

**CAREER CLUSTER**

Finance

INSTRUCTIONAL AREA

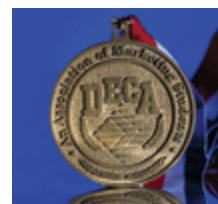
Operations/Financial Analysis

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 interview task. You will have up to 10 minutes to review this information to determine how you will perform the task and demonstrate the performance indicators of this event. During the preparation period, you may make notes to use during the interview situation.
2. You will have up to 10 minutes with the judge, including 5 to 7 minutes to accomplish the task and several minutes to respond to follow-up questions. (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 interview.

PERFORMANCE INDICATORS

1. Explain routine security precautions.
2. Protect company information and intangibles.
3. Protect against identify theft.
4. Explain legal responsibilities associated with financial exchanges.



INTERVIEW SITUATION

You are to assume the role of candidate for an internship with FIRST FEDERAL, a local banking facility. You have already submitted your résumé and completed one interview. This second and final interview will be used to measure your knowledge and understanding of an aspect of financial security. You are being interviewed by the vice president of the bank (judge).

Before offering the internship, the vice president (judge) wants to be sure that you have sufficient knowledge of security policies and procedures. Although no guarantees can be made to the bank's customers about avoiding identity theft, there are steps that can be taken to minimize the risk and damage if a problem occurs. In the first part of the interview, you are asked to demonstrate and/or explain your understanding of ways to protect the bank's customers against identify theft. You are to discuss common ways identity theft occurs; identity theft prevention techniques; and methods to control the damage should it occur. Your presentation should also include the performance indicators listed on the previous page. The second part of the interview will consist of answering questions the vice president (judge) will ask you.

The interview will take place in the vice president's (judge's) office. The vice president (judge) will begin the interview by greeting you and asking to hear your thoughts and ideas. After you have provided your information and have answered the vice president's (judge's) questions, the vice president (judge) will conclude the interview 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. 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 vice president of FIRST FEDERAL, a local banking facility. You are interviewing a candidate (participant) for an internship with the bank. The candidate (participant) has submitted a résumé and completed one interview. This second and final interview will be used to measure the candidate's (participant's) knowledge and understanding of an aspect of financial security.

Before offering the internship, you want to be sure that the candidate (participant) has sufficient knowledge of security policies and procedures. Although no guarantees can be made to customers about avoiding identity theft, there are steps that can be taken to minimize the risk and damage if a problem occurs. For the first part of this interview, the candidate (participant) has been asked to demonstrate and/or explain his/her understanding of ways to protect the bank's customers against identity theft. You have asked the candidate (participant) to discuss common ways identity theft occurs; identity theft prevention techniques; and methods to control the damage should it occur.

The interview will take place in your office. You will begin the interview by greeting the candidate (participant) and asking to hear his/her ideas. After the candidate (participant) has presented the appropriate material, you are to ask the following questions of each participant:

1. Why should a consumer safeguard his/her social security number?

2. Why do consumers need to file a police report when identity theft occurs?

Once the candidate (participant) has answered your questions, you will conclude the interview by thanking the candidate (participant) for his/her ideas.

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.

JUDGE'S EVALUATION FORM **PFN SAMPLE**

**PERFORMANCE
INDICATORS
DID THE PARTICIPANT:**

	Exceeds Expectations	Meets Expectations	Below Expectations	Little/No Value	Judged Score
1. Explain routine security precautions?	20, 19, 18, 17, 16	15, 14, 13, 12, 11	10, 9, 8, 7, 6	5, 4, 3, 2, 1	_____
2. Protect company information and intangibles?	20, 19, 18, 17, 16	15, 14, 13, 12, 11	10, 9, 8, 7, 6	5, 4, 3, 2, 1	_____
3. Protect against identify theft?	20, 19, 18, 17, 16	15, 14, 13, 12, 11	10, 9, 8, 7, 6	5, 4, 3, 2, 1	_____
4. Explain legal responsibilities associated with financial exchanges?	20, 19, 18, 17, 16	15, 14, 13, 12, 11	10, 9, 8, 7, 6	5, 4, 3, 2, 1	_____
5. Overall impression and responses to the judge's questions	20, 19, 18, 17, 16	15, 14, 13, 12, 11	10, 9, 8, 7, 6	5, 4, 3, 2, 1	_____
				TOTAL SCORE	_____