2013 Competitive Proposal for Advocacy Program: Rating Rubric

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

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

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|  | OP (14) | ODM (6) | AA (5) | OPC (10) | PN (10) | PD (30) | KP (5) | EV (10) | SU (10) | TL (100) |
| REV1 |  |  |  |  |  |  |  |  |  |  |
| REV2 |  |  |  |  |  |  |  |  |  |  |

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| **Category** | **Included** | **Quality** |
| **E****(12-14)** | **G****(9-11)** | **F****(6-8)** | **P/M****(0-5)** |
| **Organizational Profile (14 Points)** |  |  |  |  |  |
| 1. Organizational Mission (3)
 |  | Notes: |
| 1. Brief History of the Organization and its Work (2)
 |  |
| 1. Governance Structure (3)
 |  |
| 1. Operational Structure including Staffing and Experience (2)
 |  |
| 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****(6)** | **G****(4-5)** | **F****(2-3)** | **P/M****(0-1)** |
| **Organizational Decision Making for Advocacy (6 Points)** |  |  |  |  |  |
| 1. Types of Advocacy Focused On (2)
 |  | Notes: |
| 1. How Advocacy Agenda is Set (2)
 |  |
| 1. Issues and Factors influencing Advocacy Agenda (2)
 |  |
| **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****(5)** | **G****(4)** | **F****(2-3)** | **P/M****(0-1)** |
| **Advocacy Agenda (5 Points)** |  |  |  |  |  |
| 1. 2013 Healthcare Advocacy Agenda Described (2)
 |  | Notes: |
| 1. How Advocacy Agenda seeks to Increase Access (3)
 |  |
| **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****(9-10)** | **G****(6-8)** | **F****(3-5)** | **P/M****(0-2)** |
| **Organizational Partnerships/Collaboration (10 Points)** |  |  |  |  |  |
| 1. Other organizations partner with on health care advocacy (3)
 |  | Notes: |
| 1. How working to expand size and diversity of network (4)
 |  |
| 1. How identify, build and maintain working relationships with targets of advocacy efforts (3)
 |  |
| **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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| **Category** | **Included** | **Quality** |
| **E****(9-10)** | **G****(6-8)** | **F****(3-5)** | **P/M****(0-2)** |
| **Problem or Need (10 Points)** |  |  |  |  |  |
| 1. Problem or Need Project Addresses (5)
 |  | Notes: |
| 1. Current gaps in advocacy efforts (2)
 |  |
| 1. How project closes the gap (3)
 |  |
| **E = Excellent** if all required elements are present, understandable, and clearly indicate that the rationale and context for the project is strong, and that there is a clear community need.**G = Good** if all the required elements are present and understandable BUT the gap is overstated or not well informed**F = Fair** if one or more of the required elements are missing and the project rationale is weakly justified or uninformed.**P/M = Poor or Missing**  if two or more of the required elements are absent and the problem or need is not described, justified or aligned with TOC |
|  |  | **Quality** |
| **Category** | **Included** | **E****(25-30)** | **G****(17-24)** | **F****(8-15)** | **P/M****(0-7)** |
| **Project Description (30 Points)** |  |  |  |  |  |
| 1. **Goals you plan to achieve** (4)
 |  | Notes: |
| 1. Description of how the project aligns with REACH TOC (4)
 |  |
| 1. **Target Population** (number, demographics) (4)
 |  |
| 1. Planned **Project Activities and Services** (4)
 |  |
| 1. **Timeline** with specific dates or timeframes (4)
 |  |
| 1. Collaborators and Partners **and** their Roles in the Project (3)
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| 1. **How project incorporates cultural competence** (4)
 |  |
| 1. **Effectiveness** to Date (Rate if existing project only) (+/-1)/NA
 |  |
| 1. **Risks of this Project** for Org and Constituents (3)
 |  |
| **E= Excellent** if all required elements are present, understandable, and clearly indicate that the project is well designed, delivers needed advocacy for a specific policy objective or target population using culturally competent methods; and advocacy goals are aligned to the REACH TOC**G= Good** All but 1 of the required elements are included, understandable, and that the purpose, advocacy efforts and target population are strong elements of the proposed project. Advocacy goals are aligned with the REACH TOC**F= Fair** if 2 or more of the required elements are not included and the project appears to deliver needed advocacy focus to a defined polich objective or target population but lacks a well thought out plan of action (project activities and timeline). Advocacy goals proposed appear to be aligned with TOC**P/M = Poor or Missing** if most or all of the required elements are missing and the project as described does not have any apparent strengths in purpose, plan of action, cultural competence, or partnerships. Cannot assess - based on narrative - whether the project goals are aligned with REACH TOC |

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| **Category** | **Included** | **Quality** |
| **E****(5)** | **G****(3-4)** | **F****(1-2)** | **P/M****(0)** |
| **Key Personnel (5 Points)** |  |  |  |  |  |
| 1. Key Personnel who lead and carry out project (2)
 |  | Notes: |
| 1. Key personnel experience and credentials for this project (2)
 |  |
| 1. Tasks/responsibilities of key personnel in organization (1)
 |  |
| **E = Excellent** if all required elements are present, understandable, and clearly indicate that the personnel leading the project are well-qualified in project management, experienced with the project type, advocacy efforts to be executed, and target population. Tasks and responsibilities for key personnel are described.**G = Good** if all but 1 required elements are present, understandable, and that key personnel appear to be appropriate choices to lead the project. Descriptions of credentials, experience, tasks/responsibilities of key personnel are present but inadequately described.**F= Fair** if two of the required elements are missing and/or the key personnel may be inadequate to carry out the project given their experience with the population, project activities, and responsibilities. **P/M = Poor or Missing** if all of the required elements are missing and what is provided is inadequate to assess the capacity of key personnel to lead this project. |
| **Category** | **Included** | **Quality** |
| **E****(9-10)** | **G****(6-8)** | **F****(3-5)** | **P/M****(0-2)** |
| **Evaluation (10 Points) How evaluate . . .** |  |  |  |  |  |
| * 1. contribution to organization’s advocacy capacity? (2)
 |  | Notes: |
| * 1. tactical progress toward your advocacy goal? (3)
 |  |
| * 1. impact on your target population? (2)
 |  |
| * 1. How define “success” for this project? (3)
 |  |
| **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 or 2 required elements are missing, inadequately developed or described OR if indicators or metrics are unrealistic or not meaningful or logically consistent. **P/M = Poor or Missing** if most or all 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. |