



**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 demonstrate the 21<sup>st</sup> 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.

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

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

**PERFORMANCE INDICATORS**

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- Discuss the nature of information management.
- Assess information needs.
- Obtain needed information efficiently.
- Identify ways that technology impacts business.

## **EVENT SITUATION**

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You are to assume the role of the bank teller supervisor at AROUND TOWN BANK. You will meet with a bank teller (judge) to explain how to gain needed information from customers who visit the bank in person rather than use the bank's mobile app.

AROUND TOWN BANK launched its mobile app last year. The mobile app allows bank customers to check balances, transfer funds, pay bills, deposit checks, and send funds to other account holders. The mobile app was launched hoping to reduce the number of customers who visit the bank in person.

After a year, there are still quite a few customers who visit the bank for tasks the mobile app can perform. The bank president wants the bank tellers to visit with each customer and ask about the mobile app and determine reasons why customers do not use it for simple tasks.

You will meet with a bank teller (judge) to identify specific questions the teller (judge) should ask each customer that will lead to needed information about the mobile app.

You will explain the information needed to the teller (judge) in a role-play to take place at the bank. The teller (judge) will begin the role-play by greeting you and asking to hear the information. After you have presented the information and have answered the teller's (judge's) questions, the teller (judge) will conclude the role-play by thanking you for your work.

## JUDGE INSTRUCTIONS

### DIRECTIONS, PROCEDURES AND JUDGE ROLE

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

1. Participant Instructions, 21<sup>st</sup> 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

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You are to assume the role of a bank teller at AROUND TOWN BANK. The bank teller supervisor (participant) will meet with you to explain how to gain needed information from customers who visit the bank in person rather than use the bank's mobile app.

AROUND TOWN BANK launched its mobile app last year. The mobile app allows bank customers to check balances, transfer funds, pay bills, deposit checks, and send funds to other account holders. The mobile app was launched hoping to reduce the number of customers who visit the bank in person.

After a year, there are still quite a few customers who visit the bank for tasks the mobile app can perform. The bank president wants the bank tellers to visit with each customer and ask about the mobile app and determine reasons why customers do not use it for simple tasks.

The bank teller supervisor (participant) will meet with you to identify specific questions you should ask each customer that will lead to needed information about the mobile app.

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

1. How should I proceed if a customer doesn't want to answer my questions?
2. How long should we question customers?

Once the bank teller supervisor (participant) has presented information and has answered your questions, you will conclude the role-play by thanking the bank teller supervisor (participant) for the work.

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

## EVALUATION INSTRUCTIONS

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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.

<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  
2021**

**JUDGE'S EVALUATION FORM  
DISTRICT EVENT - VIRTUAL**

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

**INSTRUCTIONAL AREA:  
Information Management**

ID Number: \_\_\_\_\_

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.	Identify ways that technology impacts business?	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>						