

**OEA Choice Trust Grant Review
Scoring Rubric**

Applicant:

Funding Period: July 2020 – June 2021

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 will 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 an 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 full 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 having 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
1. Grant Application Cover Sheet	Required	<input type="checkbox"/> Section completed <input type="checkbox"/> All signatures required and secured
2. Program Title and Summary	6	
3. School/District & Community Description	9	
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. Required: Letters of Support	3	<input type="checkbox"/> Letters included <input type="checkbox"/> Quality of letters and support

Total Score for Applicant:

Overall Appraisal and Comments: *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 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
All school employee sectors will be served & have access to wellness program	<ul style="list-style-type: none"> Only one school employee sector or group is identified and has access to wellness program 	<ul style="list-style-type: none"> Licensed and Education Support Professional employees are identified and have access to wellness program 	<ul style="list-style-type: none"> All school employee sectors are served and have access to wellness program to include, district office, licensed staff, education support professionals, administrators, nutrition service staff, custodial, facilities and transportation staff (as applicable) <p>OR</p> <ul style="list-style-type: none"> 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>) 	
Description of why SEW program matters to their school community	<ul style="list-style-type: none"> No description is provided <p>OR</p> <ul style="list-style-type: none"> Marginal description is provided 	<ul style="list-style-type: none"> Satisfactory description is provided 	<ul style="list-style-type: none"> Very strong description is provided 	
Reviewer Comments: Strengths, Weaknesses, Recommended 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"> • Mission & vision • Student population • Key facts that describe district • Number of schools • Geographic information & community description 	<ul style="list-style-type: none"> • No information OR <ul style="list-style-type: none"> • very little information is provided to describe district and community, or staff demographics 	<ul style="list-style-type: none"> • Moderate information is provided to describe district, community or staff demographics 	<ul style="list-style-type: none"> • Ample, detailed information is provided to describe district, community or staff demographics 	
Description of Staff Population and Demographics <ul style="list-style-type: none"> • percent licensed, classified and confidential staff or full time faculty, adjunct faculty and full time and part time staff • the percent of staff living in the community compared to percent of staff who commute from outside the community • length of employment at the district • race and ethnicity • gender • age ranges 	<ul style="list-style-type: none"> • No information OR <ul style="list-style-type: none"> • very little information is provided to describe staff demographics 	<ul style="list-style-type: none"> • Moderate information is provided to describe staff demographics 	<ul style="list-style-type: none"> • Ample, detailed information is provided to describe staff demographics 	
Past SEW efforts and programs The purpose of this section is to understand any past efforts taken to promote staff health and well-being and lessons learned to strengthen grant applicant's proposal OEA Choice Trust funds grants to support the planning, implementation and sustainability of school employee wellness programs from start up to building a comprehensive program for all school employees.	<ul style="list-style-type: none"> • No information is provided about past efforts taken to promote staff health and well-being 	<ul style="list-style-type: none"> • Moderate information is provided about past efforts taken to promote staff health and well-being OR <ul style="list-style-type: none"> • Moderate information provided about student wellness efforts that demonstrate a commitment to wellness 	<ul style="list-style-type: none"> • Complete information is provided about past efforts taken to promote staff health and well-being. 	
Reviewer Comments: Strengths, Weaknesses, Recommended Changes				Total Score

Employee Health and Well-being 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	
<p>Key health and well-being needs identified</p> <ul style="list-style-type: none"> • Improve physical health • Manage chronic conditions: blood pressure, cholesterol, diabetes and depression • Stress management • Foster resilience • Enhance social well-being • Foster emotional well-being and mental health • Promote financial well-being 	<ul style="list-style-type: none"> • Key health & well-being needs, issues, risk factors or interests were not identified • Health and well-being needs were identified but do not align with OEA CT priority areas 	<ul style="list-style-type: none"> • Key health and well-being needs, issues, risk factors or interests were identified but lacked clarity 	<ul style="list-style-type: none"> • Clear, relevant health and well-being needs, issues, risk factors and interests were identified 	
<p>Relevant data to support the need for employee health and well-being and identified health issues, risk factors, and interests</p> <p><i>Potential data sources:</i></p> <ul style="list-style-type: none"> • Staff health and well-being interest and needs survey • Human Resource data and information • County health rankings • County public health data • Other relevant data sources can be used to support the need for SEW, such as staff and organizational climate surveys or listening sessions • Oregon TELL Survey results 	<ul style="list-style-type: none"> • Very little or no data is used to support identified health and well-being needs 	<ul style="list-style-type: none"> • Limited data is provided to support health and well-being needs 	<ul style="list-style-type: none"> • Data provided is clear, concise, and supports identified health and well-being needs 	
Reviewer Comments: Strengths, Weaknesses, Recommended 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"> Describes the results the school employee wellness program is aiming to achieve over the 5-year grant period. 	<ul style="list-style-type: none"> Proposal fails to include clear school employee health and well-being goal(s) <p>OR</p> <ul style="list-style-type: none"> Proposal includes school employee health and well-being goal(s), but goal(s) are vague and confusing 	<ul style="list-style-type: none"> Proposal includes school employee wellness goal(s) but unclear how it ties to identified employee health and well-being needs 	<ul style="list-style-type: none"> Proposal includes clear school employee wellness goal(s) that are aligned with identified employee health and well-being needs 	
<p>Active leadership support</p> <ul style="list-style-type: none"> Employee health and well-being is integrated into education vision and goals as a key function of school improvement and student success Employee wellness program is aligned with employee morale, recruitment and retention strategies Dedicates necessary resources to a coordinated approach to School Employee Wellness (SEW), such as staff, time, funds, and leveraging community partners Officially selects one staff person with dedicated time and authority to oversee a coordinated approach to SEW program. Superintendents, school board members, principals, union leaders regularly communicate the importance of wellness to all staff, students and community members Leadership actively participates in district SEW program 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. District and union leadership collaboration in planning, communicating and supporting the SEW program. 	<ul style="list-style-type: none"> Minimal or no description of the leadership support is provided 	<ul style="list-style-type: none"> A description of leadership involvement and support for SEW is provided, but it lacks either details or depth in how support is given 	<ul style="list-style-type: none"> A clear and thorough description of leadership involvement and support for SEW is provided Active multi-level leadership support and collaboration throughout the organization (district, school, union, ESD, school board, community college senior and department leaders) 	
<p>School employee involvement in planning and implementing SEW program</p> <ul style="list-style-type: none"> Staff health and well-being needs & interest survey has been administered and results used to identify priority interests and needs A wellness committee exists with diverse representation from all employee sectors to inform planning and implementation 	<ul style="list-style-type: none"> No information was provided that describes how school employees were involved <p>OR</p> <ul style="list-style-type: none"> Very little information is provided to support that school employees were involved 	<ul style="list-style-type: none"> Evidence is provided to support that school employees were involved such as administration of staff health and well-being need and interest survey or existing wellness committee with staff representation from 	<ul style="list-style-type: none"> There is clear and convincing information provided to support that school employees are significantly involved with multiple opportunities to provide input 	

<ul style="list-style-type: none"> • Clear description of how the employee wellness committee will serve in an advisory role to this grant and SEW program • Staff health and well-being needs and interests are considered when designing SEW program so that the program is staff driven and supported by leadership 		<p>most employee sectors</p> <p>OR</p> <ul style="list-style-type: none"> • Plans in place to form an employee wellness committee with representation from & district & school buildings to inform planning and implementation • Plans in place to survey staff about their health and well-being needs and interests 		
<p>SEW communication plans and strategies to promote program are designed to reach ALL employees; district office, licensed staff, education support professionals, classified, administrators, nutrition service staff, custodial, facilities, and transportation staff, and part time and full time faculty and staff,</p> <p>Effectiveness Hierarchy</p> <ul style="list-style-type: none"> • Face to Face strategies; champions • Brands and logos are created to market SEW • Announcements during staff meetings • Written-individual notices • Stall talk notices • Newsletters • Websites • Email messages • Social media • Bulletin boards • Payroll inserts 	<ul style="list-style-type: none"> • Communication strategies lack detail and are primarily focused on efficiency such as email and website strategies <u>or</u> solely focused on teachers <p>AND</p> <ul style="list-style-type: none"> • Very limited plans in place to communicate successes and lessons learned to key stakeholders 	<ul style="list-style-type: none"> • Program plans include a specific SMART objective and action plan to develop an effective communication plan to reach <u>all</u> school employees <p>OR</p> <ul style="list-style-type: none"> • Communication strategies move beyond emails by increasing use of proven effective promotional strategies <p>AND</p> <ul style="list-style-type: none"> • Plans in place to communicate successes and lessons learned to key stakeholders but lacks detail 	<ul style="list-style-type: none"> • Strong and creative communication plan with a variety of strategies to effectively reach ALL employees <p>AND</p> <ul style="list-style-type: none"> • Plans in place to communicate successes and lessons learned to specific stakeholder groups such as school employees, administration, school board and community members 	
<p>Community partnerships</p>	<ul style="list-style-type: none"> • Few potential partners are identified or unclear how identified partners will support SEW program 	<ul style="list-style-type: none"> • Potential partners are clearly identified and clear explanation of how support will be provided <p>OR</p> <ul style="list-style-type: none"> • In process of developing external and internal partnerships to leverage resources for SEW 	<ul style="list-style-type: none"> • Community partnerships in place to support SEW program • Clear detailed description of how community partners will continue to provide support and resources for SEW 	
<p>Reviewer Comments: Strengths, Weaknesses, Recommended Changes</p>				<p>Total Score</p>

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"> SMART objectives are not linked to long term SEW goals and need development 	<ul style="list-style-type: none"> Most of the SMART objectives are linked to long term SEW goals 	<ul style="list-style-type: none"> All SMART objectives are clearly linked to long term SEW goals 	
SMART Objectives are specific, measurable, action-oriented, relevant, and time-phased	<ul style="list-style-type: none"> SMART objectives are not specific, measurable, action-oriented, relevant or time phased and need development 	<ul style="list-style-type: none"> Most SMART objectives are specific, measurable, action-oriented, relevant, and time phased SMART objectives may have some weaknesses to address 	<ul style="list-style-type: none"> All SMART objectives are specific, measurable, action-oriented, relevant and time phased 	
Action plans are well planned to serve as a roadmap for successful implementation of SEW program and to achieve SMART Objectives	<ul style="list-style-type: none"> Action plan(s) do not align with stated SMART objective(s) Action plans are incomplete and lack detail to support successful implementation 	<ul style="list-style-type: none"> Action plan(s) align with most stated SMART objective(s) Action plan(s) are mostly complete but lack some detail or clarity to support successful implementation 	<ul style="list-style-type: none"> Action plan(s) clearly align with all stated SMART objective(s) Action plan(s) are complete, clear, logical, and well planned to support successful implementation 	
Evidence informed strategies and best practices are used to effectively support employee health and well-being and create a culture of wellness. <ul style="list-style-type: none"> Fostering School Employee Health, Well-being and Resilience: Framework of Proven Strategies and Best Practices Blueprint for School Employee Wellness 	<ul style="list-style-type: none"> Action plan(s) reflect a lack of understanding of effective school employee wellness strategies Few action steps are appropriate to accomplish SMART objectives and need development to effectively achieve SMART objectives 	<ul style="list-style-type: none"> Action plan(s) reflect a modest understanding of effective school employee health & well-being strategies Most action steps are appropriate to accomplish SMART objectives and are planned to occur throughout most of the grant year 	<ul style="list-style-type: none"> Action plan(s) reflect a clear understanding of effective school employee health and well-being strategies All action steps are appropriate to accomplish SMART objectives and are planned to occur throughout entire grant year. 	
Evidence of success measures demonstrate implementation of action steps to achieve SMART Objectives.	<ul style="list-style-type: none"> Evidence of success measures are not identified OR <ul style="list-style-type: none"> Evidence of success measures are identified but not measurable and lack detail to demonstrate successful implementation of action steps 	<ul style="list-style-type: none"> Evidence of success measures are identified and measurable, but lack detail to demonstrate successful implementation of action steps 	<ul style="list-style-type: none"> Evidence of success measures are identified, measurable, and clearly demonstrate successful implementation of action steps 	
Reviewer Comments: Strengths, Weaknesses, Recommended 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	
SEW Project Coordinator <ul style="list-style-type: none"> SEW project coordinator in place with clear description of role and responsibilities Oversees a coordinated, multi-component and comprehensive approach to SEW Gives dedicated time and authority to manage and implement SEW program Works with leadership to ensure the success and sustainability of the SEW program Convenes and supports the wellness team Demonstrated leadership and experience in coordinating wellness initiatives and grant administration 	<ul style="list-style-type: none"> No SEW project coordinator identified SEW project coordinator identified with minimal information describing role and responsibilities 	<ul style="list-style-type: none"> SEW project coordinator identified with moderate information describing roles and responsibilities OR <ul style="list-style-type: none"> Plans are in place to recruit and hire a SEW project coordinator that includes a description of the roles and responsibilities Identified financial staff member who will provide support for grant budget development and review and provided contact information 	<ul style="list-style-type: none"> SEW project coordinator in place with a thorough description of role and responsibilities Identified financial staff member who will provide support for grant budget development and review and provided contact information 	
District Support Described to Support SEW Project Coordinator <ul style="list-style-type: none"> Stipend or compensation Space Dedicated time and authority to accomplish SEW program responsibilities Resources Time to work with leadership to ensure success and sustainability of the SEW program Actively support the formation and convening of an employee wellness team by offering release time 	<ul style="list-style-type: none"> No district support is described OR <ul style="list-style-type: none"> Very limited district support is provided 	<ul style="list-style-type: none"> Moderate district support is provided to support the SEW Project Coordinator 	<ul style="list-style-type: none"> Clearly identified district support provided to ensure fulfillment of grant responsibilities and leadership to successfully implement SEW program 	
Reviewer Comments: Strengths, Weaknesses, Recommended Changes				Total Score

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"> No measures of success were identified OR <ul style="list-style-type: none"> Measures of success are identified but lack clarity and are not measurable 	<ul style="list-style-type: none"> Clearly describes a few measures of success for SMART objectives and long term SEW goals 	<ul style="list-style-type: none"> Clearly describes multiple measures of success for SMART objectives and long term SEW goals to evaluate program effectiveness and improved staff health and well being 	
Data collection plan is in place and describes how data will be used to gauge progress toward achieving SMART Objectives and determine program effectiveness	<ul style="list-style-type: none"> No plan for collecting data to gauge progress towards achieving SMART objectives or determine program effectiveness OR <ul style="list-style-type: none"> Unclear plan for collecting data is described and needs further planning and development 	<ul style="list-style-type: none"> Informal plan for collecting data is described but lacks detail and is limited in scope. Needs further development OR <ul style="list-style-type: none"> Formal plan for collecting data is described with a limited focus on staff needs, interests, staff participation, and staff satisfaction with the program 	<ul style="list-style-type: none"> Formal plan to systematically collect data is described to capture employee participation and satisfaction with program AND <ul style="list-style-type: none"> Progress toward SMART objectives and results are described, such as changes in employee health and well-being, workplace environment, practices and culture and employee retention, job satisfaction, and morale. 	
Reviewer Comments: Strengths, Weaknesses, Recommended 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"> • Gain leadership and board support • Select a Wellness Coordinator and a Wellness Team • Gather the data and use it • Put priorities into action • Create a supportive and healthy Environment • Evaluate and celebrate 	<ul style="list-style-type: none"> • The capacity of the district to implement SEW policies, practice, and programs is not described OR <ul style="list-style-type: none"> • The capacity of the district to implement SEW policies, practice, and programs is not clearly described or relevant to employee wellness 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • The district clearly describes the capacity to implement SEW policies, practices and programs and is aligned with OEA Choice Trust's Blueprint for SEW 	
Reviewer Comments: Strengths, Weaknesses, Recommended Changes				Total Score

Program Grant Budget				
Criteria	Points Awarded			Score
	Inadequate: requires additional information 0-1	Adequate: clear and complete 2	Excellent: concise and thoroughly developed 3	
Budget worksheet	<ul style="list-style-type: none"> Budget worksheet is incomplete and inaccurate 	<ul style="list-style-type: none"> Budget worksheet is complete but lacks clarity and contains a few inaccuracies 	<ul style="list-style-type: none"> Budget worksheet is clear, complete and accurate 	
Budget narrative <ul style="list-style-type: none"> Grant applications requesting funding for equipment purchases over \$500 in value must include two competitive pricing bids Grant funds cannot be used for the following reasons: <ul style="list-style-type: none"> For political or religious purpose Items purchased prior to grant award Deficit funding Ergonomic equipment Infrastructure costs such as plumbing or electrical to renovate staff rooms or create wellness centers General furniture for staff room renovations 	<ul style="list-style-type: none"> Budget narrative is not included OR <ul style="list-style-type: none"> Budget narrative is weak, lacks detail and is inaccurate 	<ul style="list-style-type: none"> Budget narrative explains how funds will be spent but lacks enough detail to understand how budget calculations were determined Budget narrative contains a few inaccuracies and as a result calculations do not match grant fund requests or in-kind donations or local contributions 	<ul style="list-style-type: none"> Budget narrative is detailed and explains how funds will be spent in all budget categories Budget narrative is accurate and matches total grant funds requested in each budget category 	
Aligned with goals, action plan and action steps	<ul style="list-style-type: none"> Budget and budget narrative do not align with program goals and action plan/steps 	<ul style="list-style-type: none"> Budget and budget narrative are mostly aligned with program goals and action plan/steps 	<ul style="list-style-type: none"> 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"> 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. <p>Note: please score either a 0 or 3 for this criterion</p>	<ul style="list-style-type: none"> 50% local contribution and in-kind donation is not met 		<ul style="list-style-type: none"> 50% local contribution and in-kind donation is fully met 	
Reviewer Comments: Strengths, Weaknesses, Recommended Changes				Total Score