

## Fiscal Responsibility Rubric

### Student Leader Learning Outcomes (SLLO) Project

Name of Student:

Date Completed:

| FISCAL RESPONSIBILITY OUTCOMES        | <u>NOVICE</u>   | <u>TRANSITION</u>           | <u>INTERMEDIATE</u>  | <u>TRANSITION</u>             | <u>ADVANCED</u>   |
|---------------------------------------|---|-----------------------------|--|-------------------------------|---|
|                                       | Awareness or Base Level Knowledge   | From Novice to Intermediate | Apply the concept somewhat   | From Intermediate to Advanced | Intentional and Effective Application   |
| <b>Integrity/<br/>Competence</b>      | <p>Does not think through the process</p> <p>Focuses on immediate needs not the correct process</p> <p>Does not recognize conflicts of interest in the process</p> <p>Inconsistent with following policies</p> <p>Has not received proper training</p> <p>Does not understand consequences of actions regarding fiscal matters</p> <p>Does not demonstrate understanding of policy and procedure</p>  |                             | <p>Follows the rules and policies they know</p> <p>Does not exhibit critical thinking for events they encounter</p> <p>Has received proper training, but regularly makes mistakes</p> <p>Able to identify some consequences of actions</p>   |                               | <p>Thinks through possible consequences for anything they are not familiar with</p> <p>Leads training sessions</p> <p>Critically thinks through consequences of actions</p> <p>Understands and follows policy and procedure</p>   |
| <b>Accountability/<br/>Disclosure</b> | <p>Does not understand the concept of "separation of duties"</p> <p>Does not understand why there is a need to be responsible to someone else</p> <p>Unfamiliar with fiscal concepts or processes</p> <p>Needs constant supervision</p> <p>Financial information they need to provide is not readily available</p> <p>Financial information is not reviewed or updated regularly</p> <p>Financial information they need to provide is not easy-to-understand</p> <p>Unable to answer questions regarding fiscal decisions of organization</p> |                             | <p>Understands why a separation of duties is important</p> <p>Understands why there is a need to be responsible to someone else</p> <p>Tries to follow the processes but is not necessarily successful</p> <p>Knows some processes but not others</p> <p>Needs some supervision and reassurance</p> <p>Financial information is periodically reviewed and updated</p> <p>Financial information is made available to a limited number of individuals</p> <p>Financial information is organized, but not necessarily simplified</p> <p>Able to monitor fiscal accounts, but does not exactly understand what needs to be done with the information</p> |                               | <p>Knows why there is &amp; how to accomplish a separation of duties and can teach others</p> <p>Regularly checks accounts &amp; inventory for accuracy and knows how to address issues of inaccuracy</p> <p>Performs continuous evaluation of processes and controls</p> <p>Minimal supervision and reassurance needed</p> <p>Financial information is offered and made available in multiple formats and venues</p> <p>Financial information is easy-to-understand</p> <p>Financial information is updated and reviewed regularly</p> <p>Can answer and justify all concerns and decisions regarding fiscal matters of organization</p> |

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|---|--|-----------------------------|---|-------------------------------|---|
|   | Awareness or Base Level Knowledge  | From Novice to Intermediate | Apply the concept somewhat  | From Intermediate to Advanced | Intentional and Effective Application   |
| <b>Efficiency/<br/>Funding Adequacy</b> | No knowledge of resources available within the organization<br>No knowledge of how resources can be used to meet organization's needs<br>Needs step-by-step guidance on procedures   |                             | Aware of available resources<br>May not understand how resources can be used to benefit the organization<br>Requires little personal guidance but still goes through a step-by-step process for procedures  |                               | Knows about available resources<br>Knows how to utilize resources for the benefit of the organization<br>Completes project without assistance<br>Is capable of generating more efficient ways to address the management of resources  |
| <b>Student Engagement</b>               | Does not understand how fiscal experiences within the organization can apply to other areas of life<br>Does not make decisions with regard to the organization as a whole<br>Low involvement in fiscal processes<br>Relies on peers and/or advisor to accomplish most of work<br>Does not differentiate from other organizations |                             | Is beginning to understand how skills learned in this area can transfer to other areas of life, but not all connections are made<br>Will make decisions with the immediate needs of the organization in mind, but does not consider long-term effects of decisions<br>Works with peers and/or advisors to accomplish responsibilities relating to fiscal matters<br>Able to address fiscal concerns relating to specific areas within organization, but does not have a grasp of the overall fiscal health of the organization<br>Understands diverse needs of the organization but does not know how the organization differs from other organizations |                               | Transferability of skills and concepts occurs for other areas of life<br>Achieves fiscal responsibilities at a high level<br>Long and short-term effects of fiscal decisions are considered<br>Has significant involvement in the fiscal process (creating budgets, monitoring spending, etc.)<br>Assists others with the development of fiscal policy<br>Considers diverse needs of the organization and how the organization differs from other organizations |

**COMMENTS:**