



CAREER CLUSTER
Finance

INSTRUCTIONAL AREA
Professional Development

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. Demonstrate problem solving skills
2. Demonstrate appropriate creativity
3. Assess personal interests and skills needed for success in business
4. Analyze employer expectations in the business environment

BUSINESS SITUATION

You are to assume the role of a HUMAN RESOURCES ASSISTANT at BENCHMARK INVESTMENTS, a mid-size investment company with approximately 40 employees of which over half are millennials (people born between roughly 1980 and 2000). Your human resources manager (judge) has asked you to analyze and make appropriate recommendations in response to recent findings regarding millennial employees. These findings show that these workers tend to be more disengaged than older workers, spend large amounts of their work day on their personal electronic devices, tend to dress more casual, and use all or most of the 10 sick days that they receive every year while missing work for various reasons. These trends run counter to what the traditional work model looks like at Benchmark Investments.

Your manager (judge) has asked you to meet with him/her today to discuss these trends and how Benchmark Investments can be proactive with these issues and their employees. You should be prepared to address the following areas in your presentation:

- How should we address the use of personal electronic devices at work?
- Should there be a dress code at Benchmark Investments? Why or why not?
- How do we make sure that employees understand and use their sick days in the manner that they were designed to be used? (for personal or immediate family sickness or medical care)
- Do we need to update all of our expectations to reflect the culture shift of the millennial generation? Explain.

Your meeting will take place in the human resource manager's (judge's) office. The human resource manager will begin the conversation by greeting you and asking to hear your ideas. Following your explanation, the human resource manager will ask you to respond to additional questions. After you have provided your explanation and have answered the human resource manager's questions, he/she will conclude the meeting 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 RESOURCES MANAGER at BENCHMARK INVESTMENTS, a mid-size investment company with approximately 40 employees of which over half are millennials (people born between roughly 1980 and 2000). You have asked the human resource assistant (participant) to analyze and make appropriate recommendations in response to recent findings regarding millennial employees. These findings show that these workers tend to be more disengaged than older workers, spend large amounts of their work day on their personal electronic devices, tend to dress more casual, and use all or most of the 10 sick days that they receive every year while missing work for various reasons. These trends run counter to what the traditional work model looks like at Benchmark Investments.

You have asked your assistant (participant) to meet with you today to discuss these trends and how Benchmark Investments can be proactive with these issues and their employees. You asked your assistant to be prepared to address the following areas during your meeting:

- How should we address the use of personal electronic devices at work?
- Should there be a dress code at Benchmark Investments? Why or why not?
- How do we make sure that employees understand and use their sick days in the manner that they were designed to be used? (for personal or immediate family sickness or medical care)

- Do we need to update all of our expectations to reflect the culture shift of the millennial generation? Explain.

The meeting will take place in your office. You will begin the conversation by greeting your assistant (participant) and asking to hear their ideas. Following their explanation, you will ask your assistant to respond to some additional questions. After they have provided their explanation and have answered your questions, you will conclude the meeting by thanking them for their presentation.

Judge Questions/Possible Solutions:

During the course of the meeting you will ask the following questions of all participants:

1. What would you say to an employee who said “I’m going to use up all my sick days every year whether I’m sick or not because I deserve it”?

Answers will vary, but students may refer to things such as:

- *The days are a benefit to be used when needed as outlined in the handbook*
- *If the sick days are misused the benefit may be done away with by management*
- *If management finds out that you used the days inappropriately, you might not get paid for them*

2. How do we communicate our expectations in these areas to our employees?

Answers will vary, but students may refer to things such as:

- *Hold a staff meeting to share the information with everyone at the same time*
- *Send out an e-mail to all staff*
- *Post updates in the break room*
- *Use multiple forms of communication (include all or some of the above)*

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, 2017

Participant: _____

JUDGE'S EVALUATION FORM
DISTRICT EVENT

I.D. Number: _____

INSTRUCTIONAL AREA: Professional Development

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
PERFORMANCE INDICATORS						
1.	Demonstrate problem solving skills	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Demonstrate appropriate creativity	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Asses personal interests and skills needed for success in business	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Analyze employer expectations in the business environment	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						