Appendix H

Community Opportunities Fund
Policy and Advocacy Proposal Narrative Review Tool

The following tool will be used to score proposal narratives, and may be used as a reference when preparing your proposal narrative.

SECTION 1: PROJECT DESCRIPTION

1. Does the project address a priority COF Policy Goal?
   ✓ The project addresses a priority policy issue (in bold in RFP, p. 4-5).
     _____ 0 – No
     _____ 4 – Yes

2. Does the applicant’s project summary convey the overall approach?
   ✓ Summary clearly describes overall project plan.
   ✓ Project concept is well-formulated.
     _____ 0 – None or not clearly described or well-formulated
     _____ 1 – Described and formulated adequately
     _____ 2 – Described clearly, well-formulated

3. Does the applicant articulate the change or outcomes that will occur as a result of the project?
   ✓ Applicant clearly describes the change that will result from the project.
   ✓ Change described connects logically to policy goal and activities.
     _____ 0 – No or is vaguely described
     _____ 1 – Described with some detail and connects somewhat to project activities and policy goal
     _____ 2 – Described in detail and connects well to activities and goal.

4. Are the changes or outcomes viable given the project?
   ✓ Changes or outcomes identified can be achieved within the timeframe of the project and can be accomplished based on the proposed activities.
     _____ 0 – Not viable
     _____ 1 – Somewhat viable
     _____ 2 – Viable

5. Are project activities described?
   ✓ Sufficient information regarding proposed activities is provided (what, when, who), clear, is logical.
   ✓ If a collaborative, the proposal describes how each of the partners will contribute to the project.
     _____ 0 – No or is vaguely described
     _____ 1 – Described adequately
6. **Are project activities realistic?**
   - Proposed activities are realistic in terms of timing, or could be delivered in the timeframe proposed.
   - Applicant indicates it has the necessary resources to implement the activities.
     - 0 – Not realistic
     - 1 – Somewhat realistic
     - 2 – Realistic

7. **Has the applicant identified appropriate benchmarks that will be achieved?**
   - The organization identifies benchmarks for success for primary short-term and intermediate outcomes that are specific, achievable, and realistic.
     - 0 – Weak identification of benchmarks
     - 1 – Adequate identification of benchmarks
     - 2 – Strong identification and specificity of benchmarks

8. **Does the applicant identify the policy and advocacy tools that will be utilized and are the tools appropriate?**
   - Specific policy and/or advocacy tools such as media, reports, coalition building, legislative visits, etc. are identified
   - Tools appear appropriate for achieving the proposed outcomes
     - 0 – None or vaguely identified
     - 1 – Tools identified
     - 2 – Tools identified and appropriate to outcomes

9. **Does the applicant identify the policy target?**
   - Applicant identifies the decision-maker, system(s), or organization(s) that will be targeted by the project to accomplish the policy goal.
   - Applicant identifies the appropriate policy target given the project strategy
     - 0 – Not identified or weak identification
     - 1 – Adequate identification and some experience
     - 2 – Strong identification of policy targets

10. **Does the applicant have past experience with the policy target?**
    - Applicant has engaged in policy or advocacy work that sought to influence the decision-maker, system or organizations targeted by the project in the past
      - 0 – No or limited past experience
      - 1 – Some past experience
      - 2 – Substantial past experience
SECTION 2  PROJECT RATIONALE

11. Does the applicant describe the community conditions the policy and/or advocacy effort will address?
   ✓ Applicant provides a clear description of the community conditions affected by the policy issue including location, population, demographics and other needs.
   ✓ Community conditions would likely be addressed through the selected policy goal.
   ✓ Applicant has a strong understanding and knowledge of the community conditions and their relationship to their policy issue
      _____ 0 – Weak description and understanding
      _____ 1 – Adequate description and understanding
      _____ 2 – Strong description and understanding

12. Did the applicant take an intentional and systematic approach to developing the project?
   ✓ The applicant provides evidence of utilizing a process to identify policy issues and to inform the design of the proposed project.
      _____ 0 – No evidence of a reasoned identification of issues or selection of project
      _____ 1 – Some discussion or process utilized
      _____ 2 – Organization utilized a thorough approach to determining issues and selecting or designing a project to address those issues

13. Does the applicant describe and demonstrate an understanding of the current political/policy environment?
   ✓ The applicant effectively describes the current environment related to the policy issue including how the environment may impact the project as well as barriers, challenges.
      _____ 0 – Weak understanding
      _____ 1 – Some understanding
      _____ 2 – Strong understanding

14. Does the described policy environment support the strategy selected?
   ✓ The current state of the policy environment (problem identification formulation, adoption, etc.) related to the policy issue is reflected in the strategy selected for the project
      _____ 0 – Environment does not support the strategy
      _____ 1 – Environment somewhat supports the strategy
      _____ 2 – Environment strongly supports strategy
15. **Does the applicant have the capacity and readiness to implement the project?**

- The applicant indicates organizational strengths and resources necessary to successfully implement the proposed project.
- Applicant provides policy and/or advocacy experience related to the policy goal.

   - 0 – Does not have capacity or does not address
   - 1 – Some capacity
   - 2 – Strong capacity

16. **Does the applicant have the appropriate resources to implement the project and how the grant will help them to secure additional resources needed?**

- Applicant indicates existing resources such as data, staff, etc. that will realistically lead to accomplishment of activities and the goal.
- Applicant indicates how the grant will help secure financial or other resources needed for the project.

   - 0 – Does not have appropriate resources
   - 1 – Adequate resources
   - 2 – More than enough resources

17. **What is the overall viability of the project to achieve the policy goal?**

- Based upon the overall narrative including summary, activities, change to be achieved, benchmarks, evaluation methods, etc., the project is likely to be successfully implemented.

   - 0 – Most likely will not be successful
   - 1 – Likely to be successful
   - 2 – Very likely to be successful

### SECTION 3: PROJECT EVALUATION AND MONITORING

18. **Does the applicant identify appropriate data and methods to collect?**

- The organization has identified data measures that correlate with the described benchmarks.

   - 0 – Not identified or not clearly articulated
   - 1 – Identified and somewhat matched to benchmarks
   - 2 – Identifies a robust set of data indicators well matched to the benchmarks

19. **Will the applicant incorporate evaluation results?**

- The organization has a well-developed plan for incorporating lessons learned from evaluation results into ongoing work.

   - 0 – No plan for incorporating evaluation results
   - 1 – Some plan for incorporating evaluation results
2 – Strong plan indicating effective utilization of evaluation and incorporation of lessons learned into ongoing planning efforts and implementation

19. Will the plan for incorporating evaluation results in the program/project result in its improvement or ongoing learning?
   - 0 – Will not result in improvement or learning
   - 1 – May contribute to improvement or learning
   - 2 – Likely to result in improvement or learning

20. Does the applicant describe who will evaluate the project?
   ✓ The applicant indicates whether or not external or internal resources will be used to evaluate the project.
   - 0 – Does not describe
   - 1 – Adequate description
   - 2 – Strong description

SECTION 4: COLLABORATION

Note: This section is required only of applicants applying as a collaborative.

21. Is the collaborative relationship clearly defined and developed?
   ✓ The applicant clearly identifies the primary members of the collaborative.
   ✓ There is evidence that the collaborative has thoroughly developed the structure of its relationship and the role of partners in the project.
   - 0 – Collaborative is weakly defined and developed
   - 1 – Collaborative is adequately defined and developed
   - 2 – Collaborative relationship is clearly defined developed

22. Does the collaborative add value to the project?
   ✓ The applicant clearly identifies the benefit of the project being implemented by a collaborative as opposed to a single organization.
   - 0 – No or little benefit identified
   - 1 – Some benefit identified
   - 2 – Strong benefit identified