

2027 IDA Tax Credit Application Scoring Rubric

The following are the review criteria the review team will use to score each IDA Tax Credit application. Each grant will be rated based on the criteria listed and given a score out of one hundred.

	Exemplary - Exceeds Expectations	Meets Expectations	Insufficient Evidence
Project Need, Summary & Design: (30 Points)	A crucial community need is clearly defined and strongly supported with historical or statistical data. The targeted population is clearly identified, including estimated number of beneficiaries. Projected outcomes include credible data or benchmarks to support feasibility. The plan for incorporating and maintaining educational seminars is clear and achievable. (24-30 Points)	The community need is defined and supported with some statistical data. The targeted population is identified, including a general number of beneficiaries. Projected outcomes include credible data, but limited benchmarks to support feasibility. There is a reasonable plan for incorporating educational seminars but limited. (16-23 Points)	No community need clearly defined and limited or no statistical data. The targeted population is not clearly identified and lacks a number of beneficiaries. Projected outcomes include vague or limited data, missing benchmarks to support feasibility. Limited plan for incorporating educational seminars or minimal details on maintaining programs provided. (0-15 Points)
Project Planning, Goals & Timeline: (20 Points)	Program development plan and proposed timeline are detailed and realistic. Goals, activities and objectives to support the scope of work are clear and measurable. Performance targets are described and measurable, including match goals and sustainability through 2029. Administrative, fiscal, and oversight controls are clearly explained, including long-term sustainability post completion date, December 2027. (16-20 Points)	Program development plan and proposed timeline are provided, but limited detail. Goals, activities and objectives to support the scope of work are included, but not measurable. Lacking details on performance targets and match goals to support sustainability past 2027. (10-15 Points)	Program development plan and proposed timeline are provided, but some points missing or lacking in detail. Limited goals, activities and objectives to support the scope of work are included, but not measurable. Minimal information on performance targets and match goals for sustainability past 2027. (0-9 Points)

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Organization Capacity: (15 Points)	The organization clearly demonstrates sufficient experience to successfully implement this project, including innovative practices to support IDA. The organization has a strong track record of completing similar projects on time and within budget. Several letters of support are provided. (12-15 Points)	The organization demonstrates some experience to successfully implement this project. There is a minimal track record of completing similar projects on time and within budget. Some innovative suggestions that may potentially contribute to successful program. A few letters of support are provided. (7-11- Points)	The organization lacks experience to successfully implement this project. The project has limited innovation, relying on standard practices for successful program. No letters of support provided. (0-6 Points)
Fundraising Capacity: (10 Points)	The organization demonstrates strong fundraising experience and past success. There is a clear, realistic fundraising strategy to sell the requested amount of tax credits. (8-10 Points)	The organization describes minimal fundraising experience and past success. A practical fundraising strategy is provided and there is some evidence that the organization is prepared to sell the requested amount of tax credits. (5-7 Points)	The organization describes no fundraising experience or past success. A fundraising strategy is not provided, and there is no plan to sell the requested amount of tax credits. (0-4 Points)
Pledge Letters Submitted: (10 Points)	Multiple pledge letters included and demonstrated donor commitment, representing a substantial portion of the anticipated donation goal, greater than 80%. 100% receives 10 points, 90% receives 9 points, 80%= 8 points (8-10 Points)	Pledge letters included demonstrating some donor commitment, representing a portion of the anticipated donation goal, 50%-79%. 70% = 7; 60% = 6; 50%= 5 (5-7 Points)	Pledge letters included to demonstrate donor commitment, representing a small portion of the anticipated donation goal, less than 0% - 49%. 40%= 4; 30% = 3; 20% = 2; 10%=1 (0-4 points)
Budget Justification (5 points)	Budget narrative describes clear budget justification with all lines explained. Plan for matching participant funds and administration costs are clearly explained to fully implement the program. (4-5 Points)	Budget narrative and justification are provided that explain many of the line items, but limited description of plan for matching participant funds and administration costs. (2-3 Points)	Budget narrative provides limited budget justification, lacks in detail for providing matching participant funds and allocating administration costs. (0-1 Point)

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Overall Quality: (10 Points)	The application is well-organized, complete, with clear responses to all questions. All required documents, and letters are included. The budget and timelines are clear, complete, and consistent. (8-10 Points)	The application is complete, and well-organized, though details could be more specific. All required documents and letters are included. (5-7 Points)	The application would benefit from more details and descriptions overall. Some required documents, attachments or letters are missing. (0-4 Points)
Total: 100 Points			