INSTITUTE of MUSEUM and LIBRARY SERVICES

2001 Field Reviewer Handbook

Conservation Project Support

For information, call IMLS: (202) 606-4641 or e-mail: sshwartzman@imls.gov

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I. The CP Review Process

Thank you for offering to serve as a Conservation Project Support field reviewer. We have selected you to review this year's applications because of your expertise in conservation and collections care issues.

The staff at IMLS has prepared this handbook specifically for field reviewers. It will provide you with the procedural information you need. Please use it in tandem with this year's *Conservation Project Support Grant Application and Guidelines*. Even if you are an experienced reviewer, you will need to refresh your memory and note any changes.

Before reading the handbook, please do the following:

- Read the Reviewer Checklist included in your review package.
- Mail the card to IMLS (attached to the folder) verifying that you have received all of the materials.

WHAT IS CONSERVATION PROJECT SUPPORT?

Conservation Project Support (CP) is an annual, Federal grant program that awards applicants up to $50,000 in matching funds. The program helps museums identify conservation needs and priorities and perform activities to ensure the safekeeping of their collections.

We fund general conservation surveys, detailed condition surveys, environmental surveys, treatment of collections, conservation research, staff training and environmental improvements. *Please remember that we will support any type of conservation project if it meets the institution's most urgent conservation needs.*

YOUR ROLE AS FIELD REVIWER

We selected you from our list of prospective reviewers because of your technical knowledge of conservation issues and practices. All CP applications go through two levels of review—field review and panel review. Your job is to provide the first level—the highly detailed, technical field review.

After looking at a select group of project proposals, you will write evaluations and assign corresponding scores. You must decide if a project seems feasible based on its design, methods, personnel and budget, and whether it meets the institution's highest conservation needs. Each proposal that you read will also be read by another field reviewer.

THE ROLE OF THE PANEL REVIEWER

Three separate groups of CP panel reviewers meet in Washington, DC about four months after the start of the field review process to conduct second-level evaluations of all the applications. Our panelists are highly respected conservators and museum professionals. In many cases, we select them because of their superior performance as CP field reviewers in prior years.

Several weeks before the panel meeting, we send each panelist approximately 30 applications, each with its two corresponding field review sheets. Panelists use *your* technical reviews (and those of your fellow field reviewers) to help them in their decision making process. **This makes it essential that you provide a thorough review with helpful detailed comments.**

Panelists do not have the time to do detailed, technical reviews; each of them has many more applications to read than does any one field reviewer. IMLS staff and the CP panelists are relying on you to point out specific strengths and weaknesses of each proposal you evaluate.

During each panel meeting, two panelists present their applications to the full panel, discussing each application and providing funding recommendations. Panelists may recommend funding an entire project or only part of a project; they may recommend against funding a project or propose funding a project with a specific contingency. When further questions arise, the panel may discuss a particular application in greater detail. In conclusion, the panel makes final funding recommendations to IMLS.

FUNDING POLICIES

ELIGIBLE PROJECTS

You will find a full discussion of project eligibility in Part 2 of the *Conservation Project Support Grant Application and Guidelines*. Types of projects that are eligible for funding include

- General survey of collections and environmental conditions
- Detailed condition survey of collections
- Environmental survey
- Environmental improvements
- Research in conservation
- Treatment of collections
- Training in conservation

EXCEPTIONAL PROJECTS

IMLS supports exceptional projects whose results will have a considerable impact upon the museum field. Applicants may request up to $75,000 for exceptional projects. You should provide the same level of technical review for these applications as you do for all others; additionally, you must consider whether the project will have broad applicability for conservation care beyond the individual museum applicant.

If an applicant requests over $50,000 for a project that will *not* widely benefit conservation care in museums, evaluate the application as you would any other (i.e., *do not* consider it a proposal for an exceptional project). We will ask our panelists whether the project can be successfully completed with no more than $50,000 in IMLS funds.

EDUCATION COMPONENT

Applicants have the option to apply for up to an additional $10,000 to develop and implement educational activities that relate directly to the proposed conservation project (refer to Page 2.4 of the Guidelines to see what IMLS will fund). Only applicants that submit a conservation project are eligible to submit an education component. Applicants that apply for the education component are required to complete a separate narrative and detailed budget as well as required supporting documentation in addition to meeting the requirements for Conservation Project Support. You, as a field reviewer, are NOT required to review or comment on the education component. However, we would appreciate any

written general comments on any technical aspects of the education component that you feel should be communicated to the applicant. The education component will not be scored. After reviewing all conservation projects recommended for funding, IMLS staff will determine which education components are funded. You may refer to Page 5.6 in the Guidelines to see what questions applicants for the education component must address.

GROUP PROJECTS

A group of museums may collectively apply for a CP grant as long as each museum individually meets all IMLS eligibility criteria.

INELIGIBLE PROJECTS

Conservation Project Support grant funds are *not* intended to support

- the regular, ongoing operating costs of an institution
- projects whose goals are primarily aesthetic, educational, or exhibition-driven
- projects that are primarily collections management activities
- projects that are primarily international in scope or that involve the reintroduction of species into the wild
- projects for the construction or major renovation of facilities
- the installation of security or fire suppression systems
- the installation or purchase of heating, ventilation, and air conditioning (HVAC) systems for the *entire* museum
- the acquisition of objects or species for the collection

Please call the IMLS staff at (202) 606-8539 if you have any questions about a project's eligibility.

WHEN WILL IMLS ANNOUNCE THE AWARDS?

We will announce the awards for this deadline in April of 2001. All applicants receive notification by mail, whether or not they have been funded. You will receive a list of grantees at the same time as the applicants.

CP Reviewer Preparation

GETTING STARTED

Before you start reviewing, read this year's *Conservation Project Support Grant Application and Guidelines*. You *must* understand the goals and priorities of IMLS. Even if you are very familiar with the CP program, remember that we revise the application guidelines each year; they may have changed in ways that will affect your evaluation.

After reading the guidelines, study this handbook carefully, making sure that you understand your role and the tasks that lay ahead. As you review, try to follow the time-line

in the back; these steps are based on suggestions of previous CP field reviewers. Reviewers tell us that it takes a *minimum* of two hours to evaluate each application, so it's important to stay on schedule. Periodically throughout the review period, scan the list of helpful reminders on the inside back cover of this handbook.

HOW ARE APPLICATIONS ASSIGNED?

We organize applications for field review according to three items on the application face sheet:

- Type of Project
- Collections Category
- Types of Materials

We try to match you as closely as possible with applications corresponding to your area(s) of expertise.

Many combinations of project and material types are possible, so you *may* not receive your first choice of projects to review. We have assigned you applications that we believe you are qualified to review (see note below); if you are uneasy about any of our selections, please call us immediately.

Note: Certain projects, such as general conservation surveys and environmental surveys or improvements, are likely to involve a variety of material types. We assign these projects to field review on the basis of the dominant material; we do not *expect you to have expertise with each type.*

CONFIDENTIALITY

We will not release your name to the institutions you evaluate. In turn, we ask that you not discuss your assigned applications with anyone else. If you have any questions about an application, please call IMLS; **do not** contact the applicant.

Application Materials

Each application you receive will contain the following:

- face sheet
- financial statements (Forms A & B)
- project budget
- application checklist
- statement of purpose
- project narrative(s)
- schedule of completion
- supporting documents
- group application agreement, if applicable

Note: An application is complete only if it contains all of the elements listed above. If any item is missing, please call us immediately at (202) 606-8539.

We suggest that you read through your applications twice: first, to get a general sense of their content and quality; and second, to evaluate and score them (see the field reviewer schedule of completion on page 18 for the time frame we suggest). Following is a brief

FACE SHEET

description of each item and what you should look for during your review.

Scan this page to find out basic information about the proposal: e.g., the type of project, who the project consultants are, types of materials involved. The project summary found under question 27 should give you a good sense of what the applicant intends to accomplish.

FINANCIAL STATEMENT FORMS A & B

You will find the two most recent years of financial reporting for each applicant. Try to get a general sense of the fiscal health of the institution; also, try to determine whether the monetary commitment to the project is reasonable and appropriate. Look at income and expense figures to see if the applicant can successfully complete the proposed project. You do not need to spend a lot of time studying Forms A and B.

PROJECT BUDGET

Using your knowledge of similar projects, look over individual items and total project costs. Applicants must justify all costs in their project narratives. Look particularly for justification of consultant fees and travel expenses. Note, however, that consultant fees may vary due to the individual's specialty, geographical location and cost of living.

Applications recommended for funding should have budgets that reflect no more and no less than the total amount necessary to successfully complete the project.

IMLS funds may be used to pay up to one-half the cost of the project. However, applicants occasionally request more than 50% of the total project costs. If you receive such an application, please provide a complete review of it and make a note of the situation in your comments. IMLS staff will resolve the problem.

Applicants submitting an education component are required to submit an additional detailed budget identifying proposed educational activities. You are NOT required to evaluate this education budget (Pages 8.11-8.12)

Note: See the 2001 Conservation Project Support Grant Application and Guidelines *for applicant instructions on developing the budget.*

STATEMENT OF PURPOSE

Use the statement of purpose to measure the museum's performance in carrying out its mission. Try to determine if the proposed conservation project is appropriate to the museum's larger purpose.

PROJECT NARRATIVE

The narrative draws all of the elements of a proposal together in response to the eight questions in the *2001 Conservation Project Support Grant Application and Guidelines.* Those questions and the additional instructions are duplicated below. Applicants submitting an education component are required to submit additional narrative responses. You are NOT required to evaluate this education narrative. The education component narrative questions are not listed in this handbook, but may be found in the Application Guidelines on Page 5.6.

1. WHAT IS THE DESIGN OF THE PROJECT?

Describe

- project activities in detail
- goals and objectives of each task and how they will be met
- amount of time staff and consultants will spend on the project
- why your schedule of completion is appropriate
- any intended products (written reports, plans, publications, etc.)
- plans to protect objects from disruptive elements (e.g., construction dust, movement of objects)

2. WHAT IS THE OBJECT(S), HISTORIC STRUCTURE(S), OR SPECIMEN(S) THAT IS THE FOCUS OF THIS PROJECT?

Describe objects or specimens involved in this project and their

- types, numbers, and materials
- relevance to the museum's overall collections
- relevance to your institutional mission
- relevance to your local, regional, national or international community

FOR TRAINING PROJECTS OR PROJECTS THAT INCLUDE TRAINING AS A MAJOR COMPONENT ONLY, discuss

- what collections will benefit directly or indirectly from the training (this could include an overview of your entire collection)

3. HOW DOES THE PROJECT RELATE TO YOUR MUSEUM'S ONGOING CONSERVATION ACTIVITIES?

Applications for a general conservation survey should outline the project activities in terms of the museum's program for collections management.

Applications for other types of projects should describe

- a discussion of previous and current conservation activities
- how the project will further the museum's institutional plan for conservation
- accomplishments of any previously awarded IMLS grant(s)
- implementation of recommendations from general conservation survey or other prior surveys
- why this project is your museum's greatest collections care need

4. WHAT ARE THE ANTICIPATED BENEFITS OF THIS PROJECT?

Describe

- the benefits of this project for your museum, your museum's audience or the museum field
- how the benefits will be used by your museum and disseminated to your audiences.

5. HOW WILL THE APPLICANT ENSURE THAT ONGOING MUSEUM FUNCTIONS ARE NOT INHIBITED BY THESE PROJECT ACTIVITIES?

Describe the financial and other resources the museum will contribute to the project to ensure that normal museum functions (including conservation activities) are not disrupted.

6a. WHAT ARE THE PROPOSED CONSERVATION METHODS AND WHY ARE THEY CONSERVATIONALLY SOUND?

Note: If you submit a training project only answer alternate question 6b, rather than 6a. However, if you submit a project that includes training as a major component, then you must answer both questions 6a and *6b.*

Describe the methods in terms of their

- efficiency
- reliability
- innovativeness (if applicable)
- conformity to currently accepted conservation methods for this type of work (if controversial or unproven conservation techniques are proposed, state why these techniques were chosen)
- safety

6b. DESCRIBE YOUR RATIONALE FOR THE PROPOSED TRAINING CURRICULUM INCLUDING:

- training materials
- training methods
- audience served
- intended benefits for the applicant and trainees
- teaching experience of instructor(s)

7. HOW DOES THE PROJECT BUDGET SUPPORT THE PROJECT GOALS AND OBJECTIVES?

Describe

- how the budget was developed
- how the projected costs were determined
- why the costs are reasonable and appropriate
- cost factors involved in selecting personnel, materials, equipment location, or scheduling

8. WHAT ARE THE QUALIFICATIONS AND RESPONSIBILITIES OF THE PROJECT PERSONNEL?

Briefly describe the responsiblities of all key project consultants and key project staff including volunteers; explain how each is qualified to do the assigned work. Include an updated resume (**of no more than two pages each**) for all personnel identified on this page. Each resume should clearly reflect that person's abilities to carry out the project activities.

For any project personnel that have *not* been chosen (i.e. consultants, interns) summarize the person's required qualifications under question 8 and attach a separate position description.

Do not provide qualifications, resumes or position descriptions for personnel whose role in the project is primarily administrative.

SCHEDULE OF COMPLETION

The schedule of completion should help you determine if the applicant has allowed enough time for the project and whether the project activities are logically ordered. The schedule may be in the form of a chart, a paragraph, or an outline, and should cover all of the activities detailed in question one of the narrative. Projects may run for a maximum of two years. Applicants submitting an education component should include education activities on this schedule.

SUPPORTING DOCUMENTATION

We require all applicants to submit supplementary documents in support of their proposal. Depending on the type of project, applicants might submit

- letters of commitment for project consultants
- resumes of key project personnel
- general conservation survey report or CAP report
- institutional plan for conservation
- treatment plans or proposals (for treatment projects)
- training curricula (for training projects or projects that include a training component)
- sample survey forms (for general survey projects)
- photographs/slides (required for treatment projects)

Other optional supporting material may include

- brochures/catalogues
- collections policies
- detailed conservation surveys
- equipment specifications
- MAP assessments
- maps/diagrams
- photographs/slides/videos
- letters of support

Note: you can find descriptions of required and suggested supporting documentation for each project type in Part 2 of the 2001 Conservation Project Support Grant Application and Guidelines.

Applicants (except those with living animal collections) may support their conservation needs and priorities by means of a general conservation survey/CAP report, institutional plan for conservation or other statement.

Most often you will see a general conservation survey/CAP report. Since these reports can be very long, we allow applicants to excerpt the part(s) that relates directly to the proposed project.

Some applicants may send an institutional plan for conservation along with their general survey/CAP report. Applicants that do not have a general survey/CAP report may send only an institutional plan for conservation. Those without an instutional plan for conservation plan may send a letter explaining the importance of their project and how it fits into their overall conservation plans and activities. You must ask yourself if the report, plan or letter justifies and fully supports the proposed activities.

We have already checked each *original* application to make sure all required supporting documentation is included. Your task is to consider whether the documentation is adequate, appropriate and convincing. If you think any documentation does not sufficiently support one (or more) of the eight narrative responses, describe the problem in your review of that section. You should also discuss any general problems with the supporting documentation in the space for summary comments.

II. Step-by-Step Application Review Instructions

This section of the handbook contains detailed information on how to review a CP application.

IMPORTANT! Experienced reviewers estimate that it takes at least two hours to evaluate one application (for all of your assigned applications, a total of 14 hours over a four-week period). If you are a first-time CP reviewer, you may need even more time.

We recommend the step-by-step reviewing process outlined below.

CHECK SHIPPING BOX

1) If you haven't already done so, check your shipping box!
Call us immediately if any of the items on the welcome letter in your folder are missing.

CONFLICT OF INTEREST

2) Review your list of applications to see if there are any potential conflicts of interest. You have a conflict if:
   - You, your spouse, or minor child are involved with the applicant institution, or in the project described in the application, as a paid consultant or through other financial involvement.
   - The application is presented on behalf of an institution with which you, your spouse or minor child are negotiating future employment.
   - Through prior association as an employee or officer, you have gained knowledge of the applicant which could preclude objective review of its application. (Past employment does not by itself disqualify you, as long as you can review objectively.)

You are required to sign and return the conflict of interest statement with your review sheets.

Other conflicts may arise if you have served as a CAP surveyor or conservation consultant for an applicant institution or have recently applied for a position at an applicant institution. We rely on you to determine if you can objectively review an application. You should *never* apply prior knowledge of an institution to your reading of a CP application.

Once you have reviewed an application, you should never represent the applicant (concerning the application, or any grant that may result from it) in dealings with the Institute of Museum and Library Services or another Federal agency.

APPLICATION COMPLETENESS

3) Check your applications to make sure that all required information is included.
We check the original application only. We do not check every page of each reviewer copy for completeness. *If any application appears to be incomplete, call us immediately.* We will forward the missing material to you. DO NOT penalize the applicant for information missing in your copy of the application.

READ APPLICATIONS

4) Read your applications to develop a feel for the range of responses.
Before reading your applications, reread the narrative questions and guidelines on pages 5.3–5.6 of the *Conservation Project Support Grant Application and Guidelines* booklet. The listed items represent the types of information you should look for in the applicant's responses and should serve as guideposts for your review.

EVALUATE APPLICATIONS

5) Read your applications again. Take notes as you read. Draft your comments for each of the eight narrative responses.
   - Use your professional knowledge and experience to objectively assess the information
     - you MAY NOT base your evaluation on any prior knowledge of an institution
     - if you question the accuracy of any information, call IMLS to discuss it; DO NOT question the applicant's honesty or integrity in your written comments
   - Consider whether or not this project meets the applicant's highest priority for collections care.
   - Address the applicant's *entire* response to each narrative question
   - Consider a project's strengths *and* weaknesses
     - acknowledge and compliment strengths
     - offer practical suggestions for improving weaknesses
   - Address the panelists—your professional peers
   - Judge the application on its own merits
   - Consider whether the applicant has the resources to successfully complete the project
   - Remember the panelists and the IMLS staff use your comments to help unsuccessful applicants improve their collections care and future applications
     - comments should be concise, easy to read and understand
     - comments should be specific to the individual applicant; vague, general statements are not helpful
     - comments should *analyze* the narrative section of the application; summarizing or paraphrasing the applicant's own words will not help the applicant
     - comments should address both positive aspects as well as areas for improvement

SAMPLE COMMENTS

See pages 16–18 for sample review comments.

6) Assign preliminary scores to each narrative section.
   Use a scale of 1 through 7
   1 =lowest; 7 = highest (see scoring definitions on page 13)
   - Use whole numbers only
   - do not use fractions, decimals, zeros, or more than one number.

We suggest that you use the *Start With 4* method to assign scores. If all field reviewers adopt this same approach, CP panelists will see greater consistency in the use of our scoring definitions. If you have questions please contact us at **(202) 606-8539**.

IMPORTANT! To help applicants understand and benefit from your reviews, make sure that your scores accurately reflect your written comments.

ASSIGN SCORES: START WITH 4

To *Start With 4*

- Finish drafting your narrative comments
  - Make sure that your comments accurately reflect your opinions
- 4 = **adequate (provides adequate support for project activities)**
  - Consider a score of 4 to represent an *adequate* range of project feasibility—think of 4 as your starting point.
- Adjust up or down from 4 according to your written comments. If the project seems
  - adequate or average—i.e., neither particularly strong nor particularly weak, but somewhere in the middle—retain the 4;
  - a little better than average, assign a 5;
  - much better than average, assign a 6;
  - minimally acceptable, drop down from a 4 to a 3;
  - inadequate, choose a 2.
  - Reserve a score of 1 for what appear to be overall *extremely* poor projects and a score of 7 for *exceptionally* good projects.
- Be fair and objective
  - Applications are not ranked by the scores you assign but by the relative performance of each application compared to all others. Awarding only high scores will not benefit those applicants; awarding only low scores will not penalize those applicants.

7) As you review, please keep the following three technical issues in mind: project eligibility, type face, application format. DO NOT consider them when determining your scores, however. We will assign penalties as needed.

ELIGIBILITY

We determine an institution's eligibility for CP funds by reading the responses on the Grant Processing Information Sheet, 8.17 #1-13 . You may read about eligibility requirements on pages 1.4-1.5 of the *Grant Application and Guidelines* booklet. If you feel that a particular project does not meet the IMLS CP eligibility requirements please contact the Office of Museum Services immediately. DO NOT under any circumstances contact an applicant directly.

TYPESIZE AND FORMAT

The application does not provide a form for the narrative part of the application. We allow applicants to divide up the space for narrative responses as they wish as long as all of the questions are addressed and in the order indicated in the application guidelines- <u>not to exceed six pages</u>. A minimum one-quarter inch margin should be left on the sides and bottom of the page.

We also require applicants to use a typesize that measures no more than six lines per vertical inch and to use standard spacing between letters.

Please use your common sense when judging typesize or page format. We developed these rules primarily to help reviewers. You don't need to actually measure the type; if you can read the text without eye strain, it probably meets our specifications.

If you do see a problem, however,

- Call IMLS
- Review the application. DO NOT lower an applicant's score because of reduced type or reformatting.
- DO NOT note the problem on your review sheet itself, but rather attach a separate note for IMLS only.

We will assign penalties as needed.

REVIEW YOUR WORK

8) Review your draft comments and preliminary scores.

When you are finished, proofread your review sheets. *We cannot accept a review sheet with even one missing score or comment.* (If you inadvertently skip something, we will call you to take the information over the phone.) Adjust your scores, if necessary, to more accurately reflect your written evaluation.

- Adjust them as necessary; scores should support comments and comments should justify scores.

WRITE SPECIFIC COMMENTS AND ASSIGN SCORES

9) Type your final comments and scores (for narrative section 1–8) on your review sheets: Enclosed for your convenience please find a diskette formatted for PC (Microsoft Word 6.0). Should you need a diskette formatted for Macintosh, please call IMLS at 202-606-8539. One will be sent to you immediately. Otherwise, you may recreate both sections of the CP Application Review Sheet at the back of this book on a computer, or copy the sheet at the back of this handbook, one for each application you are reviewing. Retain the same format as on our original form. If you choose to recreate the review sheet you do *not* need to include the lines.

Note: You might have to open up the actual Microsoft Word program in order to open the review sheet on the enclosed diskette.

For each application, you need to send us a review sheet containing

- written comments about the applicant's narrative responses
- a corresponding score for each response
- your overall assessment of the project
- summary comments about the project's strengths and weaknesses
- handwritten comments are difficult or impossible to read—use a typewriter or computer printer.
- make use of all the space provided on the review sheets (you can expand your comments if necessary)
- attach your reviewer label to the first page (bottom right) of each review sheet.

Your comments should be clear and specific, especially about any weaknesses you see. *Remember that panelists will be reading your comments; address your remarks to them,* ***not*** *to the applicant or IMLS staff.*

Your work will be most useful to the panelists if you refer directly to the applicants' statements. Panelists may either misunderstand or be forced to discount your judgments if your comments are vague or do not refer to specific statements in the narrative responses.

On pages 16-18, we have included some samples of the types of comments that are helpful to panelists. Please read them to get a general sense of the level of detail they require.

SELECTING SCORES

After you write your comments, select an appropriate score from 1 to 7 (1=lowest; 7=highest) for each of the eight narrative responses using the IMLS scoring definitions that follow. **Type** the scores (or write them **legibly**) in the space provided on your review sheets. Your written comments and corresponding scores should always support each other.

The definitions of the numerical scores are:

SCORE	DEFINITION
1	Applicant's response provides insufficient information for evaluation.
2	Applicant's response provides inadequate support for the proposed project activities.
3	Applicant's response provides minimal support for the proposed project activities.
4	Applicant's response provides adequate support for the proposed project activities.
5	Applicant's response provides good support for the proposed project activities.
6	Applicant's response provides superior support for the proposed project activities.
7	Applicant's response provides exceptional support for the proposed project activities.

DO THE APPLICANTS READ YOUR REVIEW SHEETS?

We relay to unsuccessful applicants (upon request) comments and recommendations made by field reviewers and panelists in reaching a final funding recommendation. In many cases, they use this information to strengthen their proposals for resubmission at a later time. So although applicants will not themselves read your evaluations, IMLS staff use your comments to convey helpful information to applicants. Your comments are extremely important to the panel reviewers, IMLS staff *and* unfunded applicants.

REVIEW SHEETS

On pages 20 and 21 you will find a sample review sheet. You may either remove the review sheet and duplicate it, or recreate it on your computer if you choose not to use the enclosed diskette. If you choose to recreate it, please make sure that you retain the same language and format as in the sample.

OVERALL ASSESMENT

10) In the boxes below the comments, provide your overall assessment of the project.
- Mark one box for each of the five categories.
- Your overall assessment should correspond to your specific narrative comments and scores.
- Partial Funding Option: We give you three options from which to choose your final funding recommendation. Check "partial" only if you do not want to support the project in its entirety but feel that a portion of the project can be accomplished without compromising the project goals. Clearly identify in your comments which project activities you wish to support and which project activities you do not wish to support.

SUMMARY COMMENTS

11) Type your summary comments, highlighting specific strengths and weaknesses of the project. Although this section is not scored, it provides an opportunity for you to
   - communicate overall impressions to the panelists; and
   - offer specific comments about why you want to support or not support a particular project.
   - you may include general comments about the technical nature of an applicant's education component (if applicable). *This is optional.*

SIGN REVIEW SHEET

12) Sign your name and attach a reviewer label to each IMLS sheet in the space indicated.

RETURN MATERIALS TO IMLS

13) You are required to submit only your original copy of each review sheet including:
   - museum name and log number
   - reviewer ID label at the bottom
   - your signature (on bottom of second sheet)
   - make sure when mailing your review sheets that they are single-sided!

14) Return the review sheets and signed conflict of interest statement to IMLS with your completed reviewer questionnaire to the address below:

IMLS
Office of Museum Services
1100 Pennsylvania Avenue NW, room 609
Washington, DC 20506
Attn: CP Review Sheets

OR you may **fax** them to: **(202) 606-0010**. Faxing will help expedite getting the review sheets to the CP peer review panel. If you fax your review sheets then you DO NOT need to send us your originals.

   - MEET THE IMLS RECEIPT DEADLINE! December 18, 2000
   - Don't forget to fill out your reviewer questionnaire (you may send it a few days later if you wish); it's your chance to let us know what you think about your review experience.

KEEP COPIES UNTIL MARCH 1, 2001

15) Keep your applications and a copy of your review sheets until March 1, 2001 (in case of loss in shipment or questions from IMLS staff).
   - Maintain confidentiality of all applications that you review.
   - After March 1, 2001, destroy the applications and review sheets (you may keep optional attachments such as catalogues or brochures).

You will have four weeks to complete all of the steps described above. We have provided you with a schedule of completion (see page 19) to help you pace yourself through the assigned tasks. Please complete your work on time! The entire process depends on promptness from our field reviewers.

Notes

III. Sample Field Review Comments

SCORE

Below are examples of the types of comments that panelists find helpful. We have selected these comments because 1) they are detailed and specific; 2) many refer back to the applicant's narrative response; and 3) all have been assigned appropriate, corresponding scores. Please try to provide the same level of detail and specificity in your field review comments. You will have different issues to comment on for the various applications you review.

2 **1. PROJECT DESIGN**

The presentation is spare. Installation of HVAC for the goal of controlling the environment in the only storage area for archives is simple, requiring only about two weeks. A major missing piece of information is that there is no indication that long term temperature and RH monitoring recommended in the 1997 CAP survey has been done. The archival collection will be moved out of the area of construction "taking about three weeks", but discussion of moving the collection "to another location" is vague. It is not clear how the archives are currently housed except that they are "filed" in office areas.

6 **2. IMPORTANCE OF THE OBJECTS/STRUCTURES/SPECIMENS**

The remaining 1,400 acres of the original 4,000 acre property contains all of the important estate structures and many of the most significant landscape features. The archival and three dimensional collections relate directly to documentation of the creation, and life of this important farm estate. The architectural quality of the buildings and the quality of the landscape features, many of which were designed by Frederick Law Olmstead, Sr., is extremely high.

3. RELATION TO ONGOING CONSERVATION ACTIVITIES

7 The narrative outlines the long history of preservation in this institution. The institution has recently undergone a major renovation with state of the art facilities including improved storage, HVAC, etc. In 1996, the application underwent a general conservation survey and developed a long-range conservation plan. Most of the recommendations in the survey have been satisfied. The institution also developed recommendations for the specific curatorial collections based on the general survey report and the Conservation Task Force. Five of the six collections ranked a detailed conservation survey as the most important priority to their specific collections. Most of the remaining recommendations are ongoing activities such as monitoring and improving training which is difficult to consider as "completed". The detailed survey is probably the most proactive step in the conservation care of these collections.

6 **4. ANTICIPATED BENEFITS OF THE PROJECT**

The ultimate benefit of this project comes at the end of Phase III, which will presumably continue after the current project ends. Treatment of this important manuscript clearly fulfills the institution's mission. The production of a high-quality facsimile (more safely made while the manuscript is disbound) will serve the scholarly community, and the safe display made possible after treatment will benefit the museum-going public as well. The project includes the preparation of an in-depth article on this work to be published in the conservation literature. This type of article allows the field as a whole to benefit from the experience gained through this project.

SCORE

3 **5. ONGOING MUSEUM FUNCTIONS**

Part of the project will be contracted to a regional conservation facility and will therefore not disturb ongoing museum functions. However, the proposal fails to address the issue of where the on-site activities to unframe, examine, and mat 104 items will be carried out. This is of utmost importance to the smooth functioning of the institution. It may also have a bearing on the likelihood of attracting an appropriate candidate to complete the work.

3 **6. (A)CONSERVATION METHODS OR (B) PROPOSED TRAINING CURRICULUM**

This is the only weak part of the application. Photos are not provided. Many of the paintings are clearly in distressed state and are much in need of treatment but proposals do not provide specifics on materials and techniques to be used. The lining techniques to be used are not specified. Many paintings identified as unvarnished are proposed to be varnished but there is no indication whether this issue has been debated.

6 **6. (A)CONSERVATION METHODS OR (B) PROPOSED TRAINING CURRICULUM**

Both the methods and the curriculum are very sound. Very well organized internship with specific directives and good support from staff. I would have been happy to have had such a well rounded and well supported internship. Very thorough survey and good documentation provided with application.

6 **7. PROJECT BUDGET**

The budget shows more than adequate time for the Director/Curator to prepare for the site visit (60 hours), and adequate time for the volunteer assistants to lend a hand to the project (object movement and the like). However, it is not clear how the consulting conservators will spend their time off-site (approximately two days per conservator to prepare the summary, in addition to three days spent on-site for the survey itself). It is wise for the museum to be a member of WACC – they receive "member rates" for services such as those outlined in this proposal. It is valuable that known consultants with past survey experience have been invited to participate in the survey. The full amount requested of IMLS-CP is a small one, and the project is designed to be effcient and effective.

5 **8. QUALIFICATIONS OF PROJECT PERSONNEL**

The consultants have excellent expertise and ability to carry out the work. The time allotted them however seems insufficient. Staff have good experience and knowledge to oversee the survey and plan for future treatment of their collection.

SUMMARY OF STRENGTHS AND WEAKNESSES

This is a well thought-out proposal to conduct work that is likely to help improve the conservation status of an endangered species. I found the proposal particularly meritorious for three reasons (1) the crisp writing style and direct approach to describing the tasks proposed, (2) the nice fit—helping a local and regionally endangered species at a place whose conservation mission is to do just that, and (3) the fact that this conservation project involving ex situ methods fits into a larger conservation scheme involving in situ methods.

SUMMARY OF STRENGTHS AND WEAKNESSES

This is a complete and comprehensive project. It concerns itself with a realistic and feasible scope of work and addresses immediate conservation needs. Because the project is one of many phases of small improvements within a larger building, this approach is well planned. Additionally, with an architect directing the effort, if unforeseen conditions arise, the appropriate disciplines can be coordinated under their effort. The incorporations of product data and outline specifications is also useful to determine the appropriateness of the equipment, however the inclusion of diagrams indicating where the equipment would be located would have been helpful. This would confirm that the placement of the units would not detract from the overall historic character and appearance of the building. The only draw back with these types of mechanical systems is that they are incremental and designed for relatively small spaces.

POOR COMMENTS

Listed below are "poor" comments from past reviewers. Comments that are poor are vague, irrelevant, reiterative, insensitive, or unclear. These comments hinder the evaluation process rather than help it.

To avoid making poor comments, DO NOT:

- Penalize an applicant because you feel the museum does not need the money—remember, any eligible museum may apply for and receive CP funds, regardless of need.
- Penalize an applicant because of missing materials, unless you have determined that the materials are missing from the original application. If you are missing *required* materials, contact IMLS *immediately*.
- Make derogatory remarks—offer suggestions for improvements rather than harsh criticism.
- Question an applicant's honesty or integrity. You may question the accuracy of information provided by the applicant.
- Offer or ask for irrelevant or extraneous information—your comments should concern only the information IMLS requests of applicants.
- Make reiterative comments—repeating information already stated in the proposal is not helpful—your judgements based on the information provided is what is helpful.

Each of the sample poor comments listed below is followed by an explanation of why it is a poor comment.

Relation to Ongoing Conservation Activities: "Appropriate for the collection." (vague)

Personnel: "...the incompetence of these two parties has been demonstrated. If there is a reason why the "Museum" would wish to retain a relationship with two professionals who botched the job, it is not contained in the application. I find no evidence in this proposal that the principals are technically competent." (derogatory)

Budget: "Budget estimates are based on actual amounts or experience with costs of other projects." (vague)

Anticipated Benefits of the Project: "A large percentage, 14 of the 63 paintings in their collection, will be treated and made exhibitable." (vague/reiterative)

Summary: "A basic project that is necessary to accomplish before any other collections conservation can occur." (vague)

FOUR-WEEK SCHEDULE OF COMPLETION

ACTIVITY 1	Check box for all materials, call if problems; check each application for completeness			
ACTIVITY 2		Read: *Reviewer Handbook, CP Application and Guidelines* booklet		
ACTIVITY 3		Evaluation of applications: 1st read to develop feel for range of responses		
ACTIVITY 4			2nd read-through, write comments and assign scores	
ACTIVITY 5			Review comments and scores; adjust as necessary	
ACTIVITY 6				Return Application Review Sheets
ACTIVITY 7				Complete and return Reviewer Questionnaire
ACTIVITY 8				Keep applications & your copies of review sheets for 90 days, and then destroy

SECTION I: CP APPLICATION REVIEW SHEET

APPLICANT _____ LOG NUMBER IC-_____

	SCORE
1. PROJECT DESIGN:	
2. RELEVANCE OF THE OBJECTS/STRUCTURES/SPECIMENS:	
3. RELATION TO ONGOING CONSERVATION ACTIVITIES:	
4. ANTICIPATED BENEFITS OF THE PROJECT:	
5. ONGOING MUSEUM FUNCTIONS:	
6. (a) CONSERVATION METHODS or (b) PROPOSED TRAINING CURRICULUM:	
7. PROJECT BUDGET:	
8. QUALIFICATIONS AND RESPONSIBILITIES OF PROJECT PERSONNEL:	

PLEASE INDICATE YOUR OVERALL ASSESSMENT OF THIS PROJECT

	YES	NO	PARTIALLY
1. Project is conceptually appropriate	❑	❑	
2. Project is technically appropriate	❑	❑	
3. Project is fiscally appropriate	❑	❑	
4. Project meets the museum's highest conservation needs/priorities	❑	❑	
5. Recommend for funding	❑	❑	❑

ATTACH REVIEWER LABEL HERE

SECTION II: CP APPLICATION REVIEW SHEET

APPLICANT _____ LOG NUMBER IC-_____

Please use the space below to summarize your comments about the project, detailing its strengths and weaknesses. The CP peer review panel relies on our comments during their decision-making process.

SUMMARY

Name (please print) _____

Signature _____ Date _____

PLEASE RETURN YOUR ORIGINAL AND FOUR COPIES TO IMLS AT:

IMLS
OFFICE OF MUSEUM SERVICES
1100 PENNSYLVANIA AVENUE, NW ROOM 609
WASHINGTON, DC 20506
ATTENTION: CP REVIEW SHEETS

FAX: (202) 606-0010

Remember to keep one copy for yourself until March 1, 2001!

REMINDERS—
FOR REVIEWING CP APPLICATIONS

WHEN STARTING...

- FIRST—Read the application guidelines and this handbook!
- Call IMLS *immediately* if you have any questions or problems **(202) 606-8539**
- Look carefully for conflicts of interest with your assigned applications. Call us if you see even the potential for conflict.
- Budget your time. Each application takes at least 2 hours!

WHEN REVIEWING...

- When reviewing, ask yourself
  - —Does this project address the institution's documented highest conservation needs/priorities?
  - —Is the project appropriate for this institution and these collections?
  - —Is the project feasible?
- Please call us if any required materials are missing.
- Write your detailed comments to help the panel reviewers—your peers.
- TYPE your comments.
- Use the enclosed diskette on which to type your reviews.

WHEN SENDING IN YOUR SHEETS...

- Send us <u>only</u> your original set of review sheets. You may fax us your reviews in lieu of mailing your original set.
- Review Sheets should include:
  - —narrative comments
  - —numerical scores
  - —an overall assessment of the application (*yes*, *no, or partially* responses)
  - —a summary of the project's strengths and weaknesses
- Return your review sheets on time.
- Return your conflict of interest statement with your review sheets
- Peer review works, thanks to you!