

# Village of Maple Bluff, Wisconsin Tax Incremental District (TID) Advisory Committee

## Scorecard Overview and Scoring Method

### Introduction

The TID Project Scorecard has been developed by the TID Advisory Committee to serve as an objective tool to provide developers feedback on project proposals. The scorecard translates inputs from the community, village government, and developers to create a balanced assessment of a project's viability. As a working document, the tool also provides guidance as to actions that the developer, village, or community can take to increase the likelihood of success for a proposed project.

### Using a Scorecard

The TID project scorecard is a matrix of key attributes that define a project. The scorecard is designed to help developers, the community, and village government understand the nature of a project and determine its potential for success. Like all tools, one must be careful to use the scorecard properly and within the context of its capabilities. It is important to remember that:

***The scorecard should not be used as a stand-alone assessment.***

It is important to understand that the scorecard is but one tool that the TID Advisory Committee and others can use to enhance the probability that a project will succeed. The scorecard is a catalyst for discussion and continuous improvement of project proposals and its product is but one element to be considered when evaluating a project.

***The scorecard should not be used to compare one project to another.***

The scorecard is designed to compare a project's attributes to desired project characteristics. Though it is possible to use the scorecard outputs to compare one project to another, the scorecard is designed to measure to a standard (the stated criteria) rather than to compare relative strengths and weaknesses. Using the scorecard to compare one project to the next could likely result in a project selection that is, in the end, undesirable.

***The scorecard does not have a minimal threshold for success.***

The scorecard provides a foundation for evaluating a project and identifying opportunities for improvement using a rating rubric and scoring matrix. The scorecard outputs provide insight as to a project proposals performance relative to the stated criteria. The tool aids in the development of consensus regarding a proposal's overall desirability and identifies those criteria that present a high-potential for improvement. Therefore, there is no "minimum score" to move a project forward, rather the scorecard helps to build a more complete understanding of a proposal's pro's and con's.

***The scores should not be considered as "hard and fast" numbers.***

The TID Project Scorecard translates the "voice of the community" (VOC) into 47 unique attributes that are grouped into 10 broad categories. Each attribute is rated relative to its overall desirability and the priority it has relative to other criteria. It is important to understand that though the scorecard is designed to drive consensus around a proposal, it is likely that ratings and priorities will change as conditions dictate. Again, the scorecard product is a snapshot in time as to how well a proposal compares to the stated criteria.

## **Scoring Methodology**

For each attribute or for a group of attributes, a priority has been assigned relative to the desirability of the attribute to the overall project acceptance. It is important to realize that by their nature, some attributes may be diametrically in opposition to one another. Therefore, it is impossible for a proposal to achieve a "perfect score". Rather, the scorecard helps to identify optimal trade-offs between different attributes and produce a proposal that best serves the needs of all stakeholders.

The scorecard includes key attributes and defining criteria for each. In addition, the scorecard includes a prioritization scheme. When a proposal is advanced the TID Committee will discuss and assign a rating to each attribute or group of attributes (in yellow field in spreadsheet) using the following scale:

- a) Highly desirable – 5 points
- b) Desirable – 4 points
- c) Highly acceptable – 3 points
- d) Acceptable – 2 points
- e) Marginally unacceptable – 1 point
- f) Unacceptable – 0 points

Once the rating has been assigned, the scorecard will multiply the rating by the following priority scoring scheme:

- a) High priority – 4 points
- b) Medium priority - 2 points
- c) Low priority – 1 point

Finally, the scorecard tabulates individual attribute, group, and overall scores as a basis for ongoing proposal evaluation and discussion. Ultimately, these scores provide the foundation for discussion of project improvement opportunities.

## **Summary**

The scorecard is a tool that the TID Advisory Committee and others will use in working with developers, the community, and village government to continuously improve the quality of project proposals, and ultimately assure that the projects selected best meet the needs of all stakeholders.

It is important to remember that the scorecard is not a stand-alone tool – rather it provides a framework for a broader discussion of a project. Further, the scorecard is intended to measure a project’s characteristics against stated criteria, rather than as a tool to compare one project to another. And finally, it is important to remember that the scorecard is a tool to gain common understanding and a consensus of project attributes and their impact on our community.

	A	B	C	D	E	F	G	H	I	J	
1	<b>TID / VOC worksheet</b>										
2	Item rating scale: 5 - 4 desirable, 3 - 2 acceptable, 1 - 0 unacceptable										
3	Priority rating scale: High = 4, Medium = 2, Low = 1										
4	Category / Attribute	Desired	Acceptable	Unacceptable	Weight	Rating	Weight	Score	Max	Mid point	
5	<b>Community Planning</b>										
6	Align to Gateway Plan	Consistent with plan	Spirit of plan with deviation	Use counter to plan	Medium	0	2	0	10	5	
7	Align to Comprehensive Plan	Consistent with plan	Spirit of plan with deviation	Use counter to plan	Medium	0	2	0	10	5	
8	Align to Zoning	PUD needed	Current Zoning	N/A	Low	0	1	0	5	2.5	
9	Impact on village services	No Impact	Little Impact	Substantial Impact	Low	0	1	0	5	2.5	
10						Section Totals	0		0	30	15
11	<b>Site</b>										
12	Open Space	some	minimal	none	Medium	0	2	0	10	5	
13	Setbacks	>20'	11' - 20'	<11'	Medium	0	2	0	10	5	
14	Screening/buffering	Opaque	moderately opaque	none	High	0	4	0	20	10	
15	Site Aesthetics	high	medium	low	Medium	0	2	0	10	5	
16	Storm water management plan	exceeds DNR req	meets DNR req		Low	0	1	0	5	2.5	
17	Access	single access off Commercial			Low	0	1	0	5	2.5	
18	Soil remediation/Water table plan	formal proj approach	conceptual proj approach	no plan	Medium	0	2	0	10	5	
19	Site consolidation	include 2 parcels to south			Low	0	1	0	5	2.5	
20						Section Totals	0		0	75	37.5
21	<b>Structure - visual</b>										
22	Street presence	articulation of façade and unit entrances	articulation of façade	flat façade	High	0	4	0	20	10	
23	Exterior materials	stone, brick, hardy plank	smartsiding, metal, cultured stone	vinyl, stucco, efis	Medium	0	2	0	10	5	
24						Section Totals	0		0	30	15
25	<b>Structure - size</b>										
26	Massing - toward Sherman	majority of massing in front of site, stepped building if over 2 stories	meets current zoning, no stepped building	massing toward back of site	High	0	4	0	20	10	
27	Rear Upper floor setback	10' or greater step back of building above second level façade	less than 10'	none	Medium	0	2	0	10	5	
28	Floor to area ratio	<91% (excluding underground parking/unit storage, that extends less than 3' above grade)	91%-129% (excluding underground parking/unit storage, that extends less than 3' above grade)	greater than 129% (excluding underground parking/unit storage, that extends less than 3' above grade)	High	0	4	0	20	10	
29	Density @ 100% residential	26 or less	27 - 31 dwelling units	greater than 31	High	0	4	0	20	10	
30	Overall height	35 or less	36-40	greater than 40	High	0	4	0	20	10	
31						Section Totals	0		0	90	45
32	<b>Structure - use</b>										
33	Mixed use impact on neighbors	minimal impact to neighbors	moderate impact to neighbors	great impact on neighbors	Medium	0	2	0	10	5	
34	Unit diversity	1, 2 & 2+ bedrooms	1-2 bedrooms	all one bedrooms	Medium	0	4	0	20	10	
35	Services for Maple Bluff residents	desired to have services that cater to current residents	no service to current residents	n/a	Low	0	2	0	10	5	
36	Amenities	amenities consistent with high end development	amenities consistent with standard development	no amenities	Low	0	1	0	5	2.5	
37						Section Totals	0		0	45	22.5
38	<b>Sustainability</b>										
39		built to LEED Certification	For this criteria answer "yes" = 4, answer "no" = 1		Medium	0	2	0	8	2	
40						Section Totals	0		0	8	2
41	<b>Parking</b>										
42	Resident Parking	underground	covered	surface only	High	0	4	0	20	10	
43	Guest/Commercial	surface ok in conjunction with underground	n/a	n/a	Low	0	1	0	5	2.5	
44	Spaces - residential	exceed code minimums	code minimums	does not meet code minimum	Medium	0	2	0	10	5	
45						Section Totals	0		0	43	19.5
46	<b>Ties to Community</b>										
47	Effects on adjacent property										
48	Ties to village residents										
49	Community acceptance										
50	Support of adjacent landowners	detailed plan with schedule	conceptual plan	no plan	High	0	4	0	20	10	
51	Support of community										
52						Section Total - Quality of Plan	0		0	20	10

	A	B	C	D	E	F	G	H	I	J
1	TID / VOC worksheet									
2	Item rating scale: 5 - 4 desirable, 3 - 2 acceptable, 1 - 0 unacceptable									
3	Priority rating scale: High = 4, Medium = 2, Low = 1									
4	Category / Attribute	Desired	Acceptable	Unacceptable	Weight	Rating	Weight	Score	Max	Mid point
53	Financial viability									
54	Number of units									
55	Type of units commercial / residential									
56	Ownership / lease model									
57	Price / rent									
58	Increment calculation									
59	Developer experience with TID									
60	Developer experience with similar project									
61	Developer partnerships / team capabilities									
62	Proof of Financing	detailed plan	conceptual plan	no plan	High	0	4	0	20	10
63	Section Total - Quality of Plan					0		0	20	10
64	Marketing Plan									
65	Market assessment									
66	Target market									
67	Target demographic	detailed market assessment/plan	conceptual plan/assessment	no plan	Medium	0	2	0	10	5
68	Target price point									
69	Section Total - Quality of Plan					0		0	10	5
70	Summary									
71	Total of all scores	0								
72	Total / max scores	371								
73	Total / mid scores	181.5								