



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

## **EVENT SITUATION**

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You are to assume the role of an employee at BANK OF GRAYSON. A new employee (judge) has asked you about lifelong careers in the banking industry.

The new employee (judge) has recently started working at BANK OF GRAYSON as an entry level bank teller. The new employee (judge) has had no formal education after high school but had work experience at a grocery store, working with customers and handling money.

The new employee (judge) likes the work environment at BANK OF GRAYSON and has asked you about careers in the banking industry. The new employee (judge) wants you to identify careers in the banking industry, education needed for different careers, advancement patterns and how to locate resources for more information on banking careers.

You will explain banking careers to the new employee (judge) in a role-play to take place at the bank. The new employee (judge) will begin the role-play by asking you about careers. After you have discussed careers with the new employee (judge) and have answered the employee's (judge's) questions, the new employee (judge) will conclude the role-play by thanking you for your work.

## 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, 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

You are to assume the role of a new employee at BANK OF GRAYSON. You have asked a co-worker (participant) about lifelong careers in the banking industry.

You have recently started working at BANK OF GRAYSON as an entry level bank teller. You have had no formal education after high school but have work experience at a grocery store, working with customers and handling money.

You like the work environment at BANK OF GRAYSON and have asked a co-worker (participant) about careers in the banking industry. You want your co-worker (participant) to identify careers in the banking industry, education needed for different careers, advancement patterns and how to locate resources for more information on banking careers.

The participant will present information to you in a role-play to take place at the bank. You will begin the role-play by greeting the participant and asking to hear about his/her ideas.

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

1. If I go to school for finance, where else can I work besides a bank?
2. What other skills are important for someone working in the banking industry?

After your co-worker (participant) has explained careers and has answered your questions, you will conclude the role-play by thanking the co-worker (participant).

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  
2022**

**JUDGE'S EVALUATION FORM  
DISTRICT EVENT**

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

**INSTRUCTIONAL AREA:  
Professional Development**

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

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Identify sources of career information?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	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	
3.	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	
4.	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	
<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>						