

# Research on the Reform of the Process-Tracking Ideological and Political Assessment System in Applied Universities: Taking the Personal Finance Course as an Example

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**Abstract:** Using the Xi'an Mingde Institute of Technology students as the teaching object and the Personal Finance course as an example, we explore the reform of the ideological and political assessment system of process-tracking courses in applied universities. The article analyzes the feasibility of applying the curriculum ideological and political assessment system in college courses and compares the traditional assessment system. It also proposes that applying curriculum ideological and political assessment to the college curriculum assessment system will help improve students' understanding of the "value guidance" in curriculum ideological and political education and enhance the teaching effect.

**Keywords:** Curriculum ideological and political education; Teaching reform; Curriculum assessment

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## 1. Situation analysis

### 1.1. Course assessment research background for ideological and political majors

The "Notice of the Ministry of Education on Issuing the Guidance Outline for Ideological and Political Curriculum Construction in Colleges and Universities" (2020) <sup>[1]</sup> clearly states: "Professional courses are the basic carrier of ideological and political curriculum construction." Therefore, the teaching content of professional courses must carry out a comprehensive and overall sorting out and in-depth excavation so as to achieve better ideological and political education effects <sup>[2]</sup>. Combining career development with ideal education is important in moral education in colleges and universities. However, the current evaluation system for professional courses focuses more on examining knowledge learned in theory and practical teaching. It lacks an examination of students' future career plans, professional ethics, and accomplishments that they may engage in in their future lives and work. How to build a professional teaching evaluation system for professional courses in colleges and universities is a major issue that needs to be solved urgently.

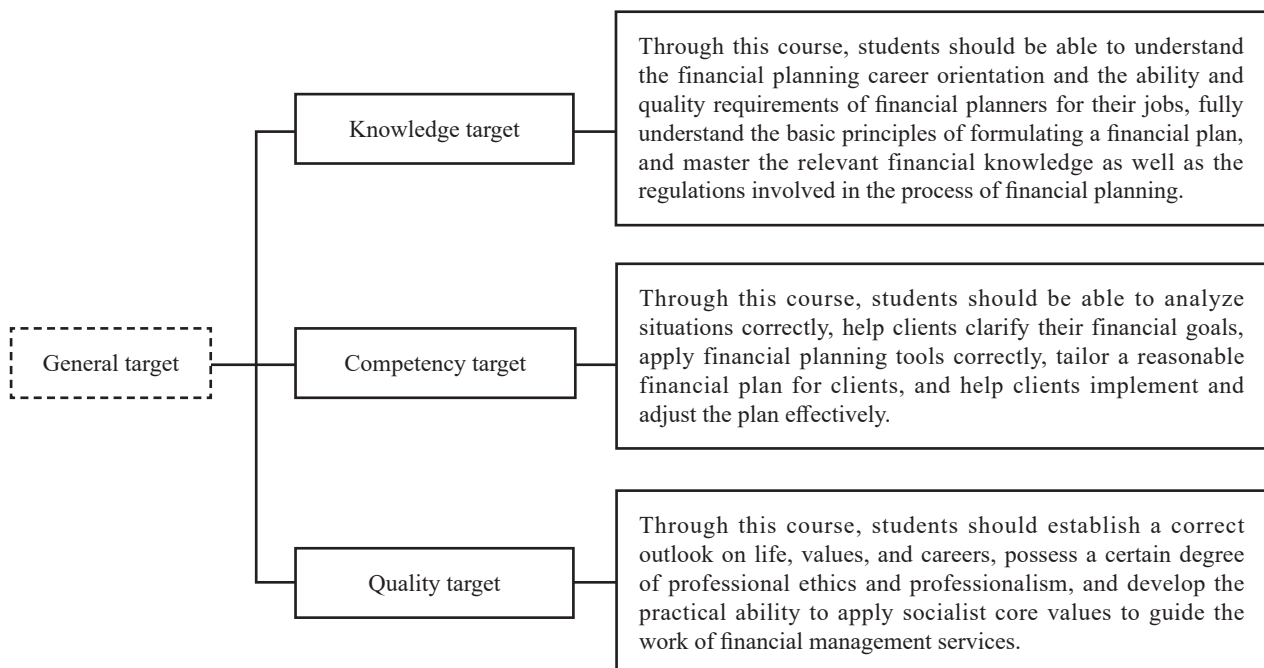
In response to this problem, this study intends to use Xi'an Mingde Institute of Technology as the teaching

object and the Personal Finance course as a case to carry out innovative reforms to the ideological and political assessment system of college courses to improve students' understanding of "value guidance" in the ideological and political courses, and the acceptance and positive evaluation of this content.

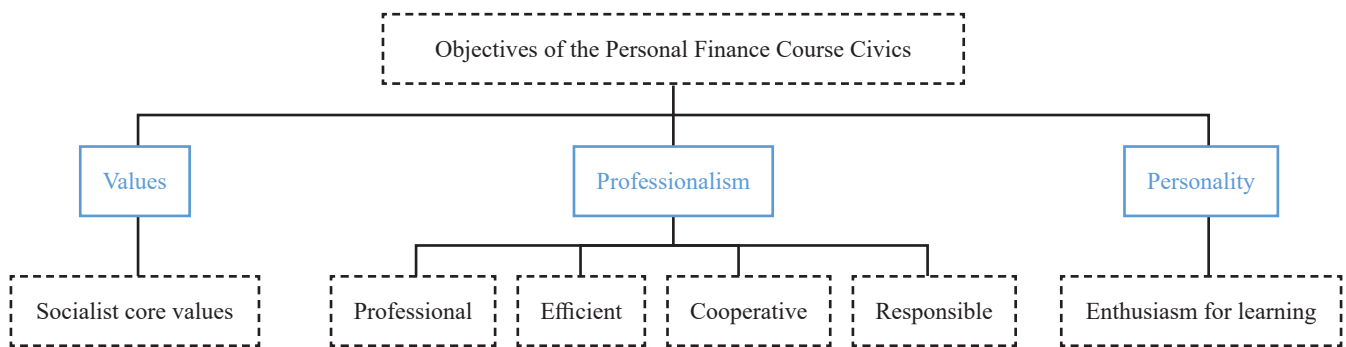
## 1.2. Personal Finance course positioning and goals

"Personal Finance" is a professional course for students majoring in finance in colleges and universities. It is a "certificate-in-one" course based on the Financial Qualification Examination and the Financial Planner AFP Practice Certificate [3]. It mainly targets customers' financial management positions, including financial managers, financial consultants, and financial markets. This course is designed to enable students to learn financial management knowledge and become proficient in professional skills in financial management tools and other aspects and apply these professional skills to the specific practice of financial management to provide customers with better financial consulting and other services in the future [4].

This study is task-led and uses "action-oriented-ideological and political integration" as the strategy. It not only tests students' mastery of course theory but also improves students' practical application abilities. The course objectives are shown in **Figure 1**, and the ideological and political goals of the course are shown in **Figure 2**. This study focuses on the teaching content of Personal Finance courses, designs comprehensive teaching content consistent with values, and refines it so that it runs through the entire ideological and political process of the course and can better meet the goals of innovative course teaching talent training, and meet the needs of the financial industry talent market [5].



**Figure 1.** Personal Finance course objectives



**Figure 2.** Ideological and political goals of Personal Finance courses

## 2. Status quo of the course assessment system

### 2.1. “Technically biased” assessment system

The current subject examinations mainly focus on students’ knowledge and ability of the courses. Driven by “utilitarianism” and the original evaluation system, most students in this course aim at “learning” and “finishing a course” as the ultimate goal, hoping to obtain credits and pass the exam. The current course assessment and evaluation system does not reflect the true values, does not focus on cultivating students’ professional qualities, and cannot achieve the teaching effect of ideological and political courses <sup>[6]</sup>.

### 2.2. Rigid assessment method

The assessment content of Personal Finance courses mainly involves students’ values and career outlook, etc. It is mainly based on daily homework, and closed-book examinations focus more on testing their memory skills and cannot test whether students have established correct values <sup>[7]</sup>. It is precise because examining values infiltrates subjective factors such as feelings and understanding, which greatly complicates the ideological and political work of courses focusing on “value guidance” <sup>[8]</sup>. At the same time, although in the previous teaching reform, the ideological and political curriculum has incorporated value assessment into the teaching process, there has been no detection and supervision of the ideological and political effects of the curriculum at each stage of teaching, making it difficult for students to learn in the classroom. In the process, feedback is provided on teaching ideological and political courses.

## 3. Research methods

This project deeply analyzes the characteristics of the Personal Finance course at Xi’an Mingde Institute of Technology. On this basis, combined with the actual situation of financial management and other industry teaching in Chinese universities, it explores the reform method of the ideological and political assessment system based on process tracking. Based on the content of the Personal Finance course, the ideological and political content of the course is integrated into each stage of teaching, and the professional course process-tracking assessment system is innovated. Process-tracking assessment refers to the periodic assessment of students’ learning enthusiasm, learning attitude, and learning behavior during the course implementation process and the periodic testing and recording of differences and changes in non-intellectual factors and other aspects <sup>[9]</sup>. It is mainly used to monitor and evaluate the formation process of students’ cognitive and practical skills throughout the course learning process. This reform of the assessment method is conducive to stimulating students’ enthusiasm for learning and improving their independent learning and innovation capabilities and

practical operation skills, thus greatly improving learning efficiency <sup>[10]</sup>.

In addition, using a process-tracking ideological and political assessment system can effectively provide feedback on the effectiveness of each teaching stage. Based on “class tracking,” “practice tracking,” and “thought tracking” as the main clues, and using “behavior guidance-idea integration” as the teaching method, a diversified “whole-process evaluation system” is established. With the help of an intelligent teaching platform, the specific effectiveness of “value guidance” in the entire course teaching process can be effectively monitored, and the evaluation results can be fed back to students and teachers in real-time so that teachers can timely adjust teaching content and teaching progress based on the evaluation results. It can also improve the effectiveness of integrating course content and ideological and political education <sup>[11]</sup>. In addition, based on the design of teaching methods and the reform of teaching content, a set of evaluation criteria for the integration of ideological and political courses is formulated, and the proportion of ideological and political courses in the evaluation indicators of this subject is increased to improve students’ understanding of the ideological and political courses. The attention and enthusiasm for integrating politics into teaching can better play the role of the process-tracking ideological and political assessment system <sup>[12]</sup>.

#### 4. Specific reform implementation

The evaluation and assessment system based on process tracking can detect and provide feedback in real-time on students’ mastery of their professional knowledge and values. Therefore, it can improve the teaching effect of ideological and political courses, allowing teachers and students to conduct courses on time based on feedback and adjust content and progress <sup>[13]</sup>. Based on the expected effects of combining ideological and political courses with Personal Finance course teaching (**Table 1**), all stages of the course, including before class, during class, and after class, are tracked and assessed to implement the reform of the entire course ideological and political assessment system.

**Table 1.** The expected effect of integrating ideological and political education into Personal Finance courses

Teaching unit	Key points of teaching	Ideological and political points of the course	Teaching integration	Expected effect of teaching
Introducing the content of personal financial planning and the career of a planner	Financial planning motivation and professional ethics	Compliance with laws and regulations; professional quality and ethics; correct interpretation of justice and benefit	The bank’s excellent service case display and class discussion	Students understand the importance of establishing correct professional ethics; they can accurately judge violations of laws and regulations.
Evaluating customer family information.	Family life cycle assessment, customer financial management values assessment	Financial management values in line with socialist core values	Scenario simulation, classroom discussion	Students understand financial management values and can convey correct values to “extreme” customers and make them agree.
Preparing and analyzing client family financial statements	Household financial statement preparation and analysis	Be conscientious, efficient, and compliant	Case presentation, classroom discussion, and analysis	Students can accurately point out non-compliant behaviors in the financial evaluation process; and can correctly understand the importance of complying with standards.
Individual goal planning	Individual goals planning, such as savings, housing, and insurance	Establishing professional qualities of rigorous, pragmatic, and sincere service	Scenario simulation of the communication process with customers; developing a customer-centered concept	Students gain the ability to correctly judge non-compliance in business processes; and the ability to correctly complete various planning processes based on cases.
Comprehensive financial planning	Completion of the writing of comprehensive financial planning plans with the knowledge learned.	Establishing professional quality	Completing real customer cases and understanding the necessary professional qualities in the financial services industry	Students are able to learn from simulation activities the necessary professional qualities and service awareness as a financial planner in financial management.

#### 4.1. Assessment and tracking of the entire teaching process

- (1) Pre-class session: Teachers should integrate ideological and political elements of the curriculum into the preparation process of online educational resources, especially the included course materials, extracurricular expansion reading materials, and teaching mind maps. Teachers need to develop teaching materials based on the specific situation of each chapter and their teaching progress and upload them to the online learning platform. Learning tasks can be put on the platform to facilitate students' previewing and preparation in advance. In addition, students' pre-class learning can also be scored based on their learning performance and data fed back by the teaching platform, to give students a more comprehensive understanding of the current political situation and cultivate a correct outlook on life and values.
- (2) During the lesson: Firstly, students' learning attitude and enthusiasm are judged based on class attendance. Secondly, by appropriately increasing the proportion of ideological and political education in the course, we can improve the objectivity and accuracy of course assessment and evaluation. In the teaching process, teachers should appropriately increase the proportion of discussion and questioning in classroom teaching to no less than 30%. Therefore, through questioning and other links, teachers can comprehensively investigate students' career outlooks and socialist core values <sup>[14]</sup>.
- (3) After-school session: According to the teaching content of each chapter, the ideological and political points of the course related to professional knowledge are selected and incorporated into the examination questions of the subject. At the same time, students will be assessed at the end of the semester. The content of the assessment must include the ideological and political points of the course. Only by improving the content can we increase students' attention to the ideological and political courses and better apply the ideological and political courses to specific teaching.

#### 4.2. Quantitative process-tracking assessment and evaluation standards

Since it is difficult to quantitatively measure the current ideological and political assessment of courses, through the process-tracking assessment system, the expected teaching results set by the ideological and political courses can be reflected in the assessment and evaluation criteria so that the relationship between assessment and teaching work can be established, and an organic connection can be created <sup>[15]</sup>. Therefore, based on ensuring that the ideological and political assessment of the course runs through the entire teaching process, a quantitative indicator is generated for the ideological and political results of the course at each teaching stage to achieve real-time tracking and timely feedback. The process-tracking ideological and political assessment system of the Personal Finance course is shown in **Table 2**.

**Table 2.** Personal Finance course process-tracking ideological and political assessment system

Assessment distribution	Evaluation mode	Behavior	Ideological and political assessment points
Normal score 50%	Classroom performance 10%	Learning before class and answering questions in class	Establishing the right values; Cultivating a high level of enthusiasm for learning
	Case analysis 15%	Making family financial statements; Analyzing and presenting cases	Ability to work in a hands-on environment; Situation-specific analyses
	Classroom discussion 15%	Completion of a comprehensive financial program	Ability to solve problems through a cooperative approach
Final score 50%	After-class assignments 10%	Percentage of after-school tasks completed	Ability to think independently about issues
	Final examination 50%	Acquisition of professional knowledge	Ability to acquire professional knowledge

## 5. Conclusion

Based on the ideological and political curriculum, this article takes the Personal Finance course of Xi'an Mingde Institute of Technology as an example to explore the innovative process-tracking ideological and political assessment system. By analyzing the shortcomings of the traditional curriculum assessment system, the possibility of integrating curriculum ideological and political education into curriculum assessment was pointed out. Additionally, the feasibility of this system in the course teaching process was proved, which is conducive to improving students' recognition and acceptance of "value guidance" in the ideological and political courses, and better cultivating high-quality talents for financial enterprises.

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## Disclosure statement

The author declares no conflict of interest.

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