



CAREER CLUSTER

Finance

INSTRUCTIONAL AREA

Professional Development

PRINCIPLES OF FINANCE EVENT

PARTICIPANT INSTRUCTIONS

- The event will be presented to you through your reading of the 21st Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you demonstrate the 21st Century Skills and meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

21st CENTURY SKILLS

- Critical Thinking – Reason effectively and use systems thinking.
- Communication – Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

PERFORMANCE INDICATORS

- Describe techniques for obtaining work experience.
- Explain the need for ongoing education as a worker.
- Explain possible career advancement patterns for jobs.
- Identify sources of career information.

EVENT SITUATION

You are to assume the role of a bank teller at LOGAN CITY BANK, a local bank in a small town. The intern (judge) has asked you about jobs and careers in finance.

The intern (judge) will be at the LOGAN CITY BANK location for the semester. The intern's (judge's) first role is to assist you and to learn the role and responsibilities of a bank teller. The intern (judge) will also assist others in the office including loan officers, business account representatives and customer service representatives.

The intern (judge) has asked you how to find out more about different careers and jobs in finance, education that is needed and advancement patterns. Aside from the internship, the intern (judge) wants to know how else to obtain experience.

You will present the information to the intern (judge) in a role-play to take place at the bank. The intern (judge) will begin the role-play by asking you about careers. After you have presented the information to the intern (judge) and have answered the intern's (judge's) questions, the intern (judge) will conclude the role-play by thanking you for the information.

JUDGE INSTRUCTIONS

DIRECTIONS, PROCEDURES AND JUDGE ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Participant Instructions, 21st Century Skills and Performance Indicators
2. Event Situation
3. Judge Role-Play Characterization
Allow the participants to present their ideas without interruption, unless you are asked to respond. Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
4. Judge Evaluation Instructions and Judge Evaluation Form
Please use a critical and consistent eye in rating each participant.

JUDGE ROLE-PLAY CHARACTERIZATION

You are to assume the role of an intern at LOGAN CITY BANK, a local bank in a small town. You have asked a bank teller (participant) about jobs and careers in finance.

You will be at the LOGAN CITY BANK location for the semester. Your first role is to assist the bank teller (participant) with learn the role and responsibilities of a bank teller. You will also assist others in the office including loan officers, business account representatives and customer service representatives.

You have asked the bank teller (participant) how to find out more about different careers and jobs in finance, education that is needed and advancement patterns. Aside from the internship, you want to know how else to obtain experience.

The participant will present the information to you in a role-play to take place at the bank. You will begin the role-play by asking about future careers.

During the course of the role-play you are to ask the following questions of each participant:

1. Which professional organizations are important to join in finance?
2. How can I use this internship as a tool for future employment?

After the bank teller (participant) has given you the information and has answered your questions, you will conclude the role-play by thanking the bank teller (participant).

You are not to make any comments after the event is over except to thank the participant.

EVALUATION INSTRUCTIONS

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event director and the other judges to ensure complete and common understanding for judging consistency.

Level of Evaluation	Interpretation Level
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 th percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 th percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 th percentile of business personnel performing this performance indicator.



PRINCIPLES OF FINANCE 2024

JUDGE'S EVALUATION FORM ASSOCIATION EVENT 2

INSTRUCTIONAL AREA: Professional Development

Participant: _____

ID Number: _____

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
PERFORMANCE INDICATORS						
1.	Describe techniques for obtaining work experience?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Explain the need for ongoing education as a worker?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Explain possible advancement patterns for jobs?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Identify sources of career information?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
21 st CENTURY SKILLS						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
TOTAL SCORE						