FINANCIAL LITERACY PROMOTION PROJECT

The Financial Literacy Promotion Project is a chapter project that provides an opportunity for chapter members to demonstrate the knowledge and skills needed in planning, organizing, implementing and evaluating a campaign to educate chapter members and the general public or an organized group about the importance of financial literacy.

After learning the economic principles associated with financial literacy, such as banking, budgeting, and setting and implementing financial goals (short term to retirement), chapter members will utilize their marketing knowledge and skills to communicate the benefits of financial literacy to others. Topics may include spending and saving, credit and debt, employment and income, investing, risk and insurance, and financial decision making. All chapter members are encouraged to participate.

The Financial Literacy Promotion Project provides an opportunity for chapter members to:
• demonstrate their knowledge and understanding of financial literacy
• engage in activity(ies) that clarify and enhance understanding of financial literacy
• utilize project management skills to plan and implement a presentation or activity(ies) to educate and promote financial literacy to organized groups and/or the general public
• evaluate the activity(ies’) effectiveness in promoting financial literacy
• develop a written report and presentation on the procedures of planning, implementing, coordinating and evaluating the project

The project may begin at any time after the close of the previous chartered association conference and run to the beginning of the next chartered association conference.

EVENT OVERVIEW

• The project consists of two major parts: the written document and the oral presentation by chapter representatives. The written document will account for 60 points, and the oral presentation will account for the remaining 40 of the total 100 points.
• This is a project for the entire DECA chapter. One to three chapter representatives may participate in the oral presentation. All chapter representatives must present the project to the judges.
• The body of the written entry must be limited to 20 numbered pages, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
• The Written Event Statement of Assurances and Academic Integrity must be signed and submitted with the entry. Do not include it in the page numbering.
• The oral presentation may be a maximum 15 minutes in length, including time for the judge’s questions.
• The judge will evaluate the presentation, focusing on how the chapter representatives explain the use of project management skills, the effectiveness of public speaking and presentation skills and how well the chapter representatives respond to questions that the judge may ask during the presentation.

PROJECT ORIGINALITY

In many Chapter Team Events, chapters have settled on a strategy that uses the same well-developed projects year after year. Succeeding chapter teams often take the previous year’s successful project and seek to improve it. If that strategy works in achieving a chapter’s goals and the experience teaches the principles of DECA, then the strategy serves the chapter, the community and DECA well.

Chapters submitting entries for chapter team events, however, should be challenged to do more than update the previous year’s written project. Project committees should avoid even reviewing the previous year’s entry. Judges (whose assignment is to evaluate a project according to established guidelines) will be impressed by the originality of a chapter’s project. Plagiarism of projects judged previously will automatically disqualify a chapter from competition and eligibility for awards.

Chapter representatives will demonstrate knowledge and skills needed to address the components of the project as described in the content outline and evaluation forms.

PARTICIPANTS will also develop many 21st Century Skills, in the following categories, desired by today’s employers:
• Communication and Collaboration
• Creativity and Innovation
• Critical Thinking and Problem Solving
• Flexibility and Adaptability
• Information Literacy
• Initiative and Self-direction
• Leadership and Responsibility
• Media Literacy
• Productivity and Accountability
• Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA’s competitive events. Crosswalks that show which 21st Century Skills are developed and which common core standards are supported by participating in each competitive event are available at deca.org.
WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY. This must be signed and submitted with the entry. Do not include it in the page numbering.

TITLE PAGE. The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

- FINANCIAL LITERACY PROMOTION PROJECT
- Title of the project
- Name of high school
- School address
- City, State/Province, ZIP/Postal Code
- Names of participants
- Date

Title page will not be numbered.

TABLE OF CONTENTS. The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will not be numbered.

BODY OF THE WRITTEN ENTRY. The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered “1” and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

I. EXECUTIVE SUMMARY
   - One- to three-page description of the project

II. INTRODUCTION
   A. Description of the local DECA chapter
   B. Description of the school and community

III. MANAGEMENT OF ACTIVITY(IES) TARGETED AT OUTSIDE AUDIENCE
   A. Purpose of the activity(ies)
   B. Planning and organization of activity(ies)
   C. Implementation of activity(ies)

IV. EVALUATION AND RECOMMENDATIONS
   A. Evaluation of campaign
   B. Recommendations for additional new activity(ies) for future campaigns

V. BIBLIOGRAPHY
   A bibliography is required. Include a list of the sources of information used in the written document.

VI. APPENDIX
   An appendix is optional. If additional material is appended, all pages must be numbered as noted previously. Include in an appendix any exhibits appropriate to the written entry, but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.
PENALTY POINT CHECKLIST
In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 52. These standards are designed to make competition as fair as possible.

PRESENTATION GUIDELINES
• Prior to the presentation, the judge will evaluate the written portion of the entry. The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
• The chapter representatives will present the project to the judge in a 15-minute presentation worth 40 points. (See Presentation Judging.)
• The presentation begins immediately after the introduction of the chapter representatives to the judge by the adult assistant. Each chapter representative must take part in the presentation.
• Each chapter representative may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
• If time remains, the judge may ask questions pertaining to the project.
• Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
• Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
• If any of these rules are violated, the adult assistant must be notified by the judge.

PRESENTATION JUDGING
Chapter representatives will make a 15-minute presentation to you. You may refer to the written entry, or to your notes, during the presentation.

At the beginning of the presentation (after introductions), the chapter representatives will describe the project. Allow the chapter representatives to complete this portion without interruption, unless you are asked to respond. Each chapter representative must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry itself (to which you may refer during the presentation).

At the conclusion of the presentation, thank the chapter representatives. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the presentation is 40 points.
**WRITTEN ENTRY EVALUATION FORM**

Please refer to the Written Entry Guidelines for a more detailed explanation of these items.

<table>
<thead>
<tr>
<th>EXECUTIVE SUMMARY</th>
<th>LITTLE/ NO VALUE</th>
<th>BELOW EXPECTATIONS</th>
<th>MEETS EXPECTATIONS</th>
<th>EXCEEDS EXPECTATIONS</th>
<th>JUDGED SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. One- to three-page description of the project</td>
<td>0-1-2-3</td>
<td>4-5-6</td>
<td>7-8</td>
<td>9-10</td>
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<table>
<thead>
<tr>
<th>INTRODUCTION</th>
<th>LITTLE/ NO VALUE</th>
<th>BELOW EXPECTATIONS</th>
<th>MEETS EXPECTATIONS</th>
<th>EXCEEDS EXPECTATIONS</th>
<th>JUDGED SCORE</th>
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</thead>
<tbody>
<tr>
<td>2. Description of the local DECA chapter and the school and community</td>
<td>0-1</td>
<td>2-3</td>
<td>4-5</td>
<td>6-7</td>
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<table>
<thead>
<tr>
<th>MANAGEMENT OF ACTIVITY(IES) TARGETED AT OUTSIDE AUDIENCE</th>
<th>LITTLE/ NO VALUE</th>
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<th>EXCEEDS EXPECTATIONS</th>
<th>JUDGED SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Purpose of activity(ies)</td>
<td>0-1-2</td>
<td>3-4-5</td>
<td>6</td>
<td>7-8</td>
<td></td>
</tr>
<tr>
<td>4. Planning and organization of activity(ies)</td>
<td>0-1-2</td>
<td>3-4-5</td>
<td>6</td>
<td>7-8</td>
<td></td>
</tr>
<tr>
<td>5. Implementation of activity(ies)</td>
<td>0-1-2</td>
<td>3-4-5</td>
<td>6</td>
<td>7-8</td>
<td></td>
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<table>
<thead>
<tr>
<th>EVALUATION AND RECOMMENDATIONS</th>
<th>LITTLE/ NO VALUE</th>
<th>BELOW EXPECTATIONS</th>
<th>MEETS EXPECTATIONS</th>
<th>EXCEEDS EXPECTATIONS</th>
<th>JUDGED SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Evaluation of campaign</td>
<td>0-1-2</td>
<td>3-4-5</td>
<td>6</td>
<td>7-8</td>
<td></td>
</tr>
<tr>
<td>7. Recommendations for additional new activity(ies) for future campaigns</td>
<td>0-1-2</td>
<td>3-4-5</td>
<td>6</td>
<td>7-8</td>
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<table>
<thead>
<tr>
<th>APPEARANCE AND WORD USAGE</th>
<th>LITTLE/ NO VALUE</th>
<th>BELOW EXPECTATIONS</th>
<th>MEETS EXPECTATIONS</th>
<th>EXCEEDS EXPECTATIONS</th>
<th>JUDGED SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Professional layout, neatness, proper grammar, spelling and word usage</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
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</table>

**WRITTEN ENTRY TOTAL POINTS (60)**

JUDGE __________
# Presentation Evaluation Form

## Technical Evaluation

<table>
<thead>
<tr>
<th>Category</th>
<th>LITTLE/NO VALUE</th>
<th>BELOW EXPECTATIONS</th>
<th>MEETS EXPECTATIONS</th>
<th>EXCEEDS EXPECTATIONS</th>
<th>JUDGED Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Opening presentation: overview and description of the project</td>
<td>0-1-2-3</td>
<td>4-5-6</td>
<td>7-8</td>
<td>9-10</td>
<td></td>
</tr>
<tr>
<td>2. Organization, clarity and effectiveness of the presentation</td>
<td>0-1</td>
<td>2-3</td>
<td>4</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

## TO WHAT EXTENT DID THE CHAPTER REPRESENTATIVES UTILIZE PROJECT MANAGEMENT SKILLS TO:

<table>
<thead>
<tr>
<th>Activity</th>
<th>LITTLE/NO VALUE</th>
<th>BELOW EXPECTATIONS</th>
<th>MEETS EXPECTATIONS</th>
<th>EXCEEDS EXPECTATIONS</th>
<th>JUDGED Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Initiate the project by identifying the focus of the campaign?</td>
<td>0-1</td>
<td>2-3</td>
<td>4</td>
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<tr>
<td>4. Plan and organize the project?</td>
<td>0-1</td>
<td>2-3</td>
<td>4</td>
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<tr>
<td>5. Execute and implement the campaign?</td>
<td>0-1</td>
<td>2-3</td>
<td>4</td>
<td>5</td>
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<tr>
<td>6. Evaluate and close the project?</td>
<td>0-1</td>
<td>2-3</td>
<td>4</td>
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## General

<table>
<thead>
<tr>
<th>Category</th>
<th>LITTLE/NO VALUE</th>
<th>BELOW EXPECTATIONS</th>
<th>MEETS EXPECTATIONS</th>
<th>EXCEEDS EXPECTATIONS</th>
<th>JUDGED Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>7. Professional standards (appearance, poise, confidence), presentation technique, effective use of visuals and participation of all</td>
<td>0-1</td>
<td>2-3</td>
<td>4</td>
<td>5</td>
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## Presentation Total Points (40)

<table>
<thead>
<tr>
<th>Component</th>
<th>Points</th>
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<tbody>
<tr>
<td>Written Entry (60)</td>
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<tr>
<td>Presentation (40)</td>
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<tr>
<td>Subtotal (100)</td>
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<tr>
<td>Less Penalty Points</td>
<td></td>
</tr>
<tr>
<td>Total Score</td>
<td></td>
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</tbody>
</table>

JUDGE __________