TOOL F
Narrative Content Guide - EXAMPLE
Merit Rating Factors, Criteria and Scoring

NARRATIVE CONTENT GUIDE - SAMPLE
Merit Rating Factors
NOFO #

Scoring criteria summary	Total available points: 200
Project narrative	**185 points**
1. Priority populations: Who is being served?	**15 points**
2. Proposed activities: What will this project do?	**50 points**
3. Project goals: What does this project expect to achieve?	**20 points**
4. Capabilities: Community Relationships, Qualifications, and Staffing Plans	**35 points**
5. Work plan and timeline	**30 points**
6. Conflict of interest (COI) attestation	**10 points**
7. Ensuring privacy and security of consumer personally identifiable information (PII)	**25 points**
Budget narrative	**15 points**

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PROJECT NARRATIVE	Max 185 points
SECTION 1 **Priority populations: Who is being served?**	**Maximum points: 15**
Clearly defines the priority populations and the targeted service areas (that is, FFE states and counties) for the project.	**5 points**
Describes the SDOH and HRSNs that contribute to health disparities and disproportionate access to healthcare coverage for members the priority populations.	**5 points**
Explains why you chose the selected priority populations, including references to data used to assess the needs of the priority populations and targeted service areas.	**5 points**
SECTION 2 **Proposed activities: What will this project do?**	**Maximum points: 50**

Provide targeted assistance
- Clearly explains your strategy for providing targeted assistance to your chosen priority populations within the proposed FFE states.
- Explains how you will prepare to assist any consumer seeking assistance.
 	
Your strategy does the following:
  • Addresses SDOH and HRSNs identified within the priority populations.
  • Explains the activities you will use to carry out this strategy and why you chose them.
  • Describes how the identified outreach and communication methods are culturally competent and linguistically appropriate for the priority populations.
	10 points

Conduct education and outreach Describes your plans for:	**15 points total**
- Conducting education and outreach activities within the targeted service areas.	**4 points**
- Identifying settings and venues to host education and outreach activities. Explains why these locations are appropriate for reaching the chosen priority populations.	**4 points**
- Using community relationships and partnerships to carry out these activities.	**4 points**
- Providing information in a manner that is culturally and linguistically appropriate to the needs of the populations being served, including ensuring the accessibility and usability of Navigator tools and functions for individuals with disabilities.	**3 points**
Facilitate selection of a QHP Clearly describes your ability to:	**10 points total**
- Provide information that is fair, accurate, and impartial when assisting consumers with submitting the eligibility application.	**3 points**
- Clarify the distinctions among health coverage options, including QHPs.	**2 points**
- Help consumers make informed decisions during the health coverage selection process.	**3 points**
- Leverage CMS systems and coordinate with other FFE assister organizations operating in your service area to facilitate seamless coverage transitions for consumers as they transition between Medicaid/CHIP and QHP coverage.	**2 points**

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Provide post-enrollment information and assistance Describes how you plan to:	15 points total
- Help consumers understand their health coverage and how to use it, including accessing care and preventive services.	**5 points**
- Educate consumers about their rights with respect to essential health benefits available through the Exchange (Marketplace) plans.	**5 points**
- Connect consumers with consumer assistance programs, appeals programs, and ombudsmen to help with grievances, questions, or complaints, such as those related to unauthorized enrollment or switching of health plans.	**5 points**

SECTION 3 Project goals: What does this project expect to achieve?	Maximum points: 20
- Establishes realistic and attainable project goals for the first 12-month budget period (August 27, 2024 to August 26, 2025).	**5 points**
- Project goals and target numbers are outlined in a table.	**10 points**
- Project goals take into consideration: The size of the proposed FFE service areas you will operate in.	**5 points**
- The size of the priority populations you will serve.	
- The amount of funding you are requesting for the first 12-month budget period.	

SECTION 4 Capabilities: Community relationships, qualifications, and staffing plans	Maximum points: 35
- Clearly describes your capabilities to carry out the proposed activities, reach your priority population, and achieve your project goals.	**10 points**
- Describes current or prior experiences working with the priority populations. Provides at least one example of how you have successfully included community members and/or local organizations in a previous project.	**5 points**
- Demonstrates a relationship to the priority populations and the communities you plan to serve. Provides at least two examples that show a trusted relationship with the priority populations and their communities.	**5 points**
- Identifies organizations you will partner with to successfully carry out your project plan.	**3 points**
- Organizational partnerships are appropriate for the priority populations and targeted service	
- areas and demonstrate the experience relevant to carry out the proposed activities.	
- Demonstrates the organizational and staffing capacity and qualifications needed to implement the proposed activities and achieve the expected project goals.	**5 points**
- Recruitment and hiring schedule, along with resumes and job descriptions, are provided for key personnel in the attachments.	
- Demonstrates your ability to ensure all Navigator staff complete the required federal and state (if applicable) training and certification requirements by October 1, 2024. The Navigator training and certification plan documents a plan for ensuring operational readiness.	**2 points**
- Clearly outlines processes and tools the AOR and PD will use to oversee and monitor the proposed activities and completion of project goals.	**5 points**

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SECTION 5 **Work plan and timeline**	**Maximum points: 30**
- Clearly outlines how you will implement all components of the project and achieve the project goals. Key activities, associated timeframes, and responsible staff are all documented.	**10 points**
- Uses a chart, table, or graph to provide a realistic timeline, containing goals and objectives that are consistent with those outlined in the project plan for the first 12-month budget period of the project.	**10 points**
- The outcomes identified in the work plan seem feasible and will provide actionable information to demonstrate success.	**10 points**

SECTION 6 **Conflict of interest attestation**	**Maximum points: 10**
- Provides a written attestation that the organization, along with anyone who will perform work related to the organization's Navigator program activities, or who will perform Navigator services for the organization, does not have any of the prohibited relationships.	**5 points**
- Provides a written attestation that the organization, along with anyone who will perform work related to the organization's Navigator program activities or who will perform Navigator services for the organization, will remain free of all applicable COIs during their term as a Navigator awardee.	**5 points**

SECTION 7 **Ensuring privacy and security of consumer personally identifiable information (PII)** Demonstrates the ability to comply with all applicable privacy and security standards by **developing a PII plan** that outlines the following:	**Maximum points: 25**
- A process for ensuring compliance by all staff performing Navigator activities (as well as those who have access to sensitive information or PII related to your organization's Navigator activities) with FFE privacy and security standards, especially when using computers, laptops, tablets, smartphones, and other electronic devices.	- 5 points
- A schedule and process for assessing qualifications and monitoring the completion of all required training related to privacy and security standards and compliance by any staff performing Navigator activities (as well as those who have access to sensitive information or PII related to your organization's Navigator activities) to receive, secure, and handle PII or other sensitive information, including noting whether background checks will be conducted.	- 10 points
- A mitigation plan for addressing any PII breaches that may occur.	- 5 points
- A process for obtaining each consumer's authorization before gaining access to their PII.	- 2 points
- A process for providing ongoing monitoring throughout the duration of the project to ensure continued compliance with all privacy and security standards.	- 3 points

BUDGET NARRATIVE

Budget narrative	**Maximum points: 15**
- Clearly supports the proposed activities for the first 12-month budget period of the project and includes a high-level summary of budget costs for Years 2 through 5.	5 points

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- Costs appear reasonable relative to the project's purpose, goals, and strategy.   5 points
- Provides an explanation for how costs were calculated, along with a   5 points
  justification for the items in each budget category.

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