	<b>0.91</b>

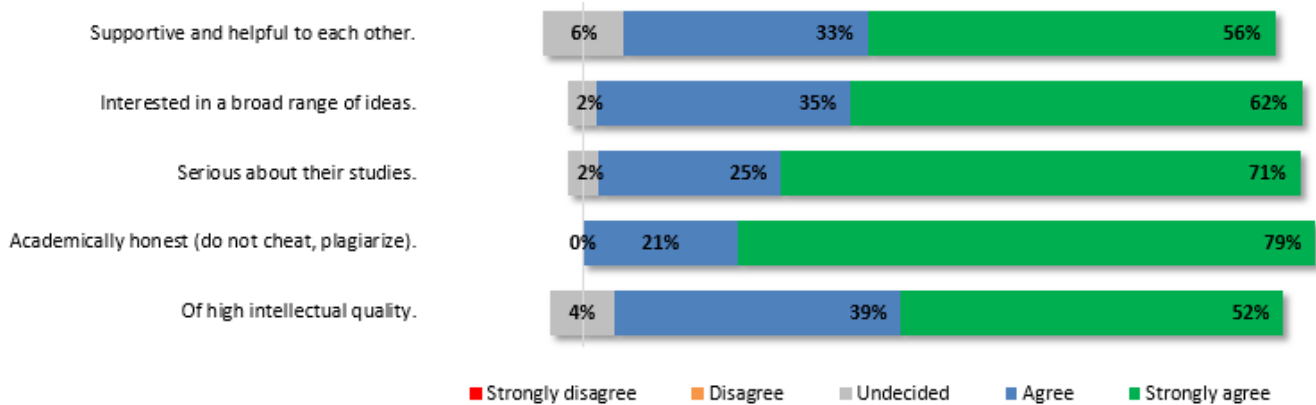
## Student Relationships

Table 5 shows how graduates perceive the graduate students at the College, which is likely based on their interactions with others in the discussion threads as well as their opinion of themselves. The highest rated items are *Academically Honest* ( $M=4.79$ ) and *Serious about their studies* ( $M=4.67$ ).

**Table 5.** Graduate students at the College for Financial Planning are: (1 – Strongly disagree to 5 – Strongly agree)

	N	1801		1802		1803		1804		1805		2018	
		M	SD	M	SD	M	SD	M	SD	M	SD	M	SD
Supportive and helpful to each other in meeting the academic demands of the program.	27	4.60	0.89	4.40	0.55	4.83	0.41	5.00	0.00	3.88	0.64	4.44	0.70
Interested in a broad range of ideas.	26	4.40	0.89	4.80	0.45	4.67	0.52	4.67	0.58	4.43	0.53	4.58	0.58
Serious about their studies.	24	5.00	0.00	4.80	0.45	4.67	0.52	5.00	0.00	4.17	0.75	4.67	0.56
Academically honest (do not cheat, plagiarize).	19	5.00	0.00	5.00	0.00	4.83	0.41	5.00	0.00	4.40	0.55	4.79	0.42
Of high intellectual quality	23	5.00	0.00	4.25	0.96	4.83	0.41	4.00	0.00	4.00	0.63	4.43	0.66

**Figure 4**



The majority of graduates who responded to the survey indicated that they felt some sense of belonging when rating their relationship with other students. The rating scale options are from 1.00 = sense of isolation to 5.00 = sense of belonging.

**Table 6.** Thinking of your own experience, how would you rate your relationships with other students? (1 – Sense of isolation to 5 – Sense of belonging)

	N	1801		1802		1803		1804		1805		2018	
		M	SD	M	SD	M	SD	M	SD	M	SD	M	SD
Mean Score and Standard Deviation	27	3.60	1.14	3.40	0.89	4.17	0.41	3.67	0.58	3.00	1.41	3.52	1.05

**Figure 5**

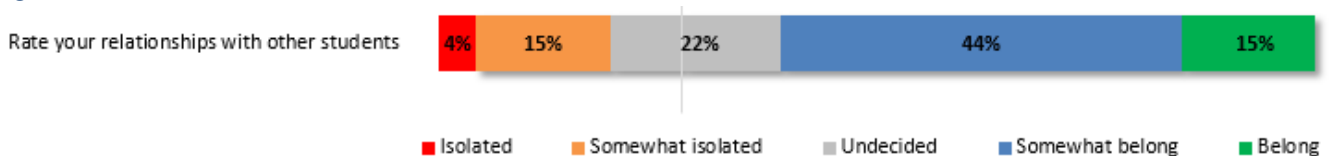


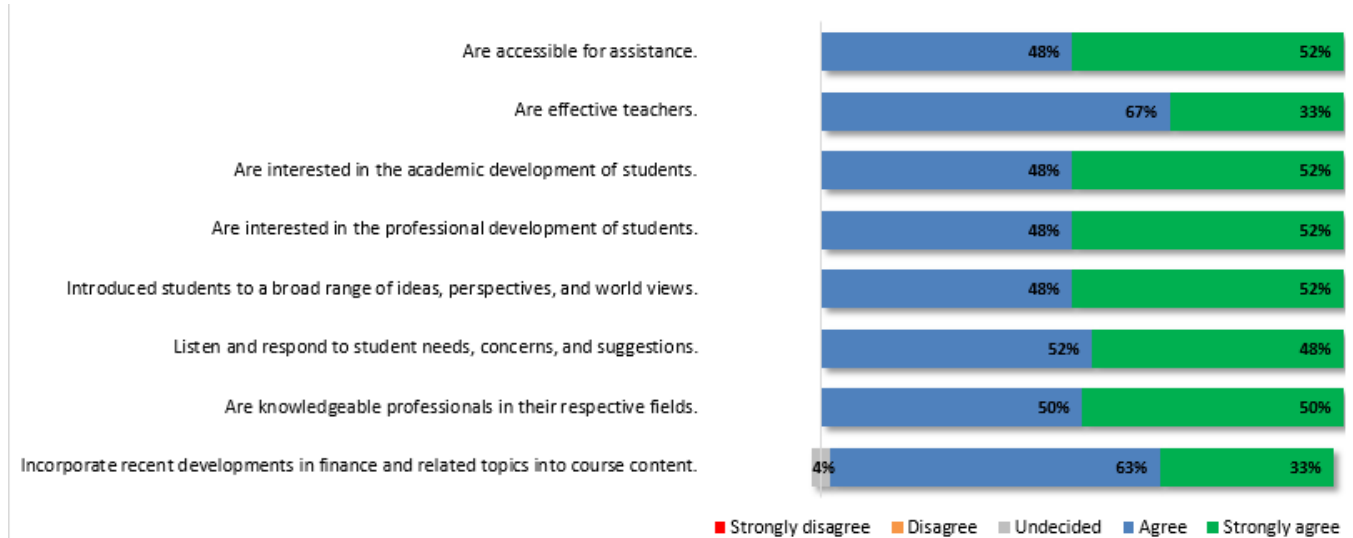


Table 7 and Figure 6 list several desired aspects of faculty and the ratings given by graduates.

*Table 7. Graduate program faculty at the College for Financial Planning: (1 – Strongly disagree to 5 – Strongly agree)*

	N	1801		1802		1803		1804		1805		2018	
		M	SD	M	SD	M	SD	M	SD	M	SD	M	SD
Are accessible for assistance.	27	4.40	0.55	4.40	0.55	4.50	0.55	5.00	0.00	4.50	0.53	4.52	0.51
Are effective teachers.	27	4.40	0.55	4.20	0.45	4.50	0.55	4.33	0.58	4.25	0.46	4.33	0.48
Are interested in the academic development of students.	27	4.20	0.45	4.60	0.55	4.83	0.41	4.67	0.58	4.38	0.52	4.52	0.51
Are interested in the professional development of students.	27	4.20	0.45	4.60	0.55	4.67	0.52	4.67	0.58	4.50	0.53	4.52	0.51
Introduced students to a broad range of ideas, perspectives, and world views.	27	4.40	0.55	4.60	0.55	4.83	0.41	4.33	0.58	4.38	0.52	4.52	0.51
Listen and respond to student needs, concerns, and suggestions.	27	4.20	0.45	4.40	0.55	4.67	0.52	4.67	0.58	4.50	0.53	4.48	0.51
Are knowledgeable professionals in their respective fields.	26	4.40	0.55	4.60	0.55	4.67	0.52	4.50	0.71	4.38	0.52	4.50	0.51
Incorporate recent developments in finance and related topics into course content.	27	4.20	0.45	3.80	0.45	4.67	0.52	4.33	0.58	4.38	0.52	4.30	0.54

*Figure 6. Graduate program faculty at the College for Financial Planning*



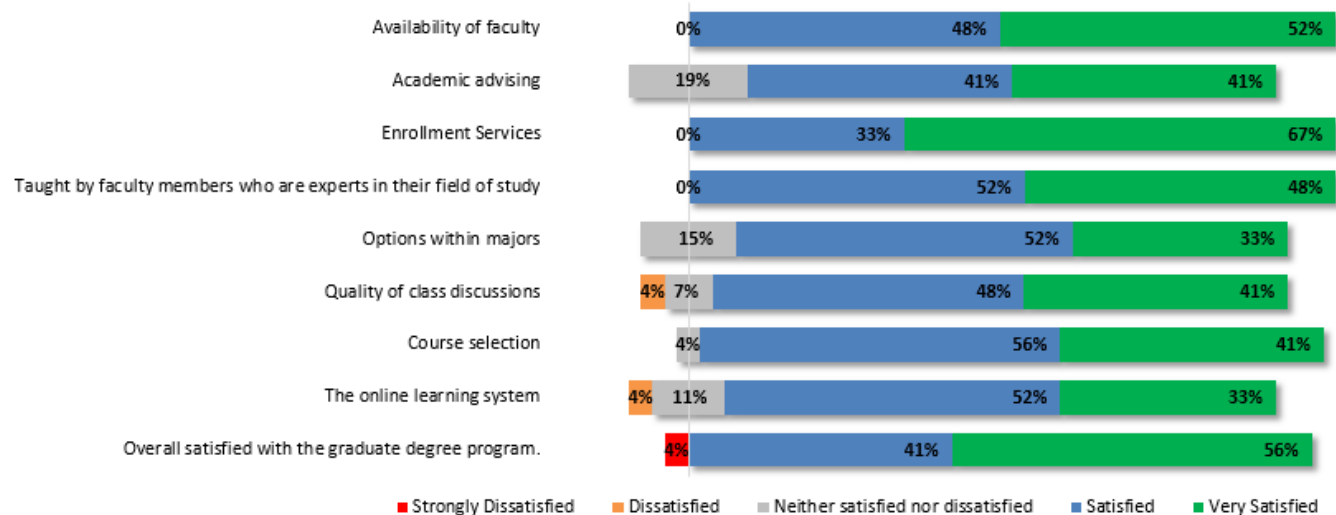
## Satisfaction with the Program and College

As can be seen in Table 8 and Figure 7, graduates are generally satisfied to very satisfied with the *Enrollment Services* (M=4.67) and the *availability of faculty* (M=4.52).

**Table 8.** Thinking about your entire graduate experience at the College for Financial Planning, how satisfied are you with each of the following? (1 – Very dissatisfied to 5 – Very satisfied)

	N	1801		1802		1803		1804		1805		2018	
		M	SD	M	SD	M	SD	M	SD	M	SD	M	SD
Availability of faculty	27	4.40	0.55	4.60	0.55	4.50	0.55	4.67	0.58	4.50	0.53	4.52	0.51
Academic advising	27	4.00	1.00	4.60	0.55	4.33	0.52	3.67	1.15	4.25	0.71	4.22	0.75
Enrollment Services	27	4.40	0.55	4.60	0.55	4.83	0.41	4.67	0.58	4.75	0.46	4.67	0.48
Opportunities to be taught by faculty members who are experts in their field of study	27	4.20	0.45	4.80	0.45	4.67	0.52	4.33	0.58	4.38	0.52	4.48	0.51
Options within majors	27	4.00	0.71	4.40	0.55	4.33	0.82	4.00	1.00	4.13	0.64	4.19	0.68
Quality of class discussions	27	4.40	0.89	4.40	0.55	4.50	0.55	4.00	1.00	4.00	0.93	4.26	0.76
Course selection	27	4.20	0.45	4.40	0.55	4.33	0.82	4.33	0.58	4.50	0.53	4.37	0.56
The online learning system	27	4.00	0.00	3.60	0.55	4.67	0.52	4.33	0.58	4.13	1.13	4.15	0.77
Overall, how satisfied have you been with your graduate education?	27	4.80	0.45	4.60	0.55	4.67	0.52	4.33	0.58	4.00	1.31	4.44	0.85

**Figure 7**



**Table 9.** Note that this is out of a high score of 4.00 (1 = Definitely No to 4 = Definitely Yes)

	N	1801		1802		1803		1804		1805		2018	
		M	SD	M	SD	M	SD	M	SD	M	SD	M	SD
Would you recommend the College for Financial Planning to others for graduate studies?	27	3.80	0.45	3.80	0.45	3.83	0.41	4.00	0.00	3.63	0.52	3.78	0.42
If you could start over again, would you still choose to enroll in this program?	27	3.80	0.45	3.60	0.55	3.83	0.41	4.00	0.00	3.63	0.52	3.74	0.45

## Employment Information

Table 10

Which of the following best describes your employment situation for the majority of your time while completing the program?

	1801	1802	1803	1804	1805	Total
Employed full time (30 or more hours per week)	5 100.0%	5 100.0%	6 100.0%	3 100.0%	8 100.0%	27 100.0%
Employed part time (less than 30 hours per week)	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Family and other caregiving	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Unemployed	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Other	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

Some graduates had a difficult time finding a balance between work, school, and other obligations ( $M=3.81$ ). Some of the comments suggest that giving time expectations and extending course length might assist with their ability to balance coursework with family and career time.

Table 11. During your graduate studies, you were able to find a balance between academic work, career and other obligations. (1 – Strongly disagree to 5 – Strongly agree)

	N	1801		1802		1803		1804		1805		2018	
		M	SD	M	SD	M	SD	M	SD	M	SD	M	SD
Mean score and Standard Deviation	27	4.00	1.00	3.60	1.14	4.17	0.41	2.67	2.08	4.00	0.93	3.81	1.08

Table 12

<i>Which of the following best describes the current state of your employment?</i>						
	1801	1802	1803	1804	1805	Total
For-profit corporation, company or group-practice	4 80.0%	4 80.0%	4 66.7%	3 100.0%	6 75.0%	21 77.8%
Self-employed in own business or professional non-group practice	0 0.0%	0 0.0%	1 16.7%	0 0.0%	0 0.0%	1 3.7%
Public institution or agency, including government, military or education	1 20.0%	1 20.0%	1 16.7%	0 0.0%	2 25.0%	5 18.5%
Not-for-profit corporation, company or group-practice	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Family and other caregiving	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Unemployed	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Other	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

Slightly over half (51.9%) of the College’s master’s graduates currently work in the Financial Planning industry.

Table 13

<i>Please indicate the principal industry in which you are currently employed.</i>						
	1801	1802	1803	1804	1805	Total
Financial Planning	2 40.0%	2 40.0%	4 66.7%	3 100.0%	3 37.5%	14 51.9%
Investment Planning	1 20.0%	2 40.0%	1 16.7%	0 0.0%	3 37.5%	7 25.9%
Securities	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Insurance	0 0.0%	1 20.0%	0 0.0%	0 0.0%	0 0.0%	1 3.7%
Banking	1 20.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 3.7%
Accounting / Taxes	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Education	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	1 3.7%
Other	1 20.0%	0 0.0%	1 16.7%	0 0.0%	1 12.5%	3 11.1%
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

**Other:**

- United States Navy
- Financial Services

Close to one-fourth to one-third of graduates have been working in their industry for the various time frames given: 0 to 5 years (29.6%), 6 to 10 years (22.2%), 11 to 15 years (33.3%), with a smaller proportion (14.8%) working more than 15 years, which may correspond to the wide range of students' ages given in the demographics section.

**Table 14**

<i>How many years have you been working in the industry in which you are currently employed?</i>						
	<b>1801</b>	<b>1802</b>	<b>1803</b>	<b>1804</b>	<b>1805</b>	<b>Total</b>
0 to 5	1 20.0%	1 20.0%	2 33.3%	1 33.3%	3 37.5%	<b>8</b> <b>29.6%</b>
6 to 10	2 40.0%	1 20.0%	1 16.7%	1 33.3%	1 12.5%	<b>6</b> <b>22.2%</b>
11 to 15	1 20.0%	2 40.0%	3 50.0%	1 33.3%	2 25.0%	<b>9</b> <b>33.3%</b>
More than 15	1 20.0%	1 20.0%	0 0.0%	0 0.0%	2 25.0%	<b>4</b> <b>14.8%</b>
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

**Table 15**

<i>What are your plans for employment after graduation?</i>						
	<b>1801</b>	<b>1802</b>	<b>1803</b>	<b>1804</b>	<b>1805</b>	<b>Total</b>
Have a job that will continue after graduation	5 100.0%	5 100.0%	5 83.3%	2 66.7%	8 100.0%	<b>25</b> <b>92.6%</b>
Have a job lined up to begin after graduation	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>0</b> <b>0.0%</b>
Will begin to look for a job	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>0</b> <b>0.0%</b>
Have a job but will begin to look for a new job	0 0.0%	0 0.0%	0 0.0%	1 33.3%	0 0.0%	<b>1</b> <b>3.7%</b>
Pursue additional graduate education	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>0</b> <b>0.0%</b>
Family and other caregiving	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>0</b> <b>0.0%</b>
Other	0 0.0%	0 0.0%	1 16.7%	0 0.0%	0 0.0%	<b>1</b> <b>3.7%</b>
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

**Other:**

- Will look for financial planning job after the Navy

## Educational Background

Prior to starting a master's program at the College for Financial Planning, a bachelor's degree is the highest level of education earned by 51.9% of the graduates. A few others (25.9%) had earned a post-bachelor's professional certification or another master's degree (18.5%) while only 3.7% had taken some graduate-level classes.

Table 16

<i>Prior to starting a Master's Program at the College for Financial Planning, your highest level of education was:</i>						
	1801	1802	1803	1804	1805	Total
Bachelor's Degree	5 100.0%	1 20.0%	4 66.7%	0 0.0%	4 50.0%	14 51.9%
Post-Bachelor's Professional Certification	0 0.0%	3 60.0%	1 16.7%	2 66.7%	1 12.5%	7 25.9%
Some Graduate-Level Classes	0 0.0%	0 0.0%	1 16.7%	0 0.0%	0 0.0%	1 3.7%
Master's Degree	0 0.0%	1 20.0%	0 0.0%	1 33.3%	3 37.5%	5 18.5%
JD	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
PhD	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

Table 17 shows that about one-fourth (25.9%) of the graduates had not previously taken distance learning education courses but the majority (74.1%) had taken at least one distance learning course.

Table 17

<i>Prior to starting a Master's Program at the College for Financial Planning, what number of distance learning courses had you completed:</i>						
	1801	1802	1803	1804	1805	Total
I had not taken a distance-learning course before	3 60.0%	1 20.0%	2 33.3%	0 0.0%	1 12.5	7 25.9%
1 to 3	1 20.0%	0 0.0%	0 0.0%	1 33.3	2 25.0%	4 14.8%
4 to 6	0 0.0%	1 20.0%	3 50.0%	2 66.7%	1 12.5%	7 25.9%
7 to 9	1 20.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	2 7.4%
More than 9	0 0.0%	3 60.0%	1 16.7%	0 0.0%	3 37.5%	7 25.9%
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

Almost half of the respondents used an employer sponsorship (48.1%) to pay for at least part of their graduate courses.

**Table 18**

<i>How did you finance your graduate education?</i>						
	<b>1801</b>	<b>1802</b>	<b>1803</b>	<b>1804</b>	<b>1805</b>	<b>Total</b>
Personal income	2 40.0%	1 20.0%	3 50.0%	0 0.0%	3 37.5%	<b>9</b> <b>33.3%</b>
Spouse/partner/other family income	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>0</b> <b>0.0%</b>
Private student loans	0 0.0%	1 20.0%	0 0.0%	0 0.0%	0 0.0%	<b>1</b> <b>3.7%</b>
Veteran's benefits	0 0.0%	1 20.0%	0 0.0%	0 0.0%	1 12.5%	<b>2</b> <b>7.4%</b>
Employer sponsorship	3 60.0%	1 20.0%	3 50.0%	2 66.7%	4 50.0%	<b>13</b> <b>48.1%</b>
Scholarship	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>0</b> <b>0.0%</b>
Other	0 0.0%	1 20.0%	0 0.0%	1 33.3%	0 0.0%	<b>2</b> <b>7.4%</b>
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

**Other:**

- I pay some and work pays some
- Personal & Employer

## Demographic Information

Tables 19-22 show that of the graduates who completed the demographic portion of the survey, 85.2% are white and 77.8% males. Graduates are located all across the country and vary widely in their age ranges.

**Table 19**

<i>Gender:</i>						
	<b>1801</b>	<b>1802</b>	<b>1803</b>	<b>1804</b>	<b>1805</b>	<b>Total</b>
<b>Male</b>	3 60.0%	5 100.0	5 83.3%	1 33.3%	7 87.5%	<b>21</b> <b>77.8%</b>
<b>Female</b>	2 40.0%	0 0.0%	1 16.7%	2 66.7%	1 12.5%	<b>6</b> <b>22.2%</b>
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

Table 20

<i>Race</i>						
	1801	1802	1803	1804	1805	Total
White/Caucasian	4 80.0%	5 100.0%	6 100.0%	2 66.7%	6 75.0%	23 85.2%
Black/African American	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	1 3.7%
Hispanic Non-White	1 20.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 3.7%
Hispanic White	0 0.0%	0 0.0%	0 0.0%	1 33.3%	0 0.0%	1 3.7%
Asian/Pacific Islander	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	1 3.7%
Native American	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
More than one ethnicity	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Prefer not to answer	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

Table 21

<i>What is your age-range?</i>						
	1801	1802	1803	1804	1805	Total
20 to 25	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	1 3.7%
26 to 30	0 0.0%	0 0.0%	0 0.0%	2 66.7%	0 0.0%	2 7.4%
31 to 35	0 0.0%	0 0.0%	4 66.7%	1 33.3%	2 25.0%	7 25.9%
36 to 40	0 0.0%	4 80.0%	1 16.7%	0 0.0%	2 25.0%	7 25.9%
41 to 45	0 0.0%	1 20.0%	0 0.0%	0 0.0%	2 25.0%	3 11.1%
46 to 50	1 20.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 3.7%
51 to 55	3 60.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	4 14.8%
56 to 60	1 20.0%	0 0.0%	1 16.7%	0 0.0%	0 0.0%	2 7.4%
61 to 65	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
66 to 70	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
71+	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>



Table 22

<i>In what state or U.S. territory do you live?</i>						
	<b>1801</b>	<b>1802</b>	<b>1803</b>	<b>1804</b>	<b>1805</b>	<b>Total</b>
Arizona	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	<b>1</b> <b>3.7%</b>
California	1 20.0%	1 20.0%	3 50.0%	0 0.0%	2 25.0%	<b>7</b> <b>25.9%</b>
Colorado	0 0.0%	1 20.0%	0 0.0%	1 33.3%	1 12.5%	<b>3</b> <b>11.1%</b>
Georgia	0 0.0%	1 20.0%	0 0.0%	0 0.0%	0 0.0%	<b>1</b> <b>3.7%</b>
Illinois	0 0.0%	1 20.0%	0 0.0%	0 0.0%	1 12.5%	<b>2</b> <b>7.4%</b>
Iowa	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	<b>1</b> <b>3.7%</b>
Massachusetts	1 20.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>1</b> <b>3.7%</b>
Michigan	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	<b>1</b> <b>3.7%</b>
Montana	0 0.0%	1 20.0%	0 0.0%	0 0.0%	0 0.0%	<b>1</b> <b>3.7%</b>
New Jersey	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	<b>1</b> <b>3.7%</b>
New York	0 0.0%	0 0.0%	1 16.7%	0 0.0%	0 0.0%	<b>1</b> <b>3.7%</b>
Ohio	3 60.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	<b>3</b> <b>11.1%</b>
Oregon	0 0.0%	0 0.0%	1 16.7%	0 0.0%	0 0.0%	<b>1</b> <b>3.7%</b>
Texas	0 0.0%	0 0.0%	1 16.7%	1 33.3%	0 0.0%	<b>2</b> <b>7.4%</b>
Virginia	0 0.0%	0 0.0%	0 0.0%	1 33.3%	0 0.0%	<b>1</b> <b>3.7%</b>
<b>Total</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>8</b>	<b>27</b>

## Appendix: Survey Questions

### Graduate Degree Graduation Survey

Thank you for taking the time to complete this survey by The College for Financial Planning. Your feedback is important in helping us work to continuously improve our programs and better serve our students. This survey should take no more than 10 minutes of your time. If you start the survey and cannot complete it in one sitting, you can continue the survey at a later time.

#### Page 1

1. **Your student ID number or name:** \_\_\_\_\_
2. **Please indicate your major in the Graduate Studies Program:**
  - Personal Financial Planning
  - Finance
3. **What graduate certificate(s) did you earn while pursuing your graduate degree? (select all that apply)**
  - Personal Financial Planning Certificate
  - Financial Analysis Certificate
  - Other (please specify)

#### Page 2 Reasons for Degree

4. **Rank your reasons for why you decided to earn a graduate degree (1=most important reason, 4=least important reason).**
  - Potential earnings increase
  - Personal development
  - Career development
  - I had tuition benefits from employer or military
5. **Rank your reasons for choosing the College for Financial Planning for your graduate degree (1=most important reason, 7=least important reason).**
  - Applicable majors
  - Influence of colleagues
  - Influence of professor
  - Flexibility of online program
  - Name recognition/reputation of the College for Financial Planning
  - Completed a designation program through the College for Financial Planning
  - Value/cost of program
6. **What other reasons, if any, did you have for choosing the College for Financial Planning for your graduate degree?** \_\_\_\_\_

#### Page 3 Knowledge, skills, and personal development

Please complete the following questions as they pertain to your experience as a graduate student with the College for Financial Planning.

7. **To what extent has your experience as a graduate student at the College for Financial Planning contributed to your knowledge, skills, and personal development in the following areas?**  
(None, Very little, Some, Quite a bit, Very much)
  - In-depth knowledge of subjects important to my major
  - Career- or work-related knowledge and skills
  - Developing your own values and ethical standards
  - Understanding the ethical standards of your discipline or profession

- Thinking critically
- Writing clearly and effectively
- Communicating effectively
- Understanding and using quantitative reasoning and methods
- Creating original ideas and solutions
- Judging the merits of arguments based on their sources, methods and reasoning
- Planning and executing complex projects
- Learning on your own (e.g., pursuing ideas, finding the information you need)

#### Page 4 Student Relationships

Please complete the following questions as they pertain to your experience as a graduate student with the College for Financial Planning.

#### 8. Graduate students at the College for Financial Planning are:

(Strongly Disagree, Disagree, Neither agree nor disagree, Agree, Strongly Agree, Can't Judge)

- Supportive and helpful to each other in meeting the academic demands of the program.
- Interested in a broad range of ideas.
- Serious about their studies.
- Academically honest (do not cheat, plagiarize).
- Of high intellectual quality.

#### 9. Thinking of your own experience, how would you rate your relationships with other students?

(1: Sense of Isolation, 2, 3, 4, 5: Sense of Belonging)

#### Page 5 Staff and Faculty

#### 10. Graduate program faculty at the College for Financial Planning:

(Strongly Disagree, Disagree, Neither agree nor disagree, Agree, Strongly Agree)

- Are accessible for assistance.
- Are effective teachers.
- Are interested in the academic development of students.
- Are interested in the professional development of students.
- Introduce students to a broad range of ideas, perspectives, and worldviews.
- Listen and respond to student needs, concerns, and suggestions.
- Are knowledgeable professionals in their respective fields.
- Incorporate recent developments in finance and related topics into course content.

#### 11. Thinking about your entire graduate experience with the College for Financial Planning, how satisfied are you with each of the following?

(Very dissatisfied, Dissatisfied, Neither satisfied nor dissatisfied, Satisfied, Very satisfied)

- Availability of faculty
- Academic advising
- Enrollment Services
- Opportunities to be taught by faculty members who are experts in their field of study
- Options within majors
- Quality of class discussions
- Course selection
- The online learning system

#### Page 6 Graduate student experience

Please complete the following questions as they pertain to your experience as a graduate student with the College

for Financial Planning.

**12. Overall, how satisfied have you been with your graduate education?**

- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied

**13. Would you recommend the College for Financial Planning to others for graduate studies?**

- Definitely Yes
- Probably Yes
- Probably No
- Definitely No

**14. If you could start over again, would you still choose to enroll in this program?**

- Definitely Yes
- Probably Yes
- Probably No
- Definitely No

**15. Please provide any further comments or suggestions regarding the graduate degree program.**

**Page 7 Work/Life Balance**

**16. Which of the following best describes your employment situation for the majority of your time while completing the program?**

- Employed full time (30 hours or more per week)
- Employed part time (less than 30 hours per week)
- Family and other caregiving
- Unemployed
- Other

**17. During your graduate studies, you were able to find a balance between academic work, career and other obligations.**

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

**18. What could the College have done to help you balance your academic work and your other obligations?**

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**Page 8 Employment and Education**

**19. Which of the following best describes the current state of your employment?**

- Self-employed in own business or professional non-group practice
- For-profit corporation, company or group-practice
- Public institution or agency, including government, military or education
- Family and other caregiving
- Unemployed [if selected, skips to question 23]
- Other (please specify) \_\_\_\_\_

**Page 9 Employment and Education**

**20. Please indicate the principal industry in which you are currently employed.**

- Financial Planning
- Investment Planning
- Securities
- Insurance
- Banking
- Accounting/Taxes
- Education
- Other (please specify) \_\_\_\_\_

**21. How many years have you been working in the industry in which you are currently employed?**

- 0 to 5
- 6 to 10
- 11 to 15
- More than 15

**22. What are your plans for employment after graduation?**

- Have a job that will continue after graduation
- Have a job lined up to begin after graduation
- Will begin to look for a job
- Have a job but will begin to look for a new job
- Pursue additional graduate education
- Family and other caregiving
- Other (please specify) \_\_\_\_\_

#### Page 10 Employment and Education

To better understand the students who successfully complete our graduate programs, please tell us a little about yourself. This information is voluntary, but it may help us better identify students who need additional support to succeed.

**23. Prior to starting a Master's Program at the College for Financial Planning, your highest level of education was:**

- Bachelor's Degree
- Post-Bachelor's Professional Certification
- Some Graduate-Level Classes
- Master's Degree
- JD
- PhD
- Other (please specify) \_\_\_\_\_

**24. Prior to starting a Master's Program at the College for Financial Planning, what number of distance learning courses had you completed:**

- I had not taken a distance-learning course before
- 1 to 3
- 4 to 6
- 7 to 9
- More than 9

**25. How did you finance your graduation education?**

- Personal income
- Spouse/partner/other family income
- Private student loans
- Veteran's benefits

- Employer sponsorship
- Scholarship
- Other (please specify) \_\_\_\_\_

#### Page 11 Demographics

To better understand the students who successful complete our graduate programs, please tell us a little about yourself. This information is voluntary, but it may help us better identify students who need additional support to succeed.

#### 26. Gender

- Male
- Female

#### 27. Race

- White/Caucasian
- Black/African American
- Hispanic Non-White
- Hispanic White
- American Indian or Alaska Native
- Asian/Pacific Islander
- Native American
- More than one ethnicity
- Prefer not to answer
- Other (please specify) \_\_\_\_\_

#### 28. What is your age-range?

- 20 to 25
- 26 to 30
- 31 to 35
- 36 to 40
- 41 to 45
- 46 to 50
- 51 to 55
- 56 to 60
- 61 to 65
- 66 to 70
- 71+

#### 29. Do you currently live in the U.S. or a U.S. territory?

- Yes
- No [if selected, skips to question 31]

#### Page 12 Location in U.S.

30. In what state or U.S. territory do you live? [skips to end]  
[drop-down]

#### Page 13 Location outside U.S.

31. In what country do you currently live? \_\_\_\_\_

#### Page 14 Thank You!

Thank you very much for your time. Your thoughts are important to us and we appreciate your insights. If you have any questions or would like to provide us with any additional feedback, please contact the Office of Institutional Research and Effectiveness at [cffpresearch@cftp.edu](mailto:cffpresearch@cftp.edu).

When you click the "Done" link below, your responses will be submitted.