



FBLA BUSINESS FINANCIAL PLAN

Performance Rating Sheet

Preliminary Round Final Round

(Mark one score per row **AND** write score in the Points Earned column. Use Tie Breaker column to add or subtract points to break ties.)

Expectation Item	Not Demonstrated		Below Expectations		Meets Expectations		Exceeds Expectations		Points Earned	Tie Breaker
	0	○	5	○	10	○	15	○		
Describes company, operations, and management (current and projected)	No evidence of company, operations, or management		Company is explained briefly; very limited description of operations or management		Company is clearly outlined. Description of operations and management included		Company is clearly outlined. Detailed description of operations and management with plan for future growth			
	0	○	5	○	10	○	15	○		
Describes the financial plan and strategies to obtain loan	No evidence of financial plan or strategies		Financial plan is explained briefly; very limited strategies are utilized		Financial plan is clearly outlined. More than one strategy is outlined		Financial plan is clearly outlined. Strategies are chronological and clearly explained			
	0	○	5	○	10	○	15	○		
Explains underlying assumptions and provides supporting information	No evidence of assumptions or supporting information		One assumption is given with no supporting information		Two assumptions are given with at least one supporting statement of each assumption		Three or more assumptions are given with at least two supporting statements of each assumption			
	0	○	5	○	10	○	15	○		
Identifies and analyzes risks and adverse results and provides plan to avoid adverse results	No evidence of risks or adverse results		One risk OR adverse result is given; no evidence of planning		Two risks and at least one adverse result identified; includes a plan with at least one step to avoid adverse results		Three risks and at least one adverse result identified; includes a plan with at least two steps to avoid adverse results			
	0	○	5	○	10	○	15	○		
Explains purpose of loan amount requested and projections for company stability	No evidence of loan request or company projections received		Purpose of the loan request explained OR at least one projection for company's stability given		Purpose of loan request explained; at least one projection for the company's stability given		Purpose of loan request explained; at least two projections for the company's stability given			
	0	○	3	○	7	○	10	○		

Delivery Skills

Statements are well-organized and clearly stated (See above Expectation Items)	Presenter(s) did not appear prepared		Presenter(s) were prepared, but flow was not logical		Presentation flowed in logical sequence		Presentation flowed in a logical sequence, statements were well organized			
	0	○	3	○	7	○	10	○		
Demonstrates self-confidence, poise, assertiveness, and good voice projection	Presenter(s) did not demonstrate self-confidence		Presenter(s) demonstrated self-confidence and poise		Presenter(s) demonstrated self-confidence, poise, and good voice projection		Presenter(s) demonstrated self-confidence, poise, good voice projection, and assertiveness			
	0	○	3	○	7	○	10	○		
Demonstrates the ability to effectively answer questions	Unable to answer questions		Does not completely answer questions		Completely answers questions		Interacted with the judges in the process of completely answering questions			
	0	○	3	○	7	○	10	○		
Performance Subtotal (100 max)										

Penalty Points (Mark all that apply)

Time over 7 minutes	-5	○	Dress Code not followed	-5	○	Event Guidelines not followed	-5	○	Total Penalty	-	
									Report Total (200 max)		
									Grand Total		

Name(s): _____

School: _____

State: _____

Judge's Signature: _____

Date: _____



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Report Rating Sheet

(Mark one score per row **AND** write score in the Points Earned column. Use Tie Breaker column to add or subtract points to break ties.)

Expectation Item	Not Demonstrated		Below Expectations		Meets Expectations		Exceeds Expectations		Points Earned	Tie Breaker
	0	○	10	○	20	○	30	○		
Description of business, assumptions, and strategies to obtain loan	No description of business, assumptions OR strategies to obtain the loan is given		Description of the business, assumptions, and strategies to obtain a loan are given, but one or more descriptions are vague		Description of business, assumptions, and strategies to obtain the loan are provided and well written		Description of business, assumptions, and strategies to obtain loan serves as a strong introduction and transitions into the remainder of the report			
Describe Company: Legal form of business Company governance Company location(s) Long- and short-term goals	More than one of the components listed is not addressed		Description of one or more components is limited OR one or more components is not described		All components are described adequately		All components are described adequately with supporting documentation			
Discuss Operations and Management Business facilities described Management personnel identified Workforce described (current and projected)	More than one of the components listed is not addressed		Description of one or more components is limited OR one or more components is not described		All components are described adequately		All components are described adequately with supporting documentation			
Present Target Market: Target market defined (size, growth potential, needs) Risks and potential adverse results identified, analyzed, and planned for	More than one of the components listed is not addressed		Description of one or more components is limited OR one component is not described		All components are described adequately		All components are described adequately with supporting documentation			
Include Financial Institution Information: Name and type of financial institution for loan needs Discuss Loan Request Purpose of loan & amount requested Itemized planned expenditures Projections for future financial stability	More than one of the components listed is not addressed		Description of one or more components is limited OR one or more components is not described		All components are described adequately		All components are described adequately with supporting documentation			
Include supporting documentation	No Work Cited page is included in the report		Project has a correctly formatted Work Cited page but other supporting documentation is missing or limited		Project has a correctly formatted Work Cited page and other supporting documentation is provided		Project has a correctly formatted Work Cited page and other supporting documentation in each section			



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Report Rating Sheet (continued)

Report Format

Arrange information according to rating sheet (See above Expectation Items)	Missing 1 or more sections and/or does not follow rating sheet		All information presented, but order inconsistent with rating sheet		Information arranged according to the rating sheet		Presented in the correct order and includes written transitions between sections			
	0	<input type="radio"/>	3	<input type="radio"/>	7	<input type="radio"/>	10	<input type="radio"/>		
Format and design a business report	Does not format document		Inconsistent formatting, excessive white space, and/or unrelated graphics and/or photos		Consistent formatting throughout the report		Utilizes full bleed, effective use of space, related defined graphics, and consistent formatting			
	0	<input type="radio"/>	3	<input type="radio"/>	7	<input type="radio"/>	10	<input type="radio"/>		
Include correct grammar, punctuation, and spelling	More than 5 grammar, punctuation, or spelling errors		3-4 grammar, punctuation, or spelling errors		No spelling errors, and not more than 2 grammar or punctuation errors		No spelling errors, and not more than one grammar or punctuation error			
	0	<input type="radio"/>	1	<input type="radio"/>	3	<input type="radio"/>	5	<input type="radio"/>		
Report Subtotal (200 max)										

Penalty Points

Report Guidelines not followed	-5	<input type="radio"/>	Total Penalty	-	
			Grand Total		

Name(s): _____

School: _____

State: _____

Judge's Signature: _____

Date: _____