



Life Event Planning

Life Event Planning is an *individual or team event* that recognizes participants who apply skills learned in Family and Consumer Sciences courses to manage the costs of an event. An event is defined here as any upcoming occasion that will bring changes and/or new experiences and accompanying financial challenges. Examples of events include, but are not limited to:

- preparing to move into a dormitory room
- hosting a party/other celebration
- operating a vehicle for one month
- taking a school or personal trip
- hosting a family reunion
- paying initial costs of a new job
- managing costs of attending the prom
- paying school expenses for one grade level.

Participants select an event, determine the amount they can budget for the event, and prepare in advance an event *portfolio*. At the event site, participants present their *portfolios* to the evaluators.

EVENT CATEGORIES

Junior: through grade 9

Senior: grades 10–12

Occupational: grades 10–12

See page 29 for more information on event categories.

ELIGIBILITY

1. States may submit one entry in each category of this event.
2. Participation is open to any nationally affiliated FCCLA member.
3. The Life Event Planning project must be planned and prepared by the participant(s) only. Supporting *resources* are acceptable as long as participants are coordinating their use and *resources* are cited appropriately verbally and/or in print during the presentation to avoid false credit for unoriginal or non-participant work.

4. The project must be developed and completed within a one-year span beginning July 1 and ending June 30 of the school year before the National Leadership Conference.
5. Participants must have completed a course or a unit in consumer management or financial education in a Family and Consumer Sciences program or must have completed a unit of the FCCLA Financial Fitness national program.

PROCEDURES & TIME REQUIREMENTS

1. Each participant will submit a *portfolio* to the event room consultant at the designated time for participation.
2. Room consultants and evaluators will have 10 minutes to preview the *portfolio* before the presentation begins.
3. The participant will have 5 minutes to set up for the event. Other persons may not assist.
4. The oral presentation **should be 5 to 10** minutes in length. A one-minute warning will be given at 9 minutes. The participant will be stopped at 10 minutes.
5. Following the presentation, evaluators will have 5 minutes to interview the participant.
6. Evaluators will use the rubric to score and write comments for each participant.
7. The total time required for this event is approximately 30 minutes.
8. Specifications for the *portfolio* are charted on the following page.

GENERAL INFORMATION

1. A table will be provided.
2. Participant(s) may not wear costumes for this event.
3. Spectators may not observe any portion of this event.
4. **Allowable Presentation Elements.**
Allowed: *Audio, Easel(s), Visual Equipment, Visuals.* Not Allowed: *Costumes/Uniforms, File Folders, Props/Pointers, Skits.*



LIFE EVENT PLANNING Specifications



Portfolio

The *portfolio* is a collection of materials used to document and illustrate the work of the project. Materials must be contained in the official FCCLA STAR Events binder/notebook obtained from the FCCLA national emblematic supplier. A decorative and/or informative cover may be included. All materials, including the *divider pages* and tabs, must fit within the cover. The binder/notebook must contain no more than 31 pages: 1 *project identification page*, 1 table of contents page, 0–5 *divider pages*, 1–2 *Planning Process* summary page(s), 1–3 profile of event page(s), 3–12 comparison shopping pages, 1–5 event plan page(s), and 1–2 resource summary page(s). All pages must be one-sided only. All pages except *divider pages* must be 8½" x 11". The *portfolio* will be turned in to the room consultant at the designated participation time.

Project Identification Page	One 8½" x 11" page on <i>plain paper</i> ; with no <i>graphics</i> or decorations; must include participant's name, chapter name, school, city, state, FCCLA national region, and project title.
Divider Pages	Zero to five divider pages, may be tabbed; may contain a title, section name, graphics, thematic decorations, and/or page numbers; may be larger than 8½" x 11", but still must fit within cover dimensions; should not include other content.
FCCLA <i>Planning Process</i> Summary Page	One to two 8½" x 11" page(s) summarizing how each step of the <i>Planning Process</i> was used to plan Summary Page and implement the project; use of the <i>Planning Process</i> may also be described in the oral presentation.
Profile of Event	One to three pages containing a profile of the selected event; must include type of event; (see examples in event description), a description of the role of needs and wants in the situation, a goal statement(s) for the project, a description of the role of values and/or priorities in the situation, and a summary of challenges involved in developing a workable financial plan.
Comparison Shopping	Three to twelve pages; must include evidence of comparison shopping for at least five goods and/or services; graphics may be used; develop your own format. Comparison shopping is defined here as an examination of the costs and features of two or more forms or sources of a specific product or service.
Event Plan	One to five pages using the chart format provided (see sample below); must include sources and amount of income budgeted, a list of all products/services to be acquired, sources selected, key features considered, quantities, unit costs, and total costs. Graphics may be used.
Resources Summary	One to two pages; must include list of at least six resources, both human and nonhuman, used to complete the project, including sources of product/service information and sources of advice; use an organized, consistent format; include a paragraph at the beginning of the list to summarize what was learned about use of resources while completing the project.
Appearance	<i>Portfolio</i> must be neat, legible, and <i>professional</i> and use correct grammar and spelling.

Life Event Planning Specifications (continued)

Oral Presentation

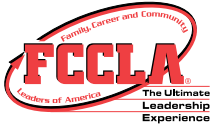
The oral presentation **should be 5 to 10** minutes in length and is delivered to evaluators. The presentation is to describe research and planning efforts in detail. The *portfolio* will be used by the participant during the oral presentation. Participants may use visuals including samples, objects, posters, charts, slides, transparencies, presentation software, and audiovisual equipment.

Organization/Delivery	Deliver oral presentation in an organized, sequential manner; concisely and thoroughly summarize research. Wear appropriate clothing for the nature of the presentation.
Knowledge of Subject Matter	Demonstrate knowledge of event planning.
Explanation of Financial Situation	Clearly and thoroughly explain the role of needs, wants, goals, values, priorities, and challenges in the financial situation.
Explanation of Decisions Involved in Financial Plan	Explain a minimum of three decisions that were involved in the financial plan.
Summary	Summarize ways in which planning a financial situation was helpful.
Use of <i>Portfolio</i> and <i>Visuals</i>	Use <i>portfolio</i> to describe all phases of the project. Use original, creative, and appealing <i>visuals</i> to enhance the presentation.
Voice	Speak clearly with appropriate pitch, volume, and tempo.
Body Language/ Clothing Choice	Use appropriate body language. Wear appropriate clothing for the nature of the presentation.
Grammar/Word Usage/ Pronunciation	Use proper grammar and word usage. Use proper pronunciation.
Responses to Evaluators' Questions	Provide clear and concise answers to evaluators' questions regarding project. Questions are asked after the presentation.

Sample Excerpt: Event Plan

Name of Member Iwanna B. Prepared Date June 30, 20XX
 Title of Project "Happy Birthday, Sis"
 Goal To host a surprise birthday party for my sister and pay all costs myself

INCOME		EXPENDITURES						
Source	Amount of Income	Product	Service	Source	Key Features	Quantity	Cost	Total Cost
Income, part-time job	\$225	NA	Rent Clubhouse	Local Civic-Clubhouse	Low cost, safe neighborhood, space to dance	1 day and night	\$75-25 (deposit returned)	\$50
savings	\$200	Vegetable Tray/Dip	NA	Neighborhood Deli	Low cost, tasty, healthy	1 to feed 50 people	\$35	\$35



STAR Events Point Summary Form LIFE EVENT PLANNING



LIFE EVENT PLANNING

Name(s) of Participant(s) _____

State _____ Team # _____ Group # _____

Category _____

DIRECTIONS:

1. Make sure all information at top is correct. If a student named is not participating, cross their name(s) off. If a team does not show, please write "No Show" across the top and return with other forms. Do **NOT** change team or group numbers.
2. Before student presentation, the room consultants must check participants' *portfolio* using the criteria and standards listed below and fill in the boxes.
3. At the conclusion of presentation, verify evaluator scores and fill in information below. Calculate the final score and ask for evaluators' verification. Place this form in front of the completed rubrics and paper clip all items related to the presentation together. Please do **NOT** staple.
4. At the end of competition in the room, double check all scores, names, and team numbers to ensure accuracy. Sort results by team order and turn in to the Lead or Assistant Lead Consultant.
5. Please check with the Lead or Assistant Lead Consultant if there are any questions regarding the evaluation process.

ROOM CONSULTANT CHECK			Points
Registration 0 or 5 points	0 Did not attend/incomplete team attendance	5 The individual or ALL participating members of the team attended	
Portfolio 0-1 points	0 Binder is not the Official FCCLA Binder and/or contents do not fit within the binder	1 Binder is the Official FCCLA Binder and contents fit within the binder	
Portfolio Pages 0-1 points	0 Portfolio exceeds the page limit or is missing one or more pieces of required information	1 Portfolio contains no more than 31 pages including: <ul style="list-style-type: none"> 1 project ID page 1 table of contents page Up to 5 divider pages 1-2 Planning Process summary pages 3-12 comparison shopping pages 1-5 event plan pages 1-2 resource summary pages 	
Project Identification Page 0-2 points	0 Project ID page is missing	1 Project ID page is present but includes incorrect information	2 Project ID page is present and completed correctly
Punctuality 0-1 points	0 Participant was late for presentation	1 Participant was on time for presentation	

EVALUATORS' SCORES

Evaluator 1 _____ Initials _____

Evaluator 2 _____ Initials _____

Evaluator 3 _____ Initials _____

Total Score _____ divided by number of evaluators

_____ = **AVERAGE EVALUATOR SCORE**

ROOM CONSULTANT TOTAL

(10 points possible)

AVERAGE EVALUATOR SCORE

(90 points possible)

FINAL SCORE

(Average Evaluator Score plus Room Consultant Total)

RATING ACHIEVED (circle one)

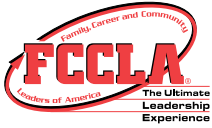
Gold: 90-100

Silver: 70-89.99

Bronze: 1-69.99

VERIFICATION OF FINAL SCORE AND RATING (please initial)

Evaluator 1 _____ Evaluator 2 _____ Evaluator 3 _____ Adult Room Consultant _____ Event Lead Consultant _____



LIFE EVENT PLANNING Rubric



LIFE EVENT PLANNING

Name(s) of Participant(s) _____

State _____ Team # _____ Group # _____

Category _____

PORTFOLIO							Points
FCCLA Planning Process Summary Page 0–5 points	0 Planning Process summary not provided	1 Inadequate steps in the Planning Process are presented	2 All Planning Process steps are presented but not summarized	3 All Planning Process steps are summarized	4 Evidence that the Planning Process was utilized to plan project	5 The Planning Process is used to plan the project. Each step is fully explained	
Profile of Event Role of needs/wants 0–3 points	0 Not included	1 Explanation unclear	2 Explained partially	3 Explained thoroughly			
Profile of Event Goal statement(s) 0–2 points	0 Goals(s) of project not stated	1 Goal(s) of project stated	2 Goal(s) of project stated and is measurable, specific, and appropriate for the project				
Profile of Event Role of Values and/or Priorities 0–2 points	0 Role of values/priorities not stated	1 Role of values/priorities stated, but unclear	2 Role of values/priorities stated clearly and thoroughly				
Profile of Event Description of Financial Challenges 0–3 points	0 Financial challenges were not described	1 Challenge(s) described partially, but unclear	2 Challenges partially described	3 Challenges described clearly and thoroughly			
Comparison Shopping Format 0–3 points	0 Disorganized, lacks consistent format	1 Format difficult to interpret	2 Format understandable, but could be organized more effectively	3 Format clear and effective			
Comparison Shopping Sources Identified 0–3 points	0 No sources stated for goods/services	1 Only 1 or 2 sources identified	2 3 or 4 sources identified and explained fully	3 5 or more sources identified and explained fully and consistently			
Comparison Shopping Key Considerations 0–3 points	0 No key features identified as considerations	1 Identified for up to 1/3 of items	2 Identified for up to 2/3 of items	3 Identified for 100% of items in a clear, consistent, and understandable format			
Comparison Shopping Quantities of Goods and Services 0–3 points	0 No quantities shown	1 Quantities shown for up to 1/3 of items	2 Quantities shown for up to 2/3 of items	3 Quantities shown for up to 100% of items			
Event Plan List of goods/services 0–3 points	0 Most needed goods/services omitted	1 Many needed goods/services omitted	2 Most needed goods/services listed	3 All needed goods/services listed			
Event Plan Quantities and costs 0–3 points	0 Quantities and costs not shown	1 Shown for up to 1/3 of items	2 Shown for up to 2/3 of items	3 Shown for more than 2/3 or all items			
Resources Summary Variety of Resources 0–3 points	0 Only one type of resource, no variety	1 2–3 types of resources, minimal variety	2 4–5 types of resources, some variety	3 6 or more types of resources			
Resources Summary Format Used 0–2 points	0 Disorganized, lacks consistent format	1 Format difficult to interpret	2 Format clear and effective				

Life Event Planning Rubric (continued)

Points

Resources Summary <i>Summary of Learnings</i> 0–3 points	0 No paragraph of learnings	1 Summary of learnings unclear	2 Only partially explained	3 Explained clearly and thoroughly	
Appearance 0–3 points	0 Portfolio is illegible and unorganized	1 Portfolio is neat but contains grammatical or spelling errors and is organized poorly	2 Portfolio is neat, legible and professional, with correct grammar and spelling	3 Neat, legible, and professional, correct grammar and spelling used; effective organization	

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ORAL PRESENTATION Points

Organization/Delivery 0–10 points	0 Presentation is not done or speaks briefly and does not cover components of the project	1–2 Presentation covers some topic elements	3–4 Presentation covers all topic elements but with minimal information	5–6 Presentation gives complete information but does not explain the project well	7–8 Presentation covers information completely but does not flow well	9–10 Presentation covers all relevant information with a seamless and logical delivery	
Explained Financial Situation <i>1. needs and wants</i> <i>2. goal(s)</i> <i>3. values and priorities</i> <i>4. financial challenges</i> 0–4 points	0 None of the four elements are explained, either partially or in full	1 1–2 elements explained, either partially or in full	2 3 elements explained, either partially or in full	3 All 4 elements explained, but one or more is incomplete	4 All 4 elements explained clearly and thoroughly		
Explained Decisions Involved in Developing Financial Plan for Event 0–5 points	0 Did not mention/explain any decisions	1 Mentioned one decision, did not explain	2 Mentioned two decisions, did not explain	3 Explained one decision	4 Explained two decisions	5 Explained three or more decisions	
Knowledge of Subject Matter 0–5 points	0 Little or no evidence of knowledge	1 Minimal evidence of knowledge	2 Some evidence of knowledge	3 Knowledge of subject matter is evident but not shared in presentation	4 Knowledge of subject matter is evident and shared at times in presentation	5 Knowledge of subject matter is evident and incorporated throughout the presentation	
Use of Portfolio and Visuals During Presentation 0–5 points	0 Portfolio and visuals are not used during presentation	1 Portfolio and visuals are used to limit amount of speaking time	2 Portfolio and visuals are used minimally during presentation	3 Portfolio and visuals are incorporated throughout presentation	4 Portfolio and visuals used effectively throughout presentation	5 Presentation moves seamlessly between oral presentation, portfolio, and visuals.	
Summary of Ways in Which Financial Planning was Helpful 0–3 points	0 No summary given	1 Summary was ineffective	2 Somewhat effective summary	3 Highly effective summary			
Voice—pitch tempo, volume 0–3 points	0 No voice qualities are used effectively	1 Voice quality is adequate	2 Voice quality is good, but could improve	3 Voice quality is outstanding and pleasing to listen to			
Body Language/Clothing Choice 0–3 points	0 Body language shows nervousness and unease/ inappropriate clothing	1 Body language shows minimal amount of nervousness/ clothing is appropriate	2 Body language is good and clothing is professional	3 Body language and clothing choice both enhance the presentation			
Grammar/Word Usage/Pronunciation 0–3 points	0 Extensive (more than 5) grammatical and pronunciation errors	1 Some (3–5) grammatical and pronunciation errors	2 Few (1–2) grammatical and pronunciation errors	3 Presentation has no grammatical or pronunciation errors			
Responses to Evaluators' Questions 0–5 points	0 Did not answer evaluators' questions	1 Unable to answer some questions	2 Responded to all questions, but without ease or accuracy	3 Responded adequately to all questions	4 Gave appropriate responses to evaluators' questions	5 Responses to questions were appropriate and given without hesitation	

Evaluator's Comments:

TOTAL
(90 points possible)

Evaluator Initial _____

Room Consultant Initial _____

Life Event Planning Teaching Tips for Advisers

The Life Event Planning event empowers participants by teaching them to take responsibility for their financial situations. Participants use a budgeted amount of money and develop a financial plan that enables them to achieve a short-term goal related to a real-life event. The effectiveness of planning predicts the outcomes of the project.

This event works well as a class learning activity. Write on the board the following message, starting with very large letters, gradually diminishing, with the last couple of

Don't Forget to Plan Ahead

letters barely fitting into the remaining space. Have students copy the quote in their notes. Have them think of a time when their failure to plan ahead caused problems and write about the type of planning they should have done and the problems that resulted without it. Have students summarize by writing a simile comparing the lack of financial planning with the sign. Use the prompt: “Failing to do financial planning is like this sign because...” (For example: Failing to do financial planning is like this sign because, when you don't plan ahead and use your resources carefully, you are likely to run out of money before all of your needs are met.) Follow up by writing on the board: “Failing to plan is like planning to fail.” Discuss.

