


Student: _____

Rubric: Principles of Finance

Evaluate student proficiency in applying the principles of finance for cases and projects.

Finance 			
	Unacceptable 1 pts	Acceptable 5 pts	Exceptional 10 pts
Quantitative problems 20 %			
i. Work applies principles of finance correctly to quantitative analysis.	Unacceptable Frequent errors or unacceptable mistakes indicative of a lack of understanding of core principle(s).	Acceptable Some errors, but demonstrates understanding of principles.	Exceptional No major errors and any minor errors do not violate principles.
Conceptual problems 20 %			
i. Work applies principles of finance correctly in discussing results, conclusions, and/or recommendations.	Unacceptable Write-up/Discussion reflects lack of basic understanding of principles.	Acceptable Write-up/discussion reflects basic understanding, but not deep understanding of principals.	Exceptional Write-up/discussion reflects a deep understanding of principals.
Financial technology 20 %			
i. Work uses appropriate financial technology to gather information and conduct financial analysis.	Unacceptable Spreadsheet, data sources, and/or financial software is misused or used inappropriately.	Acceptable Spreadsheet, data sources, and/or financial software used appropriately, but not masterfully.	Exceptional Spreadsheet, data sources, and/or financial software used masterfully.
Analyze business situations 20 %			
i. Work demonstrates ability to synthesize complex business situations down to key issues.	Unacceptable Focuses on tangential rather than key issues.	Acceptable Focuses on key issues but spends too much time on some tangential issues.	Exceptional Focuses on key issues and avoids or dismisses tangential issues
ii. Analysis is sufficient to reach reasonable conclusions and recommendations.	Unacceptable Quantitative and qualitative analysis too simplistic or convoluted.	Acceptable Quantitative and qualitative analysis is adequate to make reasonable conclusions and/or recommendations.	Exceptional Quantitative and qualitative analysis persuasively supports the recommendations and conclusions.

iii. Work makes convincing recommendations and draws sound conclusions.	Unacceptable Conclusions and recommendations are wrong or implausible.	Acceptable Conclusions and recommendations are reasonable and believable.	Exceptional Conclusions and recommendations are convincing.
Communicate financial analysis 20 %			
i. Writing demonstrates ability to clearly and accurately communicate complex financial analysis.	Unacceptable Frequently misuses terms, misinterprets findings, and/or miscommunicates methods. Grammar and spelling errors are commonplace.	Acceptable Makes a few minor errors in using terms, interpreting findings, and/or communicating methods. Contains a number of grammar and spelling errors.	Exceptional Uses terms correctly. Clearly and accurately interprets findings and communicates methods. Contains few or no grammar and/or spelling errors.
ii. Oral presentation demonstrates ability to clearly and accurately communicate complex financial analysis.	Unacceptable Frequently misuses terms, misinterprets findings, and/or miscommunicates methods.	Acceptable Makes a few minor errors in using terms, interpreting findings, and/or communicating methods.	Exceptional Uses terms correctly. Clearly and accurately interprets findings and communicates methods.

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