

## OEA Choice Trust Competitive Grant Review Scoring Rubric

**Applicant:**

**Funding Period:** July 2016 – June 30, 2017

**Date:**

**Applicant's Total Score:** \_\_\_\_ (81 maximum available)

*This scoring rubric will be used for the OEA Choice Trust School Employee Wellness competitive grant review process to score grant applications. The scoring guide is designed to encourage reliable scoring of applications. Reviewers should carefully follow the rating guidance below to improve the reliability of their scores as well as consider strengths and weaknesses when assessing grant applications. OEA Choice Trust grant priorities are based on the following conditions:*

- Align with OEA Choice Trust funding priorities
- Demonstrate a readiness to implement employee wellness program
- Demonstrate collaboration among school employees, District and school level administration, and Union leaders
- Design a comprehensive approach with a focus on creating a healthy environment through system, policy and practices
- Demonstrate the ability to build capacity and sustain their employee wellness program beyond the grant period

The following scale can be used as a guideline when assigning scores to each grant proposal criterion.

**Excellent:** All components clearly addressed, concise and thoroughly developed. Exceptionally strong with essentially no weaknesses

**Adequate:** Components adequately addressed and acceptable. Missing some detail and with at least one weakness

**Inadequate:** Few, if any, components are addressed. Very few strengths and numerous weaknesses

Grant Application Section	Section Max Point Value	Application Section Total Score	Recommendations
1. Grant Application Cover Sheet	Required: no points	<input type="checkbox"/> Section completed <input type="checkbox"/> All signatures	
2. Program Title and Summary	9		
3. School/District & Community Description	6		
4. Employee Health Needs	6		
5. Program Description	15		
6. Smart Objectives and Action Plan	15		
7. SEW project coordinator	6		
8. Measure of Success	6		
9. Sustainability Plans for SEW	3		
10. Project Budget	12		
11. <u>Required:</u> Letters of Support	3	<input type="checkbox"/> Letters included	Quality of letters and support
<b>Total Score for Applicant:</b>			
<b>Overall Appraisal and Comments:</b> Please clearly identify major strengths and gaps, pertinent issues and any additional comments. Please identify any follow up questions you think the OEA Choice Trust Board should address in their review.			

Program Title and Summary				
Criteria	Points Awarded			Score
	Inadequate: requires additional information <b>0-1</b>	Adequate: clear and complete <b>2</b>	Excellent: concise and thoroughly developed <b>3</b>	
Section complete	Section is incomplete		Section is complete	
All school employee sectors will be served & have access to wellness program	<ul style="list-style-type: none"> <li>Only one school employee sector or group is identified and has access to wellness program</li> </ul>	<ul style="list-style-type: none"> <li>Certified and Education Support Professional employees are identified and have access to wellness program</li> </ul>	<ul style="list-style-type: none"> <li>All school employee sectors are served and have access to wellness program to include, District office, Certified staff, Education Support Professionals, Administrators, Food service staff, Maintenance and Transportation staff (as applicable)</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>All school employees from various sectors are included in a pilot program with a minimum of 100 employee reach (<i>see eligibility requirements in grant application</i>)</li> </ul>	
Description of why SEW program matters to their school community	<ul style="list-style-type: none"> <li>No description is provided</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>marginal description is provided</li> </ul>	<ul style="list-style-type: none"> <li>Satisfactory description is provided</li> </ul>	<ul style="list-style-type: none"> <li>Very Good description is provided</li> </ul>	
Reviewer Comments: Strengths, Weaknesses, Required Changes				Total Score:

School/District and Community Description				
Criteria	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
Description of District and Community <ul style="list-style-type: none"> <li>• Mission &amp; vision</li> <li>• Staff population</li> <li>• Student population</li> <li>• Key facts that describe District</li> <li>• Number of schools</li> <li>• Geographic information &amp; community description</li> </ul>	<ul style="list-style-type: none"> <li>• No information</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>• very little information is provided to describe District and Community</li> </ul>	<ul style="list-style-type: none"> <li>• Moderate information is provided to describe District and Community</li> </ul>	<ul style="list-style-type: none"> <li>• Ample, detailed information is provided to describe District and Community</li> </ul>	
Past SEW efforts and programs	<ul style="list-style-type: none"> <li>• No information is provided about past efforts to support staff wellness</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>• Very limited information is provided about staff or student wellness efforts</li> </ul>	<ul style="list-style-type: none"> <li>• Moderate information is provided about staff wellness efforts</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>• Moderate information provided about student wellness efforts that demonstrate a commitment to wellness</li> </ul>	<ul style="list-style-type: none"> <li>• Complete information is provided about past efforts to implement SEW program to include:               <ul style="list-style-type: none"> <li>✓ Wellness committee</li> <li>✓ SEW activities and programs</li> <li>✓ Success stories</li> </ul> </li> </ul>	
Reviewer Comments: Strengths, Weaknesses, Required Changes				Total Score

Employee Health Needs				
Criteria: OEA CT SEW Priority Areas:	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
Key health & wellness needs identified <ul style="list-style-type: none"> <li>Physical fitness</li> <li>Healthy eating</li> <li>Healthy body weight</li> <li>Manage chronic conditions: blood pressure, cholesterol, diabetes and depression</li> <li>Stress and Resilience</li> </ul>	<ul style="list-style-type: none"> <li>Key health &amp; wellness needs, issues, risk factors or interests were not identified</li> <li>Health &amp; wellness needs were identified but do not align with OEA CT priority areas</li> </ul>	<ul style="list-style-type: none"> <li>Key health &amp; wellness needs, issues, risk factors or interests were identified but lacked clarity</li> </ul>	<ul style="list-style-type: none"> <li>Clear, relevant health and wellness needs, issues, risk factors, and interests were identified</li> </ul>	
Relevant data to support the need for employee health and wellness and identified health issues, risk factors, and interests <i>Potential data sources:</i> <ul style="list-style-type: none"> <li>Staff wellness interest and needs survey</li> <li>Human Resource data and information</li> <li>County Health Rankings</li> <li>Past health screening aggregate data</li> <li>Health Risk Assessment aggregate data</li> <li>OEBB's Behavioral Risk Factor Survey of School Employee state level data</li> <li>County Public Health data</li> <li>Other relevant data sources can be used to support the need for SEW</li> </ul>	<ul style="list-style-type: none"> <li>Very little or no data is used to support identified health and wellness needs</li> </ul>	<ul style="list-style-type: none"> <li>Limited data is provided to support health and wellness needs</li> </ul>	<ul style="list-style-type: none"> <li>Data provided is clear, concise, and supports identified health and wellness needs</li> </ul>	
Reviewer Comments: Strengths, Weaknesses, Required Changes				Total Score

Program Description				
Criteria	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
<p>Long term goal of SEW program</p> <ul style="list-style-type: none"> <li>Describes the results the school employee wellness program is aiming to achieve over the 5-year grant period.</li> </ul>	<ul style="list-style-type: none"> <li>Proposal fails to include clear school employee wellness goal(s)</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>Proposal includes school employee wellness goal(s) but goal(s) are vague and confusing</li> </ul>	<ul style="list-style-type: none"> <li>Proposal includes school employee wellness goal(s) but unclear how it ties to identified employee health and wellness needs</li> </ul>	<ul style="list-style-type: none"> <li>Proposal includes clear school employee wellness goal(s) that are aligned with identified employee health and wellness needs</li> </ul>	
<p>Active leadership support</p> <ul style="list-style-type: none"> <li>Employee wellness is integrated into education vision and goals as a key function of school improvement and student success</li> <li>Employee wellness program is aligned with employee morale, recruitment and retention strategies</li> <li>Dedicates necessary resources to a coordinated approach to School Employee Wellness (SEW), such as staff, time, funds, and leveraging community partners</li> <li>Officially selects one staff person with dedicated time and authority to oversee a coordinated approach to SEW program.</li> <li>Superintendents, School Board members, Principals, Union leaders regularly communicate the importance of wellness to all staff, students and community members</li> <li>Leadership actively participates in District SEW Program</li> <li>Based on workplace wellness audit, leadership develops, supports, and implements health promotion policies/practices (or could be policies and practices) and plans to create a culture of health for staff and students.</li> </ul>	<ul style="list-style-type: none"> <li>Minimal or no description of the leadership support is provided</li> </ul>	<ul style="list-style-type: none"> <li>A description of leadership involvement and support for SEW is provided, but it lacks either details or depth in how support is given</li> </ul>	<ul style="list-style-type: none"> <li>A clear and thorough description of leadership involvement and support for SEW is provided</li> <li>Active multi-level leadership support and collaboration throughout the organization (District, school, Union, ESD, School Board, Community College senior and department leaders)</li> </ul>	
<p>School employee involvement in planning and implementing SEW program</p> <ul style="list-style-type: none"> <li>Staff wellness interest survey has been administered and results used to identify interests and needs</li> <li>A wellness committee exists with diverse representation from all employee sectors to inform planning &amp; implementation</li> <li>Clear description of how the employee wellness committee will serve in an advisory role to this grant and SEW program</li> <li>Staff needs and interests are considered when designing SEW program so that the program is staff driven and supported by leadership</li> </ul>	<ul style="list-style-type: none"> <li>No information was provided that describes how school employees were involved</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>Very little information is provided to support that school employees were involved</li> </ul>	<ul style="list-style-type: none"> <li>Evidence is provided to support that school employees were involved such as administration of staff wellness need and interest survey or existing wellness committee with staff representation from most employee sectors</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>Plans in place to form an employee wellness committee with representation from &amp; District &amp; school</li> </ul>	<ul style="list-style-type: none"> <li>There is clear and convincing information provided to support that school employees are significantly involved with multiple opportunities to provide input</li> </ul>	

		buildings to inform planning and implementation • Plans in place to survey staff about their wellness needs and interests		
<p>SEW communication plans and strategies to promote program</p> <p>Effectiveness Hierarchy</p> <ul style="list-style-type: none"> <li>• Face to Face strategies; champions</li> <li>• Brands and logos are created to market SEW</li> <li>• Announcements during staff meetings</li> <li>• Written-individual notices</li> <li>• Stall talk notices</li> <li>• Newsletters</li> <li>• Websites</li> <li>• Email Messages</li> <li>• Bulletin Boards</li> <li>• Payroll Inserts</li> </ul>	<ul style="list-style-type: none"> <li>• Communication strategies lack detail and are primarily focused on efficiency such as email and website strategies</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Very limited plans in place to communicate successes and lessons learned to key stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Program plans include a specific SMART objective and action plan to develop an effective communication plan to reach all school employees</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>• Communication strategies move beyond emails by increasing use of proven effective promotional strategies</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Plans in place to communicate successes and lessons learned to key stakeholders but lacks detail</li> </ul>	<ul style="list-style-type: none"> <li>• Strong and creative communication plan with a variety of strategies to effectively reach ALL employees</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Plans in place to communicate successes and lessons learned to specific stakeholder groups such as school employees, Administration, School Board and community members</li> </ul>	
Community partnerships	<ul style="list-style-type: none"> <li>• Few potential partners are identified or unclear how identified partners will support SEW program</li> </ul>	<ul style="list-style-type: none"> <li>• Potential partners are clearly identified and clear explanation of how support will be provided</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>• In process of developing external and internal partnerships to leverage resources for SEW</li> </ul>	<ul style="list-style-type: none"> <li>• Community partnerships in place to support SEW program</li> <li>• Clear detailed description of how community partners will continue to provide support and resources for SEW</li> </ul>	
Reviewer Comments: Strengths, Weaknesses, Required Changes				Total Score

SMART Objectives and Action Plan				
Criteria	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
SMART Objectives are linked to long term SEW goals	<ul style="list-style-type: none"> <li>SMART objectives are not linked to long term SEW goals and need development</li> </ul>	<ul style="list-style-type: none"> <li>Most of the SMART objectives are linked to long term SEW goals</li> </ul>	<ul style="list-style-type: none"> <li>All SMART objectives are clearly linked to long term SEW goals</li> </ul>	
SMART Objectives are specific, measurable, achievable, relevant, and time-phased	<ul style="list-style-type: none"> <li>SMART Objectives are not specific, measurable, achievable, relevant or time phased and need development</li> </ul>	<ul style="list-style-type: none"> <li>Most SMART objectives are specific, measurable, achievable, relevant, and time phased</li> <li>SMART objectives may have some weaknesses to address</li> </ul>	<ul style="list-style-type: none"> <li>All SMART objectives are specific, measurable, achievable, relevant and time phased</li> </ul>	
Action Plan is directly tied to SMART objectives and well planned to serve as a roadmap for successful implementation of SEW program	<ul style="list-style-type: none"> <li>Action plan(s) do not align with stated SMART objective(s)</li> <li>Action plan(s) reflect a lack of understanding of effective school employee wellness strategies</li> </ul>	<ul style="list-style-type: none"> <li>Action plan(s) align with most stated SMART objective(s)</li> <li>Action plan(s) reflects only a modest understanding of effective school employee wellness strategies</li> <li>Action plan(s) are mostly complete but lacks some detail or clarity to support successful implementation</li> </ul>	<ul style="list-style-type: none"> <li>Action plan(s) clearly align with all stated SMART objective(s)</li> <li>Action plan(s) reflects a clear understanding of effective school employee wellness strategies</li> <li>Action plan(s) are complete, clear, logical, and well planned to support successful implementation</li> </ul>	
Action steps are appropriate to accomplish SMART Objectives and are planned to occur throughout the grant year	<ul style="list-style-type: none"> <li>Few action steps are appropriate to accomplish SMART objectives and need development to effectively achieve SMART objectives</li> </ul>	<ul style="list-style-type: none"> <li>Most action steps are appropriate to accomplish SMART objectives and are planned to occur throughout most of the grant year</li> </ul>	<ul style="list-style-type: none"> <li>All action steps are appropriate to accomplish SMART objectives and are planned to occur throughout entire grant year.</li> </ul>	
Evidence of success measures are linked to accomplishing implementation of action steps	<ul style="list-style-type: none"> <li>Evidence of success measures are not identified</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>Evidence of Success measures are identified but not measurable and lack detail to clearly gauge progress towards successful implementation of action steps</li> </ul>	<ul style="list-style-type: none"> <li>Evidence of success measures are identified and measurable, but lack detail to clearly gauge progress towards implementation of action steps</li> </ul>	<ul style="list-style-type: none"> <li>Evidence of success measures identified, measurable, and clearly gauge progress towards successful implementation of action steps</li> </ul>	
Reviewer Comments: Strengths, Weaknesses, Required Changes				Total Score

SEW Project Coordinator				
Criteria	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
<b>SEW Project Coordinator</b> <ul style="list-style-type: none"> <li>SEW Project Coordinator in place with clear description of role and responsibilities</li> <li>Oversees a coordinated, multi-component and comprehensive approach to SEW</li> <li>Gives dedicated time and authority to manage and implement SEW program</li> <li>Works with leadership to ensure the success and sustainability of the SEW program</li> <li>Convenes and supports the wellness team</li> <li>Demonstrated leadership and experience in coordinating wellness initiatives and grant administration</li> </ul>	<ul style="list-style-type: none"> <li>No SEW Project Coordinator identified</li> </ul>	<ul style="list-style-type: none"> <li>SEW Project Coordinator identified with limited information describing role and responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>SEW Project Coordinator in place with clear description of role and responsibilities</li> </ul>	
<b>District Support Described to Support SEW Project Coordinator</b> <ul style="list-style-type: none"> <li>Stipend or compensation</li> <li>Space</li> <li>Dedicated time and authority to accomplish SEW program responsibilities</li> <li>Resources</li> <li>Time to work with leadership to ensure success and sustainability of the SEW program</li> <li>Actively support the formation and convening of an employee wellness team by offering release time</li> </ul>	<ul style="list-style-type: none"> <li>No District support described</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>Very little District support provided</li> </ul>	<ul style="list-style-type: none"> <li>Limited District support provided</li> </ul>	<ul style="list-style-type: none"> <li>Clearly identified District support provided to ensure fulfillment of grant responsibilities and leadership to successfully implement SEW program</li> </ul>	
<b>Reviewer Comments: Strengths, Weaknesses, Required Changes</b>				<b>Total Score</b>



Measure of Success				
Criteria	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
Measures of Success are identified to gauge progress toward achieving all SMART objectives and long term SEW goals	<ul style="list-style-type: none"> <li>No measures of success were identified</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>Measures of success are identified but lack clarity and are not measurable</li> </ul>	<ul style="list-style-type: none"> <li>Clearly describes a few measures of success for SMART objectives and long term SEW goals</li> </ul>	<ul style="list-style-type: none"> <li>Clearly describes multiple measures of success for SMART objectives and long term SEW goals to evaluate program effectiveness and improved staff well being</li> </ul>	
Plan to collect data is described and helps gauge progress towards achieving SMART Objectives and long term SEW Goals	<ul style="list-style-type: none"> <li>No plan for collecting data to gauge progress towards achieving SMART objectives or long term SEW goals is provided</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>Unclear plan for collecting data and needs further thought and planning to demonstrate program effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>Formal plan for collecting data is described, but lacks detail and is limited in scope. Needs further development</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>Formal plan for collecting data is described with a focus on staff needs, interests, staff participation, and staff satisfaction with the program only</li> </ul>	<ul style="list-style-type: none"> <li>Formal plan to systematically collect data is described to capture employee participation and satisfaction with program</li> </ul> <b>AND</b> <ul style="list-style-type: none"> <li>Progress toward SMART objectives and results such as changes in health behaviors, health risks, employee morale and absenteeism is described</li> </ul>	
Reviewer Comments: Strengths, Weaknesses, Required Changes				Total Score

Sustainability Plans for School Employee Wellness				
Criteria	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
District's capacity to implement policies, practices and programs to sustain SEW initiatives <ul style="list-style-type: none"> <li>Gain leadership and Board support</li> <li>Select a Wellness Coordinator and a Wellness Team</li> <li>Gather the Data-use it</li> <li>Put priorities into Action</li> <li>Create a Supportive and Healthy Environment</li> <li>Evaluate and Celebrate</li> </ul>	<ul style="list-style-type: none"> <li>The capacity of the District to implement SEW policies, practice, and programs is not described</li> </ul> <b>OR</b> <ul style="list-style-type: none"> <li>The capacity of the District to implement SEW policies, practice, and programs is not clearly described or relevant to employee wellness</li> </ul>	<ul style="list-style-type: none"> <li>The capacity of the District to implement SEW policies, practices, and programs is described but has gaps as it relates to SEW and OEA Choice Trust's Blueprint for SEW</li> </ul>	<ul style="list-style-type: none"> <li>The District clearly describes the capacity to implement SEW policies, practices and programs and is aligned with OEA Choice Trust's Blueprint for SEW</li> </ul>	
Reviewer Comments: Strengths, Weaknesses, Required Changes				Total Score

Project Budget				
Criteria	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
Budget worksheet	• Budget worksheet is incomplete and inaccurate	• Budget worksheet is complete but lacks clarity	• Budget worksheet is clear, complete and accurate	
Budget narrative <ul style="list-style-type: none"> <li>Grant applications requesting funding for equipment purchases over \$500 in value must include two competitive pricing bids</li> <li>Grant funds cannot be used for the following reasons:               <ul style="list-style-type: none"> <li>For political or religious purpose</li> <li>Items already purchased</li> <li>Deficit funding</li> <li>Staff room renovations or equipment</li> </ul> </li> </ul>	• Budget narrative is not included <b>OR</b> • Budget narrative is weak and lacks detail	• Budget narrative explains how funds will be spent but lacks clarity and detail	• Budget narrative is detailed and explains how funds will be spent in all budget categories	
Aligned with goals, action plan and action steps	• Budget and budget narrative do not align with program goals and action plan/steps	• Budget and budget narrative are mostly aligned with program goals and action plan/steps	• Budget and budget narrative are fully aligned with the program goals and action plan/steps	
50% local contribution and in-kind donation <ul style="list-style-type: none"> <li>There is a required 50% match for OEA Choice Trust Grants. These funds can be in-kind donations or local contributions. In-kind donations can be donated goods, services, equipment, non-cash items, donated space, or volunteer hours from your organization or community partnerships. Local contributions are financial contributions provided by your Organization or Community Partnerships.</li> </ul> <p><b>Note:</b> please score either a 0 or 3 for this criteria</p>	• 50% local contribution and in kind donation is not met		• 50% local contribution and in-kind donation is fully met	
Reviewer Comments: Strengths, Weaknesses, Required Changes				Total Score

