

Social Return on Investment RFP Scoring Rubric

Evaluation Criteria and Corresponding Questions	Not addressed	Incomplete, unclear, and/or marginal alignment	Adequate quality, partial alignment	Outstanding quality, clear alignment	Total Points available (10)
Methodology and Deliverables Describe your proposed approach and strategies for implementing the Scope of Work. Is there anything missing from our scope of work and deliverables that you think would be an important component of this project? Describe how you will identify and engage the primary stakeholders (United Way staff, donor representatives, funded programs). Describe any barriers that you anticipate and how they may be addressed. Describe your approach to building United Way staff's capacity to calculate, use, and disseminate SROI information. What would you need from United Way to do this effectively? Project Workplan Project Budget	(0 points) Responses are missing or do not correlate with questions	(1 – 2 points) Parts of response are missing or unclear. Vague or hypothetical description of approach, strategies, workplan, and/or budget and how they align with Scope of Work and deliverables.	(3 – 4 points) Approach appears to align with Scope of Work and required deliverables. Clear and detailed plan for providing the deliverables, and includes information about incorporating stakeholder input, capacity building, and addressing potential barriers. Workplan and budget are reasonable and clear.	(5 points) Proposed approach clearly aligns with the Scope of Work and required deliverables. Excellent, clear, detailed plan for providing the deliverables that incorporates stakeholder input and capacity building. Realistic assessment of potential barriers and clear plan for addressing them. Workplan and budget are reasonable, clear, and detailed and completely aligned with Scope of Work.	5 (50% of total)

Evaluation Criteria and Corresponding Questions	Not addressed	Incomplete, unclear, and/or marginal alignment	Adequate quality, partial alignment	Outstanding quality, clear alignment	Total Points available (10)
Experience and Qualifications Describe your qualifications to implement the scope of work. Include past and current experience with SROI calculation. Provide information on the staff who will be working on this project, their roles, and their experience with a project of this type. (Resumes/CV's for the project lead and any other staff working on the project should be attached) Do you intend to subcontract any of this work? If so, explain what work would be subcontracted and your plan for oversight of any proposed sub-contractors or consultants. Resumes/CVs	(0 points) Responses are missing or do not correlate with questions	(1 – 2 points) Parts of response are missing or unclear. Documentation of staff experience is not included. No directly related experience with SROI calculation and/or vague description of experience.	(3 - 4 points) Experience is described in a clear and detailed manner. Documentation that staff who will be doing the work have experience calculating similar SROI metrics. Clear plan for oversight for any subcontractors.	(5 points) Experience is described in a clear and detailed manner. Documentation that staff who will be doing the work have extensive experience calculating similar SROI metrics for multiple projects as well as providing capacity-building. Clear plan for oversight for any subcontractors and experience supervising subcontractors.	5 (50% of total)