

Scoring Rubric for Strategic Planning Consultant Proposals

Total Possible Points: 100

A. Relevant Experience & Qualifications — 20 points

What we're looking for:

- Demonstrated experience leading strategic planning for nonprofits, associations, or health care organizations
- Experience working with Boards, executive teams, and multi-stakeholder environments
- Familiarity with community health centers, health equity, or value-based care (preferred)

Scoring Guidance:

- **18–20:** Extensive, highly relevant experience; strong portfolio of similar projects
 - **14–17:** Solid experience; some directly comparable projects
 - **10–13:** Moderate experience; limited relevance to OPCA's context
 - **0–9:** Minimal or no relevant experience
-

B. Approach & Methodology — 25 points

What we're looking for:

- Clear, thoughtful, equity-centered methodology
- Strong engagement plan for Board, Network, members, and staff
- Effective use of surveys, focus groups, interviews, and meeting attendance
- Clear plan for synthesizing stakeholder input into strategic priorities

Scoring Guidance:

- **22–25:** Highly detailed, innovative, inclusive methodology; excellent alignment with OPCA's needs
 - **18–21:** Strong methodology with minor gaps
 - **12–17:** Adequate but generic approach
 - **0–11:** Unclear, incomplete, or poorly aligned methodology
-

C. OPCA–Network Alignment Strategy — 15 points

What we're looking for:

- Understanding of multi-entity alignment
- Ability to facilitate shared direction, roles, and priorities
- Experience integrating subsidiary or partner organizations into strategic planning

Scoring Guidance:

- **13–15:** Strong, explicit strategy for OPCA–Network alignment
 - **10–12:** Some alignment considerations included
 - **6–9:** Minimal alignment strategy
 - **0–5:** No alignment strategy
-

D. KPI, Dashboard, and Implementation Framework — 15 points**What we're looking for:**

- Ability to translate strategy into goals, objectives, KPIs
- Experience designing dashboards, scorecards, or visualization tools
- Clear plan for supporting OPCA's performance monitoring needs

Scoring Guidance:

- **13–15:** Robust, practical, and well-designed implementation framework
 - **10–12:** Solid framework with minor gaps
 - **6–9:** Basic or conceptual framework
 - **0–5:** No meaningful implementation approach
-

E. Facilitation Skills & Retreat Design — 10 points**What we're looking for:**

- Experience facilitating Board retreats, especially with new or transitioning Boards
- Ability to design engaging, productive sessions
- Strong communication and group facilitation skills

Scoring Guidance:

- **9–10:** Exceptional facilitation experience; strong retreat design
- **7–8:** Good facilitation experience
- **4–6:** Limited facilitation experience
- **0–3:** No relevant facilitation experience

F. Inclusive Process Design — 10 points

What we're looking for:

- A structured approach to gathering input from a broad cross-section of OPCA's Board, Network, members, and staff
- Demonstrated ability to gather and incorporate diverse viewpoints into analysis and final recommendations
- Engagement methods that foster trust, transparency, meaningful participation, and is responsive to different stakeholder needs

Scoring Guidance:

- 9–10: Comprehensive, well-integrated inclusive process
- 7–8: Solid approach with some inclusive elements
- 4–6: Limited or unclear approach
- 0–3: No inclusive process described

G. Budget & Value — 5 points

What we're looking for:

- Alignment with OPCA's budget
- Clear, reasonable cost structure
- Good value for scope and deliverables

Scoring Guidance:

- **5:** Excellent value; clear alignment with budget
- **3–4:** Reasonable value
- **1–2:** Questionable value or unclear pricing
- **0:** Exceeds budget or lacks required detail