



PRINCIPLES OF FINANCE EVENT

CAREER CLUSTER
Finance

INSTRUCTIONAL AREA
Information Management

PARTICIPANT INSTRUCTIONS

This event is presented to you through your review of the Career Competencies, Performance Indicators and Event Situation.

You have up to 10 minutes to review this information and prepare your presentation. Using the materials provided, you may make notes to use during your presentation.

You will have up to 10 minutes to present to the judge(s).

You will be evaluated on your solution to the event situation, how you incorporate the performance indicators of this event and how you demonstrate the career competencies.

Turn in all your notes and event materials when you have completed the event.

SOLUTION

- Unique – Demonstrate original thinking, fresh perspectives and an insightful approach.
- Practical – Develop an actionable/viable solution in a real-world context.
- Effective – Develop a solution that achieves relevant outcomes.

CAREER COMPETENCIES

- Critical Thinking – Think critically to understand and solve problems.
- Communication – Communicate clearly, effectively and with reason.
- Decision Making – Consider the impacts of decisions.

PERFORMANCE INDICATORS

- Explain the nature of information management.
- Assess information needs.
- Apply information to accomplish a task.
- Identify ways that technology impacts business.

EVENT SITUATION

You are to assume the role of an employee at NEW INVESTMENTS, a financial services provider that specializes in investing basics. A co-worker (judge) does not understand the value of NEW INVESTMENTS having a presence on various social media platforms and wants you to explain.

A co-worker (judge) heard that NEW INVESTMENTS now has active Facebook, Instagram and TikTok accounts. The co-worker (judge) understands how social media users can benefit from content provided by NEW INVESTMENTS but does not understand the value that NEW INVESTMENTS receives from being on social media.

You must explain the value of NEW INVESTMENTS having a social media presence, useful information that can be gained by having active social media accounts and how it can be used to positively impact the business.

You will explain the information to the co-worker (judge) in a role-play to take place at the office. The co-worker (judge) will begin the role-play by asking you about social media. After you have discussed the information with the co-worker (judge) and have answered the co-worker's (judge's) questions, the co-worker (judge) will conclude the role-play by thanking you for your work.

JUDGE INSTRUCTIONS

JUDGE CHARACTERIZATION

You are to assume the role of an employee at NEW INVESTMENTS, a financial services provider that specializes in investing basics. You do not understand the value of NEW INVESTMENTS having a presence on various social media platforms and want a co-worker (participant) to explain.

You heard that NEW INVESTMENTS now has active Facebook, Instagram and TikTok accounts. You understand how social media users can benefit from content provided by NEW INVESTMENTS but do not understand the value that NEW INVESTMENTS receives from being on social media.

The co-worker (participant) must explain the value of NEW INVESTMENTS having a social media presence, useful information that can be gained by having active social media accounts and how it can be used to positively impact the business.

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 social media.

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

1. How can the company turn social media followers into customers?
2. How can we inform our current customers that the company is on social media?

After the co-worker (participant) has explained the information 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

- The participants are to be evaluated on their solution and ability to apply the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although the participants may demonstrate other performance indicators, those listed in the Performance Indicators section are the selected ones you are evaluating for this particular event.
- Maintain a consistent expectation when evaluating each participant.
- The maximum score for the evaluation is 100 points. The presentation will be weighted twice (2 times) the exam score.

Levels of Evaluation

FOCUS AREA	NOVICE	DEVELOPING	PROFICIENT	EXEMPLARY
Content Understanding	Demonstrates a limited or inaccurate understanding of key concepts.	Demonstrates a basic understanding of key concepts.	Demonstrates a solid understanding of key concepts and clearly explains and supports ideas using appropriate evidence.	Demonstrates comprehensive understanding of concepts and applies them effectively to solve the scenario, including in more complex or extended contexts.
Application of Performance Indicators and Career Competencies	Lists the performance indicators and career competencies, but understanding is incomplete or inaccurate.	Defines the performance indicators and career competencies, but does not connect them to solve the objective of the case study scenario.	Explains the performance indicators and career competencies and connects them to solve the objective of the case study scenario.	Strategically applies the performance indicators and career competencies and connects them to comprehensively solve the objective of the case study scenario.
Reasoning	Ideas are unclear, inaccurate, or lack logical support. There is no application of the ideas and concept.	Ideas are present and somewhat logical but contain gaps in reasoning, development, or supporting evidence.	Ideas are logical, well-developed, and supported with appropriate evidence, with only minor gaps.	Ideas are logical, well-supported using appropriate business concept and theories and demonstrates reasoning with clear practicality and real-world relevance.
Workplace Readiness	Participants represent an employee who requires significant guidance and support to complete tasks.	Participants represent an employee who demonstrates basic skills and can complete routine tasks with some guidance.	Participants represent an employee with solid skills and who works independently to complete tasks effectively.	Participants represent an employee with advanced skills, works independently, and adapts effectively to new or unpredictable challenges.



PRINCIPLES OF FINANCE – 2026

JUDGE'S EVALUATION FORM ASSOCIATION EVENT 1

Participant: _____

ID Number: _____

INSTRUCTIONAL AREA: Information Management

Rate the participant's ability to:		Novice	Developing	Proficient	Exemplary	Judged Score
PERFORMANCE INDICATORS						
1.	Explain the nature of information management.	0-1-2-3	4-5-6-7	8-9-10-11	12	
2.	Assess information needs.	0-1-2-3	4-5-6-7	8-9-10-11	12	
3.	Apply information to accomplish a task.	0-1-2-3	4-5-6-7	8-9-10-11	12	
4.	Identify ways that technology impacts business.	0-1-2-3	4-5-6-7	8-9-10-11	12	
SOLUTION						
5.	Unique Demonstrate original thinking, fresh perspectives and an insightful approach.	0-1-2	3-4-5	6-7	8	
6.	Practical Develop an actionable/viable solution in a real-world context.	0-1-2	3-4-5	6-7	8	
7.	Effective Develop a solution that achieves relevant outcomes.	0-1-2	3-4-5	6-7	8	
CAREER COMPETENCIES						
8.	Critical Thinking Think critically to understand and solve problems.	0-1	2-3	4-5	6	
9.	Communication Communicate clearly, effectively and with reason.	0-1	2-3	4-5	6	
10.	Decision Making Consider the impacts of decisions.	0-1	2-3	4-5	6	
OVERALL IMPRESSION						
11.	Demonstrate overall career readiness through professionalism, poise and confidence.	0-1-2-3	4-5-6	7-8-9	10	
TOTAL SCORE						