

F4I-i3C Investment Rubric
Company Name/ Business Plan Title
Judge/ Assessor's Name
Date



Scoring Scale	Total
Exemplary	90-100
Acceptable	75-89
Needs Improvement	50-74
Inadequate/Incomplete/ Not submitted	0-49

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Section 1 Written: Executive Summary (10% of score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	

*Business Name/ Logo/ Slogan* Unique name and custom logo and slogan for business is evident

*Business Name*

*Grab/ Hook/ Statistics* Clearly captures the audience/ judges attention with a compelling introduction.

*1.A Problems* Explain how your business will solve an existing problem or fulfill a need that is not being met by other products or services

*1.B. Solution: Description of Product/ Service/ App* Clear description of what the company will sell.

*1.B Solution: Features* What makes their product special, different or unique?

*1.C Customer Overview* Who will use/ pay for your product? Business to Business or Business to Consumer

*1.D Future Vision of Company* What is a summary of where the owners envision this company going or becoming?

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Section 2 Written: Company Description (10% of score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	

*2.A Company Mission Statement & Social Impact* Mission statement and plans for social impact embedded into the opportunity; clearly connected to why the business exists with research to support.

*2.B Executive Team/ Owners Roles and Responsibilities/ Time Management* Compelling explanation of your relevant accomplishments, group affiliations, leadership positions, and past experiences which will convince judges you're capable of starting and running your business.

*2.C Executive Team Time Management* What time to each of the ownership team plan to spend on work and other responsibilities? Why are you/ your team the best investment that is available?

*2.D Legal Structure of Business* Clearly outlines type of business, LLC, Sole Proprietorship/, Partnership, C Corp, S Corp, B Corp, Non-profit

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Section 3 Written: Market Research (10% of score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	

*3.A Industry Description* Clearly defines what industry sector their business falls under and the local and national data around the industry growth

*3.B SWOT Analysis* Comprehensive and realistically demonstrates the company's competitive edge, struggles & solution for weaknesses, plan for capitalizing on profit & growth opportunities , & identified threats to business.

*3.C Primary Customers* Outlines detailed description of their primary customer, including demographics, geographics, psychographics and buying patterns

*3.D Market Analysis: Target Consumer* Has correct Industry Sector, NAICS industry code and recent annual industry sales as well as a reliable source

*3.D Market Analysis: Target Consumer* Geographical Target Market area for launch is feasible and within the Monterey/ Santa Cruz counties

*3.E Company Competitive Advantages* Clearly defines 2 direct and 1 indirect competitor, and compares 4 factors that show their feasibility in the market

*3.F Regulations* Presentation clearly outlines a knowledge of relevant regulations that must be met to operate a business in Monterey or Santa Cruz counties

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Section 4 Written: Product /Service Line (10% of score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	

*4.A Product/ Service Detailed Description* Indirect and direct competitors clearly described including strengths and weaknesses for each. feedback/testimonials.

*4.B Pricing Structure* Key outline of what your company does. Evidence of what owners need to have your company run successfully?

*4.C Intellectual Property Rights* Clear evidence of who the company will work with both for sales as well as for materials and consumer engagement

*4.D Research & Development* Engaging and convincing explanation of competitive advantage to show how business is unique with customer

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Section 5 Written: Marketing &amp; Sales (10% of score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	
5.A Growth Strategy	Defines plan for increasing sales and revenue in the upcoming year.					
5.B Distribution Channels	Outlines with clarity the way the product or service will be delivered to consumers/ end users.					
5.C Promotional Mix Marketing and Sales Samples	Presents a realistic and clear channels and budget for promotional mix					
5.D Sales Strategies	Outlines with clarity what the company plan is to build clientele and solidify sales and consumers now and in the near future.					

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Section 6 Written: Business Financials Business Financials Part A (10% of score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	
6.A Cost of Materials and Labor	Can define the basic COGS/ COSS for their primary unit of sale					
6.B Economics of One Unit of Sale	The economics of one unit of the primary product, and contribution unit for one unit.					
6.C Average Monthly Fixed Expenses	Monthly fixed expenses are realistic and reflect the plan of the company and regional cost factors					
6.D Proposed Working Facility	Business plan has a clear vision for what their workspace plan will look like in the present and with future vision					
6.E Monthly Sales Projections	Shows the realistic annual sales projections for Y1, addresses seasonal surges.					
6.F Projected Monthly Break Even	Demonstrates and understanding of their costs and what it will take in sales for the business to break-even monthly					

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Section 6/7 Written: Business Financials Business Financials Part B (10% of score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	
6.G Projected Yearly Income Statement	Accurately outlines the basics of their projected yearly income for the upcoming year.					
6.H Projected Start-Up Expenditures	Outlines costs of what this student needs to start the business based on the presented plan.					
6.I Return on Sales / Return on Investment	Accurately, based on projected units, and presented plan, has a projected Y1, accurate return on investment					
6.J Financing Strategy	Presents a realistic financing strategy to start the business in Monterey/ Santa Cruz Counties.					
7. Future Plans	Compelling explanation of your future plans that shows investors you understand the opportunities for growth in the long term.					

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Innovation / Uniqueness of Idea (10% of score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	
Business shows unique innovation, perspective and independent thinking. Students showcase themselves as creative problem solvers, and have gathered evidence that their idea is different than current offerings.						

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Presentation: PDF Slide Deck &amp; Recorded Video of Presentation/ Presentation Skills &gt;20 min (10% of Score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	
Slide Deck covers all sections of A-S per requirements. Graphics, personal branding and data are specific and customized to the business brand.						
Video presentation covers all aspects of the rubric and / business plan in a video showcase of the pitch. Industry-relevant evidence of sections in the written are addressed						

Judge/ Assessor's Comments:

Criteria	Incomplete: Information Not Available	Below Expectations	Average/ Some Evidence of Understanding	Meets Expectations	Exceeds Expectations	My Score:
<b>Advertising: 1 Minute Commercial /Elevator Pitch (10% of Score)</b>	<b>0-2</b>	<b>3-4</b>	<b>5-6</b>	<b>7-8</b>	<b>9-10</b>	
Commercial/Elevator Pitch is persuasive, uses advertising techniques to pitch or persuaded buyers/ end users to purchase/ engage with brand or product. Unit of Sale is clearly and specifically reflected.						

Judge/ Assessor's Comments:

<b>Total Points</b>	
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Additional Notes/ Feedback: