



CAREER CLUSTER

Finance

INSTRUCTIONAL AREA

Operations

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 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

1. Explain routine security precaution.
2. Protect company information and intangibles.
3. Explain information privacy, security, and confidentiality considerations in business.
4. Maintain data security.

EVENT SITUATION

You are to assume the role of an accountant at GEORGE & KEEN, an accounting firm that manages over 300 business clients. The firm recently began allowing employees to work from home. A coworker (judge) does not understand why security training is necessary to be able to work from home. You will describe basic reasons why security is important when working away from the office.

GEORGE & KEEN is the most trusted accounting firm in the region. With over 300 business clients and over 200 employees, the firm is well-known. Since it opened in 1967, GEORGE & KEEN has kept traditional office space, offering executives full offices and other staff members cubicles. The majority of the accounting work is done via computer rather than face-to-face client interaction, so not much space is needed.

To keep up with current business trends, executives at GEORGE & KEEN have begun letting accountants work from home. Accountants are issued a company laptop and other equipment and must have high speed internet capabilities in their workspace. Before the new work from home initiative begins, executives have insisted that all employees that want to work from home must attend a mandatory security training regarding company information, client information and company equipment.

A coworker that plans to work from home (judge) is unhappy about the mandatory security training and does not understand why it is necessary. You must explain to the coworker (judge) basic reasons why the training is essential.

You will explain basic reasons for security training to the coworker (judge) in a role-play to take place at your coworker's (judge's) cubicle. The coworker (judge) will begin the role-play by asking you about the training. After you have explained reasons to the coworker (judge) and have answered the coworker's (judge's) questions, the coworker (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. 21st 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 an accountant at GEORGE & KEEN, an accounting firm that manages over 300 business clients. The firm recently began allowing employees to work from home. You do not understand why security training is necessary to be able to work from home. A coworker (participant) will describe basic reasons why security is important when working away from the office.

GEORGE & KEEN is the most trusted accounting firm in the region. With over 300 business clients and over 200 employees, the firm is well-known. Since it opened in 1967, GEORGE & KEEN has kept traditional office space, offering executives full offices and other staff members cubicles. The majority of the accounting work is done via computer rather than face-to-face client interaction, so not much space is needed.

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You are unhappy about the mandatory security training and do not understand why it is necessary. The coworker (participant) must explain to you the basic reasons why the training is essential.

Your coworker (participant) will explain basic reasons for security training to you in a role-play to take place in your cubicle. You will begin the role-play by asking about the training. During the course of the role-play you are to ask the following questions of each participant:

1. Should the company provide security training to ALL employees?
2. How does allowing employees to work from home benefit the company?

After your coworker (participant) has given you an explanation and has answered your questions, you will conclude the role-play by thanking your coworker (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.

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, 2018

Participant: _____

JUDGE'S EVALUATION FORM

I.D. Number: _____

INSTRUCTIONAL AREA

Operations

Did the participant:

Did the participant:		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
PERFORMANCE INDICATORS						
1.	Explain routine security precautions?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Protect company information and intangibles?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Explain information privacy, security, and confidentiality considerations in business?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Maintain data security?	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						