



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

- Explain possible advancement patterns for jobs.
- Identify skills needed to enhance career progression.
- Use networking techniques to identify employment opportunities.
- Utilize resources that can contribute to professional development.

EVENT SITUATION

You are to assume the role of the branch manager at SQUARE ONE BANK, a multinational financial services company. A new employee (judge) has asked you about career progression in the financial services industry.

SQUARE ONE BANK offers customers bank accounts, loans, mortgages, credit cards and investment and banking services. The new employee (judge) was hired as a bank teller at a local branch location. The new employee (judge) is a college student who wants to pursue a career in finance.

The new employee (judge) has asked you about future careers in finance. The new employee (judge) wants to know:

- Possible advancement patterns
- Skills needed to enhance career progression
- Networking techniques that can identify employment opportunities
- Resources to utilize that can contribute to professional development

You will describe professional development opportunities to the new employee (judge) in a role-play to take place at the office. The new employee (judge) will begin the role-play by asking you about professional development. After you have provided information and have answered the new 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, 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 a new employee at SQUARE ONE BANK, a multinational financial services company. You have asked the branch manager (participant) about career progression in the financial services industry.

SQUARE ONE BANK offers customers bank accounts, loans, mortgages, credit cards and investment and banking services. You were hired as a bank teller at a local branch location. You are a college student who wants to pursue a career in finance.

You have asked the branch manager (participant) about future careers in finance. You want to know:

- Possible advancement patterns
- Skills needed to enhance career progression
- Networking techniques that can identify employment opportunities
- Resources to utilize that can contribute to professional development

The participant will present information to you in a role-play to take place at the office. You will begin the role-play by greeting the participant and asking about professional development.

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

1. Where else could I work besides a bank?
2. How do I ask someone to be a reference on my resume?

After the branch manager (participant) has provided information and has answered your questions, you will conclude the role-play by thanking the branch manager (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 2025

JUDGE'S EVALUATION FORM ICDC PRELIMINARY

INSTRUCTIONAL AREA: Professional Development

Participant: _____

ID Number: _____

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
PERFORMANCE INDICATORS						
1.	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	
2.	Identify skills needed to enhance career progression?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Use networking techniques to identify employment opportunities?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Utilize resources that can contribute to professional development?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
21st 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						