

## Dane County CDBG/HOME 2027 Application Evaluation Criteria

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The CDBG Commission Application Review Team (ART) reviews and evaluates applications that are submitted through a Request for Proposal (RFP) process, and makes preliminary funding recommendations to the full CDBG Commission.

Applications will be evaluated using criteria set forth by the CDBG/HOME staff and members of the ART. Only eligible applications will be scored. Eligibility Requirements include, but may not be limited to:

1. Proposed project must be an eligible activity, and fall within an identified project or priority area established by the CDBG Commission;
2. Project must be located in, or provide services to, residents of one of the member communities of the Dane County Urban County Consortium;
3. Applicant cannot be a HUD-listed debarred or ineligible contractor;
4. If CDBG eligible, meet one of the three national objectives;
5. Project must be implementation- or shovel- ready by Quarter 1 of the grant year; or in specific cases, by Quarter 2.
6. An applicant with more than \$1,000.00 in unexpended funds in a single project area, from contracts executed before 2025, as of July 1, 2026, is not eligible to apply for additional funds in that project area.
7. An applicant with more than \$250,000.00 in unexpended funds in a single project area, as of July 1, 2026, is not eligible to apply for additional funds in that project area.

The Application Review Team will evaluate the applications using the following criteria:

| Application Evaluation Criteria  |                |
|----------------------------------|----------------|
| Item                             | Maximum Points |
| 1. Need and Priorities           | 20             |
| 2. Project Approach              | 35             |
| 3. Experience and Qualifications | 15             |
| 4. Financial Information         | 20             |
| 5. Past Performance              | 10             |
| TOTAL POINTS                     | 100            |

For 2027, RFP criteria for each application are delineated and tailored to the nature of the CDBG/HOME category. The definition and location of the items that are part of the review criteria will vary from one RFP/application template to the next but each follows the same order.

### **National Objective & Project Eligibility (not scored):**

This section in the RFP is not scored, but will be reviewed to determine agency or project eligibility to receive CDBG/HOME grant funds.

**Need and Priorities – (20 points)**

- **Needs and Priorities:** Community needs are described and identified, as they relate to the specific project. Applicant describes:
  - Meeting the National Objective of Benefitting Low- to Moderate- Income persons
  - How the project will align with the goals and priorities of the Dane County Consolidated Plan
  - The target population or community to be served

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| <b>Excellent</b> – Community Needs are greatly described & identified as they relate to the proposed project; Applicant discusses meeting National Objective of benefitting LMI; detailed information on how project aligns with Consolidate Plan; The target population or community to be served is described. | 15 – 20 points |
| <b>Good</b> – Community Needs are described & identified; National Objective of serving LMI is somewhat clear. Basic information on aligning with Consolidated Plan, and target population/community   | 7 – 14 points  |
| <b>Average</b> – Community Needs are somewhat described and identified; and 1-2 areas are briefly answered. National Objective of serving LMI, goals and priorities may not be clear.  | 1 – 6 points   |
| Does not provide justification   | 0 points       |

**Project Approach (35 points):**

The application must describe what the program/project will do, how it will be implemented, operated, and administered within a realistic time period, how the services or activities will be provided, and how low-income participants will access services.

- **Project Description & Scope of Work:** (1) A description of the work that will be undertaken and how the work will address the identified need. This includes (2) program structure, (3) relevant eligibility guidelines, (4) a clear referral process, (5) income documentation, (6) program capacity to serve clients, (7) language access needs, and (8) a waitlist process. (worth up to **25 points**).

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| <b>Excellent</b> – Project Description & Scope of Work are clear. All 8 requirements are described in detail and there is a thorough understanding of how the project will be delivered. | 18 – 25 points |
| <b>Good</b> – Project Description & Scope of Work are clear. 6-8 requirements are described in detail. There is a basic understanding of how the project will be delivered.              | 9 – 17 points  |
| <b>Average</b> – Project Description & Scope of Work are somewhat clear. 1-5 requirements are described. Limited understanding of how the project will be delivered.                     | 1 – 8 points   |
| Does not provide justification   | 0 points       |

- **Outreach and Accessibility:** Describes any initiatives that will inform potential participants of the services/activities to be provided; or how applicant will make people aware of the program (i.e. newsletters, presentations, radio shows, word-of-mouth, newspaper ads, etc.). (worth up to **5 points**)

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| <b>Excellent</b> – There is clear information on how the agency will provide outreach to potential clients, and lists 4-5 ways that they will make people aware of the program. | 5 points     |
| <b>Good</b> - There is some information on how the agency will provide outreach to potential clients, and lists 2-3 ways that they will make people aware of the program.       | 3 - 4 points |
| <b>Average</b> - There is little information on how the agency will provide outreach to potential clients, and lists 0-1 ways that they will make people aware of the program.  | 1 - 2 points |
| Does not provide information on outreach or accessibility   | 0 points     |

- **Outcomes/Proposed Accomplishments:** Describes how outcomes will be achieved, as described in the timeline and implementation plan. Indicates how the agency will measure success of the project. (worth up to **5 points**)

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| <b>Excellent</b> – Clearly describes how outcomes can be achieved by this project. References implementation plan and timeline, and accomplishments can be reasonably expected. Applicant describes how they measure success beyond just numbers.          | 5 points     |
| <b>Good</b> - Describes how outcomes can be achieved by this project. References implementation plan and timeline, and accomplishments can be reasonably expected. Somewhat clear on how they measure success beyond just numbers.                         | 3 - 4 points |
| <b>Average</b> – Basic description of how outcomes can be achieved by this project. May reference implementation plan and timeline. Accomplishments are not completely reasonable based on timeline. Little or no information on how they measure success. | 1 - 2 points |
| Does not provide information on how outcomes will be achieved.   | 0 points     |

**Experience and Qualifications (15 points):**

The application provides documentation to justify the organization’s capacity to conduct this project, which is consistent with the organization's mission.

- **Organization and Staff Experience and Qualifications:** Application describes both the organization’s and staff’s experience to undertake the proposed project. Organization has experience providing services to low- and moderate- income persons. (worth up to **10 points**).
  - Organization lists similar projects undertaken in the past. Includes how the organization has experience providing services to low- and moderate- income populations.

- Describes the experience and qualification of key staff to be assigned to the project. Key staff are identified as the individuals (paid or volunteer) with a large amount of decision-making role within the agency.

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| <b>Excellent</b> – Organization has undertaken similar projects in the past, lists the projects, and identifies key staff with decision-making roles who are well-qualified to carry out the project. Organization has 2 or more years of experience serving LMI persons. | 8 - 10 points |
| <b>Good</b> – Organization has undertaken similar projects in the past, lists the projects. Staff are identified and qualified, but it's not clear on roles or decision-making capabilities. Organization has 1-2 years of experience serving LMI persons.                | 4 – 7 points  |
| <b>Average</b> – Organization has limited experience with similar projects. Staff are listed but roles are not clear. Organization has less than 1 year of experience serving LMI persons.  | 1 – 3 points  |
| Does not have any experience with similar projects or serving LMI   | 0 points      |

- **Staff Turnover:** Staff turnover is minimal (worth up to **5 points**).

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| Staff Turnover in past year is less than 20% | 5 points |
| Staff Turnover in past year is 20% or more   | 0 points |

**Financial Information (20 points):**

The application includes a realistic, clear and complete budget (all elements in the uploaded budget are complete), and explains or justifies how the proposed budget line items will support a successful project in the Budget Summary & Justification. The summary should not be a reiteration of the budget, or mathematical equations, but should describe relevant information on line items that explain the use of funds. (worth up to **20 points**).

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| <b>Excellent</b> – Budget is realistic, clear and complete. Budget summary clearly explains how the use of funds will support a successful and viable project; line items are explained, which give a thorough understanding of costs. | 15 – 20 points |
| <b>Good</b> - Budget is included, but may lack clarity or completeness. Budget summary somewhat explains how the use of funds will support the project; line items may be explained, which give a snapshot of some of the costs.       | 7 – 14 points  |
| <b>Average</b> - Budget is included, but may not be realistic or lacks clarity/completeness. Little explanation of costs in Budget summary and/or line items.  | 1 – 6 points   |
| Does not provide justification; Budget not uploaded  | 0 points       |

**Past Performance (10 points):**

This section is reviewed and scored by Staff.

If the organization has been previously selected for/awarded funding, a review of the last five years past expenditures and performance shows that the organization has been able to meet timelines and goals reasonably, and is responsive to all communications from the CDBG/HOME staff (e.g., no unexpended dollars from prior years; funds are used in a timely manner and invoices submitted; has regular contact with staff and responds to requests; agency relinquished funds). Compliance with the contract will include, but not be limited to, timely and accurate submission of beneficiary/program reports and expenditure invoices, adherence to the scope of services, and quality of work. Applicants will be ineligible to receive funds if they have a significant amount of funds left over from prior years. (worth up to **10 points**).

Information will be provided to the Application Review Team by CDBG/HOME staff.

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|--|-----------------------|
| <b>Accurate / Consistent Spending of Funds</b>   | <b>Up to 6 points</b> |
| The agency has not returned funds in excess of 1% of awarded funds and does not have unexpended funds                    | 5 – 6 points          |
| The agency has not returned funds in excess of 10% of awarded funds <u>but</u> has unexpended funds from 2 years or more | 2 – 4 points          |
| The agency has significant returned or leftover funds  | 0 – 2 points          |
| <b>Program or Financial Report deadlines are met</b>   | <b>Up to 2 points</b> |
| <b>Responsive with Communications</b>  | <b>Up to 2 points</b> |

## 2027 CDBG/HOME Application Review Criteria

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|------------------|--|
| Applicant:       |  |
| Program/Project: |  |
| Date of Review:  |  |
| Reviewer:        |  |

| Application Review Criteria                   | Maximum Points | Points Awarded |
|---|----------------|----------------|
| 1. Need and Priorities                        | (20)           |                |
| Description of Needs & Priorities             | 20             |                |
| 2. Project Approach                           | (35)           |                |
| Project Description & Scope of Work           | 25             |                |
| Outreach & Accessibility                      | 5              |                |
| Outcomes/Proposed Accomplishments             | 5              |                |
| 3. Experience and Qualifications              | (15)           |                |
| Experience and Qualifications                 | 10             |                |
| Staff Turnover                                | 5              |                |
| 4. Financial Information                      | (20)           |                |
| Budget & Summary / Justification              | 20             |                |
| 5. Past Performance (Staff Review)            | (10)           |                |
| Accurate/Consistent Spending of Funds         | 6              |                |
| Program or Financial Report deadlines are met | 2              |                |
| Responsive with Communications                | 2              |                |
| <b><u>TOTAL POINTS</u></b>                    | <b>100</b>     |                |