

# Business Financial Plan Report Rating Sheet

Expectation Item	Not Demonstrated	Below Expectations	Meets Expectations	Exceeds Expectations	Points Earned
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	
	0	1-10	11-20	21-30	
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	
	0	1-10	11-20	21-30	
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	
	0	1-10	11-20	21-30	
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	
	0	1-10	11-20	21-30	
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	
	0	1-10	11-20	21-30	
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	
	0	1-8	9-18	19-25	

### 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	1-3	4-7	8-10	
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	1-3	4-7	8-10	
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	1-2	3-4	5	

**Report Subtotal (200 max)**

### Penalty Points 0

Report Guidelines not followed	-5	<b>Total Penalty</b>	-
Judge's comments can go on the back of this sheet.		<b>Grand Total</b>	

Name \_\_\_\_\_

School \_\_\_\_\_

Judge's Signature \_\_\_\_\_

Date \_\_\_\_\_

Judge's Comments \_\_\_\_\_