

Course Name: Business and Entrepreneurial Principles **EDITS**

Course Number: 8215120

Overall Percentage for Performance Tasks: __100%__

Performance Task #1	Students will complete the following Business Financial Plan.
Weighting Percent for this Task	100%
Standard	<p>04.01 Locate, comprehend and evaluate key elements of oral and written information.</p> <p>04.02 Draft, revise, and edit written documents using correct grammar, punctuation and vocabulary.</p> <p>04.03 Present information formally and informally for specific purposes and audiences.</p> <p>05.05 Project a positive impression in person and acknowledging the importance of making eye contact.</p> <p>05.06 Function as a team member and participate in group discussions to identify and resolve problems.</p> <p>05.10 Answer questions in formal and information situations.</p> <p>05.12 Interpret information obtained from various sources (e.g., business correspondence, professional articles, supporting graphic materials, manuals, computer printouts, electronic sources).</p> <p>05.15 Demonstrate active listening techniques.</p> <p>05.17 Identify relevant information in oral communications.</p> <p>05.18 Determine when more information is needed and ask appropriate questions.</p> <p>05.25 Use appropriate etiquette and manners when communicating with people of varying cultures.</p> <p>06.01 Select and employ appropriate communication concepts and strategies to enhance oral and written communication in the workplace.</p> <p>06.02 Locate, organize and reference written information from various sources.</p> <p>06.03 Design, develop and deliver formal and informal presentations using appropriate media to engage and inform diverse audiences.</p> <p>06.04 Interpret verbal and nonverbal cues/behaviors that enhance communication.</p> <p>06.05 Apply active listening skills to obtain and clarify information.</p> <p>06.06 Develop and interpret tables and charts to support written and oral communications.</p> <p>07.03 Revise and edit business documents and e-mails to ensure they are clear, correct, concise, complete, consistent, and courteous.</p> <p>07.04 Compose and create business communications appropriate for specific audiences.</p> <p>07.05 Present findings of projects in a formal presentation using appropriate graphics, media, and support materials.</p> <p>07.06 Analyze and synthesize information obtained from print and electronic resources for group discussions and team building activities.</p>

<p>Exemplar</p>	<p>08.02 Employ technological tools to expedite workflow including word processing, databases, reports, spreadsheets, multimedia presentations, electronic calendar, contacts, e-mail and internet applications.</p> <p>08.03 Employ computer operations applications to access, create, manage, integrate, and store information.</p> <p>08.04 Employ collaborative/groupware applications to facilitate group work.</p> <p>08.05 Employ real time work with the cloud technologies.</p> <p>10.03 Compare and contrast the various forms of business ownership (e.g., sole proprietorships, partnerships, corporations) and other organizational structures (e.g., nonprofit organizations, governmental agencies).</p> <p>10.04 Identify variations of basic forms of business ownership (e.g., franchises, employer stock ownership programs).</p> <p>10.07 Analyze organizational charts and discuss how various supervisory/management positions fit into the organizational structure.</p> <p>10.08 Describe the role of technology in the overall management process.</p> <p>10.12 Compare and contrast the advantages and disadvantages of doing business using various forms of business ownership.</p> <p>10.13 Distinguish a limited partnership from a general partnership.</p> <p>10.18 Define a limited liability corporation.</p> <p>10.21 Define a corporation and explain why a corporation is a legal entity.</p> <p>12.01 Project a professional image through appropriate business attire, ethical behavior, personal responsibility, flexibility, and respect for confidentiality.</p> <p>12.02 Apply decision-making processes to business applications.</p> <p>12.11 Exhibit positive attitude and professional behavior.</p> <p>14.03 Construct charts/tables/graphs using functions and data.</p> <p>14.04 Describe the importance of financial statements.</p> <p>16.01 Identify ways in which businesses compete with each other (e.g., quality, service, status, price).</p> <p>17.04 Identify the kinds of benefits offered to employees (e.g., insurance plans; retirement plans; payroll deductions for savings bonds, cafeteria plans, 401K plans) and describe the proposal process of acquiring and negotiating benefits.</p> <p>17.05 Describe methods used to compensate employees (e.g., minimum wage, wages, salary, commission). Describe the methods to negotiate employee compensation and the role of benchmark surveys.</p> <p>18.01 Explain how tax policies, licensure requirements, and governmental regulations affect a business.</p> <p>19.06 Define long-term and short-term planning.</p> <p>19.08 Develop a basic business plan.</p>
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(If applicable)	
Additional Information	
Suggested Assessment Team	Student will be provided the following FBLA written rubric. The project will be graded by a business community member.

Rubric:

FBLA RATING SHEETS



FBLA BUSINESS FINANCIAL PLAN
Report Rating Sheet
Revised 2012-13

Evaluation Item	Not Demonstrated	Does Not Meet Expectations	Meets Expectations	Exceeds Expectations	Points Earned
Report Content					
Description of business, assumptions, and strategies to obtain loan (one page)	0	1-10	11-20	21-30	
Company Description <ul style="list-style-type: none"> • Legal form of business • Company governance • Company location(s) • Long- and short-term goals 	0	1-7	8-14	15-20	
Operations and Management <ul style="list-style-type: none"> • Business facilities described • Management personnel identified • Workforce described (current and projected) 	0	1-8	9-18	19-25	
Target Market <ul style="list-style-type: none"> • Target market defined (size, growth potential, needs) • Risks and potential adverse results identified, analyzed, and planned for 	0	1-10	11-20	21-30	
Financial Institution <ul style="list-style-type: none"> • Name and type of financial institution to which loan application is being made 	0	1-7	8-14	15-20	
Loan Request <ul style="list-style-type: none"> • Purpose of loan and amount requested • Itemized planned expenditures • Projections for future stability of company 	0	1-10	11-20	21-30	
Supporting Documents <ul style="list-style-type: none"> • Works cited page 	0	1-5	6-10	11-15	
Format					
Clear and concise presentation with logical arrangement of information following the rating sheet categories	0	1-5	6-10	11-15	
Correct grammar, punctuation, spelling, and acceptable business style	0	1-5	6-10	11-15	
Subtotal					/200 max.
Penalty Points Deduct five (5) points each for not adhering to Report Guidelines (maximum of twenty [20] points): <input type="checkbox"/> cover incorrect <input type="checkbox"/> missing table of contents <input type="checkbox"/> over fifteen (15) pages <input type="checkbox"/> no page numbers <input type="checkbox"/> report format does not follow rating sheet					
Total Points					/200 max.

Name(s): _____
 School: _____ State: _____
 Judge's Signature: _____ Date: _____
 Judge's Comments:



FBLA BUSINESS FINANCIAL PLAN
Performance Rating Sheet

Preliminary Round

Final Round

Evaluation Item	Not Demonstrated	Does Not Meet Expectations	Meets Expectations	Exceeds Expectations	Points Earned
Content					
Description of the company, operations, and management (current & projected)	0	1-5	6-10	11-15	
Description of the financial plan and strategies to obtain loan	0	1-5	6-10	11-15	
Underlying assumptions explained and supported	0	1-5	6-10	11-15	
Risks and potential adverse results identified, analyzed, and planned	0	1-5	6-10	11-15	
Purpose of loan and amount requested and projections	0	1-3	4-7	8-10	
Delivery					
Statements are well-organized and clearly stated; appropriate business language used	0	1-3	4-7	8-10	
Demonstrates self-confidence, poise, and good voice projection	0	1-3	4-7	8-10	
Demonstrates the ability to effectively answer questions	0	1-3	4-7	8-10	
Subtotal					/100 max.
Time Penalty Deduct five (5) points for presentation over seven (7) minutes. Time:					
Dress Code Penalty Deduct five (5) points when dress code is not followed.					
Penalty Deduct five (5) points for failure to follow guidelines.					
Total Points					/100 max.
Report Score					/200 max.
Final Score (add total points and report score)					/300 max.

Name(s): _____

School: _____ State: _____

Judge's Signature: _____ Date: _____

Judge's Comments:

