PERSONAL FINANCIAL LITERACY 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 demonstrate the 21st Century Skills and 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

- Discuss the motivations for and benefits of donating money, items, or time.
- Develop a list of charitable organizations and provide a possible reason that a donor might want to give money to each organization.
- Identify specific steps one should take when researching charitable and other not-for-profit organizations.
EVENT SITUATION

You are to assume the role of a financial advisor. A client (judge) wants to learn more about charitable giving.

A client (judge) has worked with you to create a monthly budget that includes discretionary income that is used for fun and entertainment. The client (judge) is interested in learning more about charitable giving and using some discretionary income for giving.

You have been the client’s (judge’s) financial advisor for several months and have learned that the client (judge) has a passion for reading. The client (judge) frequents the local public library and feels strongly about helping to ease burdens on the city’s homeless population.

You must discuss with the client (judge) the benefits of donating money, items or time to an organization; the reasons for giving; and steps to take when researching charitable and other not-for-profit organizations.

You will meet with the client (judge) in your office. The client (judge) will begin the meeting by greeting you and asking about charitable giving. After you have presented the information and have answered the client’s (judge’s) questions, the client (judge) will conclude the meeting by thanking you for your work.
JUDGE INSTRUCTIONS

DIRECTIONS, PROCEDURES AND JUDGE ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Participant Instructions, 21st Century Skills and Performance Indicators
2. Event Situation
3. Judge Role-Play Characterization
   - Allow the participants to present their ideas without interruption, unless you are asked to respond. 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.
4. Judge Evaluation Instructions and Judge Evaluation Form
   - Please use a critical and consistent eye in rating each participant.

JUDGE ROLE-PLAY CHARACTERIZATION

You are to assume the role of a client of a financial advisor (participant). You want to learn more about charitable giving.

You have worked with the financial advisor (participant) to create a monthly budget that includes discretionary income that is used for fun and entertainment. You are interested in learning more about charitable giving and using some discretionary income for giving.

The financial advisor (participant) has been your advisor for several months and has learned that you have a passion for reading. The financial advisor (participant) has also learned that you frequent the local public library and feel strongly about helping to ease burdens on the city’s homeless population.

The financial advisor (participant) must discuss with you the benefits of donating money, items or time to an organization; the reasons for giving; and steps to take when researching charitable and other not-for-profit organizations.

The meeting will take place in the financial advisor’s (participant’s) office. You will begin the meeting by greeting the financial advisor (participant) and asking about charitable giving. After the participant has presented the information, you are to ask the following questions of each participant:

1. How do I receive proof that I donated money or items, and why is this important?
2. Why is research of charitable organizations necessary?

Once the financial advisor (participant) has answered your questions, you will conclude the discussion by thanking the participant for the work.
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 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 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 director and the other judges to ensure complete and common understanding for judging consistency.

<table>
<thead>
<tr>
<th>Level of Evaluation</th>
<th>Interpretation Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Expectations</td>
<td>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.</td>
</tr>
<tr>
<td>Meets Expectations</td>
<td>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 70-89th percentile of business personnel performing this performance indicator.</td>
</tr>
<tr>
<td>Below Expectations</td>
<td>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 50-69th percentile of business personnel performing this performance indicator.</td>
</tr>
<tr>
<td>Little/No Value</td>
<td>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 0-49th percentile of business personnel performing this performance indicator.</td>
</tr>
</tbody>
</table>
PERSONAL FINANCIAL LITERACY EVENT 2024

JUDGE’S EVALUATION FORM
DISTRICT EVENT

INSTRUCTIONAL AREA: Spending

Participant: __________________________
ID Number: __________________________

<table>
<thead>
<tr>
<th>Did the participant:</th>
<th>Little/No Value</th>
<th>Below Expectations</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
<th>Judged Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERFORMANCE INDICATORS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Discuss the motivations for and benefits of donating money, items, or time?</td>
<td>0-1-2-3-4-5-6-7-8</td>
<td>9-10-11-12-13</td>
<td>14-15-16-17-18</td>
<td>19-20-21-22-23-24</td>
<td></td>
</tr>
<tr>
<td>2. Develop a list of charitable organizations and provide a possible reason that a donor might want to give money to each organization?</td>
<td>0-1-2-3-4-5-6-7-8</td>
<td>9-10-11-12-13</td>
<td>14-15-16-17-18</td>
<td>19-20-21-22-23-24</td>
<td></td>
</tr>
<tr>
<td>3. Identify specific steps one should take when researching charitable and other not-for-profit organizations?</td>
<td>0-1-2-3-4-5-6-7-8</td>
<td>9-10-11-12-13</td>
<td>14-15-16-17-18</td>
<td>19-20-21-22-23-24</td>
<td></td>
</tr>
</tbody>
</table>

21ST CENTURY SKILLS

| 4. Reason effectively and use systems thinking? | 0-1 | 2-3 | 4-5 | 6-7 |
| 5. Communicate clearly? | 0-1 | 2-3 | 4-5 | 6-7 |
| 6. Show evidence of creativity? | 0-1 | 2-3 | 4-5 | 6-7 |
| 7. Overall impression and responses to the judge’s questions | 0-1 | 2-3 | 4-5 | 6-7 |

TOTAL SCORE