2013 Competitive Proposal for Core-Operating Advocacy: Rating Rubric

Organization Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Reviewer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Decision: ACCEPT \_\_\_\_ DECLINE \_\_\_\_

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|  | OP (20) | ODM (5) | AA (10) | PC (15) | PU (30) | EV (10) | SU (10) | TL (100) |
| REV1 |  |  |  |  |  |  |  |  |
| REV2 |  |  |  |  |  |  |  |  |

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| **Category** | **Included** | **Quality** | | | |
| **E**  **(16-20)** | **G**  **(11-15)** | **F**  **(6-10)** | **P/M**  **(0-5)** |
| **Organizational Profile (20 Points)** |  |  |  |  |  |
| 1. Organizational Mission (4) |  | Notes: | | | |
| 1. Brief History of the Organization and its Work (4) |  |
| 1. Governance Structure (4) |  |
| 1. Operational Structure including Staffing and Experience (4) |  |
| 1. How Assess and Monitor Policy Environment (1) |  |
| 1. Recent Successes in policy and advocacy (1) |  |
| 1. Diversity and Inclusion in Governance (2) |  |
| **E = Excellent** if all required elements are present, understandable, and clearly indicate that the organization has strong governance and operations and commitment to diversity in governance; and that the organization has proven experience with advocacy and policy work.  **G = Good** if all required elements are included, understandable and that the organization is strong in at least 5 of the 7 required elements.  **F = Fair** if three or fewer of the required elements are absent and the organization is strong in two or more of the required elements.  **P/M = Poor or Missing** if most or all of the required elements are absent and the organization does not have any apparent strengths in organizational governance, diversity, or history with advocacy/policy work. | | | | | |
| **Category** | **Included** | **Quality** | | | |
| **E**  **(5)** | **G**  **(4)** | **F**  **(2-3)** | **P/M**  **(0-1)** |
| **Organizational Decision Making for Advocacy (5 Points)** |  |  |  |  |  |
| 1. Types of Advocacy Focused On (2) |  | Notes: | | | |
| 1. How Advocacy Agenda is Set (2) |  |
| 1. Issues and Factors influencing Advocacy Agenda (1) |  |
| **E = Excellent** if all required elements are present, understandable, and clearly indicate that organization’s advocacy agenda is set with an inclusive and well-designed process and informed by the current and historical context. At least one element of the advocacy agenda aligns well with the REACH TOC,.  **G = Good** if 2 of the 3 required elements are present, understandable and that the description of how the agenda agenda is established evident and clearly based on an inclusive and informed PROCESS.  **F = Fair** if one or more of the required elements are missing and the PROCESS for setting the advocacy agenda is not fully described.  **P/M = Poor or Missing**  if r all of the required elements are absent and the PROCESS for setting the advocacy agenda is not described, justified or aligned with TOC | | | | | |

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| **Category** | **Included** | | **Quality** | | | | | | | |
| **E**  **(9-10)** | | **G**  **(6-8)** | | **F**  **(3-5)** | | **P/M**  **(0-2)** | |
| **Advocacy Agenda (10 Points)** |  | |  | |  | |  | |  | |
| 1. 2013 Healthcare Advocacy Agenda Described (5) |  | | Notes: | | | | | | | |
| 1. How Advocacy Agenda seeks to Increase Access (5) |  | |
| **E = Excellent** if all required elements are present, understandable, and clearly indicate that organization’s advocacy agenda includes a focus on increasing access to healthcare services and coverage. At least one element of the advocacy agenda aligns well with the REACH TOC,.  **G = Good** if all required elements are present but lacks some details or appears to support increased access but is not explicit.  **F = Fair** if one or more of the required elements are missing and the advocacy agenda is not fully explained but still appears to support increased access.  **P/M = Poor or Missing**  if the required elements are absent OR what is provided does not afford the reviewer enough information to determine if the advocacy agenda supports increased access to care or insurance coverage | | | | | | | | | | |
| **Category** | | **Included** | | **Quality** | | | | | | |
| **E**  **(14-15)** | | **G**  **(10-13)** | | **F**  **(5-9)** | | **P/M**  **(0-4)** |
| **Organizational Partnerships/Collaboration (15 Points)** | |  | |  | |  | |  | |  |
| 1. What networks partner with on health care advocacy (5) | |  | | Notes: | | | | | | |
| 1. How working to expand size and diversity of network (5) | |  | |
| 1. How identify, build and maintain working relationships with targets of advocacy efforts (5) | |  | |
| **E = Excellent** if all required elements are present, understandable, and clearly indicate that the organization is collaborative, building strategic relationships with partners and targets of advocacy  **G = Good** if all required elements are present but lacks some key details about partnership and building relationships.  **F = Fair** if one of the required elements is missing and the narrative lacks many important details or is not fully explained.  **P/M = Poor or Missing**  if 2 or more of the required elements are absent OR what is provided does not afford the reviewer enough information to determine if the organization is partnering, building relationships, or expanding their network. | | | | | | | | | | |

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|  |  | **Quality** | | | | | | |
| **Category** | **Included** | **E**  **(25-30)** | | **G**  **(17-24)** | | **F**  **(8-15)** | | **P/M**  **(0-7)** |
| **Proposed Use of Requested Funds (30 Points)** |  |  | |  | |  | |  |
| 1. Describe proposed use of funds (15) |  | Notes: | | | | | | |
| 1. Describe health advocacy activities you will engage in (15) |  |
| **E= Excellent** if all required elements are present, understandable, and clearly indicate how the funds will be used to support the organization’s mission and advocacy activities.  **G= Good** All of the required elements are included, understandable, but some minor details may be missing.  **F= Fair** All of the required elements are included but are not clear or understandable OR health advocacy activities are not clearly described.  **P/M = Poor or Missing** if 1 or both of the required elements are missing OR the narrative that is included is not sufficient to determine how the funds will be used and the health advocacy activities are missing. | | | | | | | | |
| **Category** | **Included** | **Quality** | | | | | | |
| **E**  **(9-10)** | **G**  **(6-8)** | | **F**  **(3-5)** | | **P/M**  **(0-2)** | |
| **Evaluation (10 Points) How you will document . . .** |  |  |  | |  | |  | |
| * 1. Improvements in your organization’s advocacy capacity? (5) |  | Notes: | | | | | | |
| * 1. tactical progress toward advancing your advocacy agenda? (3) |  |
| * 1. impact your advocacy efforts during the grant term? (2) |  |
| **E = Excellent** **if all required elements are present**, understandable, and fully described, Logical consistency is evident throughout.  **G = Good** if **all required elements are present**, understandable, fully described. One or more elements are less concretely described or thought out OR indicators or metrics are not logically consistent.  **F= Fair** if 1 required element is missing, inadequately developed or described OR if indicators or metrics are unrealistic or not meaningful or logically consistent.  **P/M = Poor or Missing** if 2 or more of the required elements are absent OR what is provided is inadequate to assess the evaluation approach. | | | | | | | | |

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|  |  | **Quality** | | | |
| **Category** | **Included** | **E**  **(9-10)** | **G**  **(6-8)** | **F**  **(3-5)** | **P/M**  **(0-2)** |
| **Sustainability (10 Points)** |  |  |  |  |  |
| 1. Describe how you have diversified funding (4) |  | Notes: | | | |
| 1. Status of business plan (1) |  |
| 1. Status of strategic plan (2) |  |
| 1. Status of fund development plan (1) |  |
| 1. Leadership development plan (2) |  |
| 1. Other elements: succession plan, retaining key leaders, programming plan, plan to develop public-private partnership, and using evaluation to be a learning organization (**optional: add +1 for each additional**) |  |
| **E = Excellent** if all required elements are present, understandable, and clearly indicate that the organization has already begun implementing at least 4 of the 5 sustainability dimensions. Response indicates that the applicant has seriously considered the meaning and importance of sustainability and may have adopted a sustainability framework. Applicant concretely describes previous, current, and planned efforts to Diversify funding and has a current strategic plan, leadership development plan, business and fund development plans.  Advanced organizations will have already started creating new public-private partnerships, engage stakeholders in meaningful discussions about sustainability, and have plans to put remaining sustainability dimensions in place in the near term). Evaluation appears to be a key strategy to drive organizational and program improvement.  **G = Good** if applicant’s response includes all the required elements, is understandable and clearly indicates that the organization has begun sustainability planning --- but is not yet implementing 3 or more of the 5 sustainability dimensions. Applicant has described at least one effort to diversify funding and/or create new public-private partnerships; and evaluation is used by the organization but may not yet be driving organizational improvement efforts.  **F= Fair** if applicant’s response is missing 3 or more of the required 5 elements (dimensions) OR the response indicates that the applicant has only superficial understanding of sustainability. Applicant may propose to begin creating sustainability plans but limited efforts have been undertaken to try to diversify funding OR create new public-private partnerships; evaluation is rarely used by the organization.  **P/M = Poor or Missing** if 4 or more of the required elements are missing and what is provided indicates that the applicant has not yet considered sustainability planning. No efforts to diversify funding, update strategic plan, or develop a leadership development plan; or create new public-private partnerships have occurred; evaluation is not used in programming or organizational improvement. | | | | | |