



**CAREER CLUSTER**  
Finance

**INSTRUCTIONAL AREA**  
Information Management

## **PRINCIPLES OF FINANCE EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> 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 meet the performance indicators or this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

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

### **PERFORMANCE INDICATORS**

1. Discuss the nature of information management.
2. Assess information needs.
3. Obtain needed information efficiently.
4. Apply information to accomplish a task.

## **EVENT SITUATION**

You are to assume the role of the supervisor for all bank tellers at CITY CENTER BANK, a local bank that has five locations. The bank president (judge) has asked you to determine how the bank can receive information about the bank tellers that work in the banks' drive thru locations.

CITY CENTER BANK has five locations throughout the city. Three of the locations have a drive thru option, where customers can make deposits and withdrawals from their accounts without leaving their vehicles. The three locations with the drive thru option have five bank tellers that work the drive thru only and do not have duties assisting customers inside the bank.

The bank president (judge) would like information from bank members about the bank tellers that work the drive thru at the three CITY CENTER BANKS that have that option. The bank president (judge) wants to ensure that the drive thru bank tellers are courteous, prompt and correctly handle customers' transactions. The bank president (judge) has asked you to determine how information about the drive thru bank tellers can be obtained efficiently.

You will explain the methods to the bank president (judge) in a role-play to take place in the president's (judge's) office. The bank president (judge) will begin the role-play by asking you about information management. After you have explained methods to the bank president (judge) and have answered the president's (judge's) questions, your president (judge) will conclude the role-play by thanking you for your work.

## JUDGE'S INSTRUCTIONS

### DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

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

1. Procedures
2. 21<sup>st</sup> Century Skills and Performance Indicators
3. Event Situation
4. Judge Situation Characterization  
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.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

### JUDGE SITUATION CHARACTERIZATION

You are to assume the role of the bank president at CITY CENTER BANK, a local bank that has five locations. You have asked the bank teller supervisor (participant) to determine how the bank can receive information about the bank tellers that work in the banks' drive thru locations.

CITY CENTER BANK has five locations throughout the city. Three of the locations have a drive thru option, where customers can make deposits and withdrawals from their accounts without leaving their vehicles. The three locations with the drive thru option have five bank tellers that work the drive thru only and do not have duties assisting customers inside the bank.

You would like information from bank members about the bank tellers that work the drive thru at the three CITY CENTER BANKS that have that option. You want to ensure that the drive thru bank tellers are courteous, prompt and correctly handle customers' transactions. You have asked the supervisor (participant) to determine how information about the drive thru bank tellers can be obtained efficiently.

The bank teller supervisor (participant) will explain information management methods to you in a role-play to take place at the bank. You will begin the role-play by asking about information management. During the course of the role-play you are to ask the following questions of each participant:

1. Is it more important to know how the drive thru tellers are doing overall or do we need information about each individual teller?
2. How often should the bank evaluate our drive thru tellers?

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

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

*Answers will vary but should demonstrate a basic understanding of the concepts.*

## JUDGE'S EVALUATION INSTRUCTIONS

### Evaluation Form Information

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 being 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 chairperson and the other judges to ensure complete and common understanding for judging consistency.

| <b>Level of Evaluation</b> | <b>Interpretation Level</b>                                                                                                                                                                                                                                                                                                                   |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 <sup>th</sup> 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 <sup>th</sup> 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 <sup>th</sup> percentile of business personnel performing this performance indicator.                               |



**PRINCIPLES OF FINANCE, 2018**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**  
DISTRICT EVENT

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA**  
Information Management

Did the participant:

| Did the participant:                  |                                                           | Little/No Value | Below Expectations | Meets Expectations | Exceeds Expectations | Judged Score |
|---------------------------------------|-----------------------------------------------------------|-----------------|--------------------|--------------------|----------------------|--------------|
| <b>PERFORMANCE INDICATORS</b>         |                                                           |                 |                    |                    |                      |              |
| 1.                                    | Discuss the nature of information management?             | 0-1-2-3-4-5     | 6-7-8-9-10         | 11-12-13-14        | 15-16-17-18          |              |
| 2.                                    | Assess information needs?                                 | 0-1-2-3-4-5     | 6-7-8-9-10         | 11-12-13-14        | 15-16-17-18          |              |
| 3.                                    | Obtain needed information efficiently?                    | 0-1-2-3-4-5     | 6-7-8-9-10         | 11-12-13-14        | 15-16-17-18          |              |
| 4.                                    | Apply information to accomplish a task?                   | 0-1-2-3-4-5     | 6-7-8-9-10         | 11-12-13-14        | 15-16-17-18          |              |
| <b>21<sup>st</sup> CENTURY SKILLS</b> |                                                           |                 |                    |                    |                      |              |
| 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                  |              |
| <b>TOTAL SCORE</b>                    |                                                           |                 |                    |                    |                      |              |