



CAREER CLUSTER
Finance

INSTRUCTIONAL AREA
Operations

PRINCIPLES OF FINANCE EVENT

PARTICIPANT INSTRUCTIONS

PROCEDURES

1. The event will be presented to you through your reading of these instructions, including the Performance Indicators and Event Situation. You will have up to 10 minutes to review this information to determine how you will handle the role-play situation and demonstrate the performance indicators of this event. During the preparation period, you may make notes to use during the role-play situation.
2. You will have up to 10 minutes to role-play your situation with a judge (you may have more than one judge).
3. You will be evaluated on how well you meet the performance indicators of this event.
4. Turn in all your notes and event materials when you have completed the role-play.

PERFORMANCE INDICATORS

1. Follow established security procedures/policies
2. Protect company information and intangibles
3. Explain information privacy, security, and confidentiality considerations in business
4. Maintain data security

INTERVIEW SITUATION

You are to assume the role of a **Candidate for an Internship** with **American Federal Credit Union**, a regional credit union that recently opened a branch office in your community. You have submitted your resume and have been invited for a personal interview with the Human Resource Manager (judge). Some of the services that American Federal Credit Union offers its members include anytime deposit from their smart phone or tablet, security and fraud alerts for all members, annual privacy notices, ability to connect to Apple Pay, access to over 30,000 ATM's, and the ability to set up a secure e-mail connection with the credit union for safe and easy communication.

A major concern for American Federal Credit Union is keeping their members account and personal information confidential and secure. One of their competitors was recently in the news because an employee was sharing members account balances with other people in the community. As a result a few of the competitors' members have transferred their accounts to American Federal Credit Union. The Human Resource Manager (judge) wants to make sure you understand the importance of members' information security and confidentiality as it relates to American Federal Credit Union before considering you for an internship position.

During the interview you will need to explain the importance of following company security policies and procedures as well as how they protect members' account information. Following your explanation, the Human Resource Manager (judge) will ask you to respond to additional questions.

The interview will take place in the Human Resource Manager's (judge's) office. The Human Resource Manager (judge) will begin the interview by greeting you and asking to hear your explanation regarding the importance of information security and confidentiality as it relates to a credit union. After you have provided your explanation and have answered the Human Resource Manager's (judge's) questions, the Human Resource Manager (judge) will conclude the interview by thanking you for your presentation.

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. Performance Indicators
3. Interview 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 the Human Resource Manager with American Federal Credit Union, a regional credit union that recently opened a branch office in the candidate (participant's) community. The candidate (participant) has submitted their resume and you have invited them into your office for a personal interview. Some of the services that American Federal Credit Union offers its members include anytime deposit from their smart phone or tablet, security and fraud alerts for all members, annual privacy notices, ability to connect to Apple Pay, access to over 30,000 ATM's, and the ability to set up a secure e-mail connection with the credit union for safe and easy communication.

A major concern for American Federal Credit Union is keeping their members account and personal information confidential and secure. One of their competitors was recently in the news because an employee was sharing members account balances with other people in the community. As a result a few of the competitors' members have transferred their accounts to American Federal Credit Union. You want to make sure the candidate (participant) understands the importance of members' information security and confidentiality as it relates to American Federal Credit Union before considering them for an internship position.

During the interview the candidate (participant) will need to explain the importance of following company security policies and procedures as well as how they protect members' account information. Following their explanation, you will ask the candidate (participant) to respond to additional questions.

The interview will take place in your office. You will begin the interview by greeting the candidate (participant) and asking to hear their explanation regarding the importance of information security and confidentiality as it relates to American Federal Credit Union.

Following the candidate's (participant) explanation, you are to ask the following questions of each participant:

1. Why are security policies/procedures important?
 - a. *Possible Solutions: Answers will vary, but the candidate should show an understanding of the importance of having guidelines in place so that all employees handle members' information in the same way which helps ensure that members' account and personal information is secure.*

2. Why do you feel that you are the best candidate for this internship?
 - a. *Possible Solutions: Answers will vary, but the participant should be able to understand the importance of not putting down any of the other candidates.*

After the candidate (participant) has provided their explanation and answered your questions, you will conclude the interview by thanking the candidate (participant) for their presentation.

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, 2016

Participant: _____

JUDGE'S EVALUATION FORM
DISTRICT EVENT

I.D. Number: _____

INSTRUCTIONAL AREA: OPERATIONS

Did the participant:

| | | Little/No Value | Below Expectations | Meets Expectations | Exceeds Expectations | Judged Score |
|-------------------------------|---|-----------------|--------------------|--------------------|----------------------|--------------|
| PERFORMANCE INDICATORS | | | | | | |
| 1. | Follow established security procedures/policies | 0-1-2-3-4-5-6 | 7-8-9-10-11 | 12-13-14-15-16 | 17-18-19-20 | |
| 2. | Protect company information and intangibles | 0-1-2-3-4-5-6 | 7-8-9-10-11 | 12-13-14-15-16 | 17-18-19-20 | |
| 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 | 17-18-19-20 | |
| 4. | Maintain data security | 0-1-2-3-4-5-6 | 7-8-9-10-11 | 12-13-14-15-16 | 17-18-19-20 | |
| 5. | Overall impression and responses to the judge's questions | 0-1-2-3-4-5-6 | 7-8-9-10-11 | 12-13-14-15-16 | 17-18-19-20 | |
| TOTAL SCORE | | | | | | |