

Personal Finance
Rubric

Team/School Name: _____

Presentation Time: _____

Judge Name: _____

On a scale of 1 to 10, please shade the **single** grade you are assigning to each section. There is a page at the end of the assessment tool to identify areas of improvement and general comments.

PROBLEM IDENTIFICATION Primary and secondary issues are clearly identified with clear context given.			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> ▪ Unclear or missing ▪ Problems are not identified ▪ Presenters simply restate case facts 	<ul style="list-style-type: none"> ▪ Somewhat clear ▪ The problems identified are vague 	<ul style="list-style-type: none"> ▪ Mostly clear ▪ Minor details missing (such as the order of problem significance) 	<ul style="list-style-type: none"> ▪ Clearly defined and specific ▪ Problems are stated succinctly and follow a logical order of importance
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

RECOMMENDATIONS Each recommendation is explicitly stated and links to the problem(s) identified. Recommendations are appropriate.			
Insufficient	Adequate	Proficient	Exceptional
Recommendations... <ul style="list-style-type: none"> ▪ missing ▪ unsupported 	Recommendations are... <ul style="list-style-type: none"> ▪ missing or partially complete ▪ partially supported ▪ presented as solutions the clients could undertake 	Recommendations are... <ul style="list-style-type: none"> ▪ mostly supported ▪ linked to problems identified, but there may be better options 	Recommendations are... <ul style="list-style-type: none"> ▪ entirely supported ▪ presented as solutions clients should undertake ▪ presented clearly, link to problems identified, and are considered appropriate solutions
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

ANALYSIS Recommendations are backed up with accurate data.			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> ▪ Superficial analysis ▪ No data 	<ul style="list-style-type: none"> ▪ Limited analysis ▪ Partial data 	<ul style="list-style-type: none"> ▪ Thorough analysis ▪ Data requires very minor adjustments 	<ul style="list-style-type: none"> ▪ Comprehensive analysis ▪ Data supports the recommendations ▪ Error free
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

IMPLEMENTATION Comprehensive timeline and actionable plan/strategy for each recommendation.			
Insufficient	Adequate	Proficient	Exceptional

<ul style="list-style-type: none"> ▪ Missing or lacks detail 	<ul style="list-style-type: none"> ▪ Partially detailed 	<ul style="list-style-type: none"> ▪ Mostly detailed ▪ Minor adjustments required 	<ul style="list-style-type: none"> ▪ Comprehensive plan with milestones ▪ No adjustments required
<p>○ ① ② ③ ④</p>	<p>⑤ ⑥</p>	<p>⑦ ⑧</p>	<p>⑨ ⑩</p>

Thank you!

QUESTION AND ANSWER Handled questions professionally and answers are consistent with recommendations			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> Lacks knowledge, evades questions, or communicates poorly 	<ul style="list-style-type: none"> Partial knowledge Somewhat articulate 	<ul style="list-style-type: none"> Medium to high degree of knowledge Articulate 	<ul style="list-style-type: none"> Demonstrates expertise Communicates clearly and responds respectfully
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

DELIVERY AND PRESENTATION All members of the team are poised and confident during the entire presentation. Presentation completed within time limits. Comprehensive timeline and actionable plan/strategy for each recommendation.			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> Not engaging Not very clear, no flow Presentation driven primarily by one student 	<ul style="list-style-type: none"> Partially engaging Somewhat clear Presentation given by one or two students 	<ul style="list-style-type: none"> Mostly engaging Mostly clear Presentation by most of the students 	<ul style="list-style-type: none"> Very engaging Very clear and flowed really well All members of the team contributed to an effective presentation
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

Total Team Score: ___/60

Areas for Improvement:

Overall Comments:

before returning your evaluation please ensure marks have been given (shaded) for each area

Thank you!