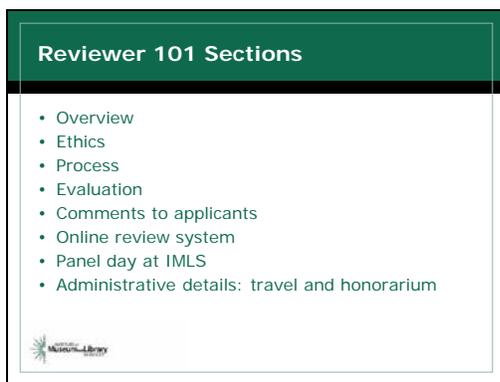


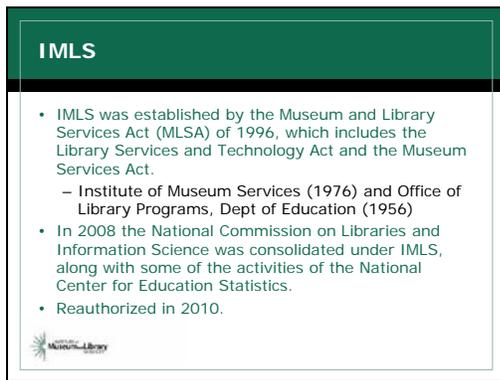
Printout of Reviewer 101 LB21 Web Presentation



Welcome to Reviewer 101 from the Institute of Museum and Library Services. This web presentation is designed to help grant reviewers for the Laura Bush 21st Century Librarian Program prepare to serve on a review panel.



Reviewer 101 is made up of eight sections, this overview followed by ones on ethics, process, evaluation, comments to applicants, the online review system, panel day at IMLS, and administrative details such as travel and honorarium.



Before you serve on an IMLS review panel it may be helpful to have some background about the agency. IMLS was established by the Museum and Library Services Act (MLSA) of 1996, which includes the Library Services and Technology Act and the Museum Services Act. It incorporated the Institute of Museum Services, founded in 1976 and the Office of Library Programs in the Department of Education, created in 1956. Then in 2008 the National Commission on Libraries and Information Science was consolidated under IMLS, along with some of the activities of the National Center for Education Statistics. IMLS was reauthorized in 2010.

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IMLS Mission

- Primary source of federal support for the nation's **123,000 libraries** and **17,500 museums**.
- Create strong libraries and museums that connect people to information and ideas.
- Help build the capacity of libraries and museums through **grant-making, convenings, research and publications**



IMLS' mission is to serve as the primary source of federal support for the nation's 123,000 libraries and 17,500 museums; to create strong libraries and museums that connect people to information and ideas; and to help build the capacity of libraries and museums through grant-making, convenings, research and publications.

Purpose of Laura Bush 21st Century Librarian Program (LB21)

- Recruit and educate next generation of librarians;
- Support continuing education;
- Develop LIS faculty and library leaders;
- Build institutional capacity in LIS graduate schools;
- Support research on the library profession;
- Support research by early career tenure-track faculty in LIS graduate schools;
- Support projects to attract college students to consider careers in libraries.



The Laura Bush 21st Century Librarian Program (commonly referred to as LB21) has seven primary purposes: to recruit and educate the next generation of librarians; to support continuing education; to develop LIS faculty and library leaders; to build institutional capacity in LIS graduate schools; to support research on the library profession; to support research by early career tenure-track faculty in LIS graduate schools; and to support projects to attract college students to consider careers in libraries.

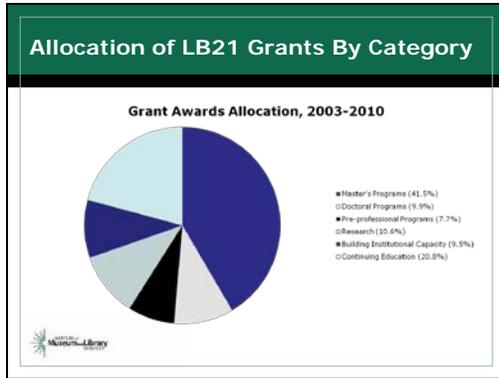
LB21 Funding Categories

- Doctoral Programs
- Master's Level Programs
- Research
 - Early Career Development
- Pre-Professional Programs
- Programs to Build Institutional Capacity
- Continuing Education
- Collaborative Planning – Any category
 - Level I (one year, up to \$50,000)
 - Level II (one year, up to \$100,000)



The LB21 program has six funding categories: Doctoral Programs; Master's Level Programs; Research, which includes Early Career Development; Pre- Professional Programs; Programs to Build Institutional Capacity; and Continuing Education. These grants are for 1 to 3 years, except for Doctoral Program grants, which can be for as long as four years. Available for any one of the above categories are one-year collaborative planning grants. The Level I planning grant is for up to \$50,000 and the Level II grant up to \$100,000. Level I grants support a variety of activities, for example, creation of a needs assessment or literature review. Level II grants support meetings of experts to address issues of national importance to the profession and require a white paper.

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From 2003 to 2010 LB21 funds have been distributed as displayed in this pie chart: Master's Programs is the largest section with 41.5%, then Continuing Education with 20.8%, Research with 10.6%, Doctoral Programs with 9.9%, Building Institutional Capacity with 9.5%, and Pre-professional Programs with 7.7%.

Competitive Review Process

- Applications are evaluated by peers
- Evaluations are based on the application's strength in proving that the applicant:
 - Meets evaluation criteria in the *Guidelines*; and
 - Addresses one of the funding categories
- Roughly 1/3 of applications funded
- Reviewer evaluations are critical
- You were selected because of your expertise

We appreciate your willingness to serve!

The program has a competitive review process with applications being evaluated by peers. Evaluations are based on the application's strength in proving that the applicant: meets the evaluation criteria in the *Guidelines*; and addresses one of the funding categories. Roughly one-third of applications are funded. Reviewer evaluations are a critical part of the process. You were selected because of your expertise. We appreciate your willingness to serve!

Support Materials for Reviewers

<http://imls.gov/reviewers/reviewers.shtm>

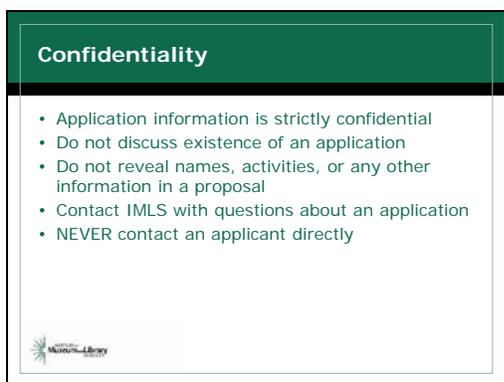
This slide shows a screen shot of the IMLS Web site page for grant reviewers and gives the URL below. The Grant Reviewer tab is the second one from the left when you click on it the second option in the left column shows the link for Reviewer Resources.



Reviewer 101: section two, Ethics.



The integrity of the review process at IMLS is sacrosanct. Applicants make a huge commitment of time in preparing their grant proposals, often revealing intellectual property that is central to their professional careers. It is critical that the review process protect their ideas. Fair and candid reviews are essential with panelists sharing viewpoints off the record. Reviewers need to demonstrate an openness to others' ideas. Ultimately, the expert advice offered through the peer review process is valuable to all applicants.



Application information is strictly confidential. Panelists should not discuss the existence of an application, let alone reveal names, activities, or any other information in a proposal. If you have questions about an application please contact IMLS. NEVER contact an applicant directly.

Confidentiality & the Review Process

- Do not leave application materials where others may see, whether at home or the office
- While in DC and outside of panel room, do not discuss applications or the review process, even with other reviewers
- Leave all printed materials for shredding with IMLS
- Delete all digital copies from email, hard drives and removable storage



Confidentiality is important to remember at all stages of the review process. Do not leave application materials where others may see them, whether at home or the office. While you are in DC and outside of the panel room, do not discuss applications or the review process, even with other reviewers. Leave all printed materials for shredding with IMLS and delete all digital copies from your email, hard drives and removable storage.

Confidentiality and Social Media

- Do not use Twitter or other social media during review sessions
 - Successive Tweets can be very revealing
 - Facebook updates may breach confidentiality
- Preserve the anonymity of the review process:
 - Refrain from posting that you are an IMLS reviewer
 - Avoid saying that you are at an IMLS meeting
- Geolocation applications should not be used



Confidentiality can be especially challenging at a time when many reviewers regularly use social media. Please do not use Twitter or other social media during review sessions. When viewed together successive Tweets can be very revealing, just as Facebook updates may breach confidentiality. You can preserve the anonymity of the review process by refraining from posting that you are an IMLS reviewer; avoiding saying that you are at an IMLS meeting. Also remember that geolocation applications such as Foursquare should not be used.

Conflict of Interest

- Read the Conflict of Interest statement carefully
- Look through your list of assigned applications
- Assess each application individually
- Potential conflicts of interest might relate to:
 - financial interests
 - personal or professional relationships
 - employment
- Bottom line - you cannot review it objectively
- Contact IMLS immediately if you have a conflict



Please take the time to read the Conflict of Interest statement carefully. Then look through your list of assigned applications, assessing each application individually. Potential conflicts of interest might relate to: financial interests; personal or professional relationships; or employment. The bottom line in judging whether a conflict of interest exists is if you don't think you can review an application objectively. Please contact IMLS immediately if you have a conflict.

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Conflict of Interest Statement

As a reviewer or panelist for the Institute of Museum and Library Services, you may receive a grant application for review that could present a conflict of interest. Such a conflict could arise if you are involved with the applicant institution, or in the project described in the application, as a paid consultant or through other financial involvement. The same restrictions apply if your spouse or minor child is involved with the applicant institution or if the application is presented on behalf of an institution with which you, your spouse or minor child is negotiating future employment.



The following is the Conflict of Interest statement: As a reviewer or panelist for the Institute of Museum and Library Services, you may receive a grant application for review that could present a conflict of interest. Such a conflict could arise if you are involved with the applicant institution, or in the project described in the application, as a paid consultant or through other financial involvement. The same restrictions apply if your spouse or minor child is involved with the applicant institution or if the application is presented on behalf of an institution with which you, your spouse or minor child is negotiating future employment.

Conflicts and Relationships

- Alumni
- Previous employer
- Colleague

- Objectivity
- Mature judgment

- How recent was the connection?
- How cordial was the relationship?



We are often asked about potential conflicts of interest and personal relationships. This may be because a reviewer attended or was employed by an applicant institution. Or it may be because a reviewer has or had a relationship with a colleague involved with an application, whether as a principal investigator or a project staff member. Reviewers are expected to use objectivity and mature judgment. Ask yourselves how recent was the connection and how cordial was the relationship?

Conflict of Interest: E-review

- DO NOT click on the Conflicts box (known system problem)
- Contact a program officer immediately



Review Group	Project Title	Applicant	Applicant Type	Applicant Status	Applicant Address
LD-09-10-0048	Learning Centers: A Collaborative to...	California Academy of Science	Institution	Initials	619188
LD-09-10-0089	Development of Digital Collection Portal	Portland Community College	Institution	Initials	619188
LD-09-10-0097	The Hidden Renaissance	Public Interest	Institution	Initials	619188
LD-09-10-0098	Herbert: An Endangered Washington State	Institution	Initials	619188	

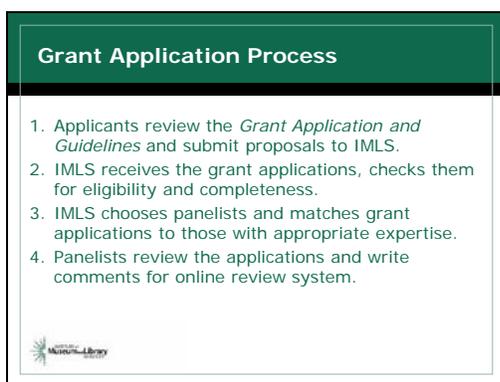


If you have a conflict of interest DO NOT put a check in the Conflicts dialog box in the IMLS Online Reviewer System. This will cause a known system problem. Instead contact a program officer immediately.

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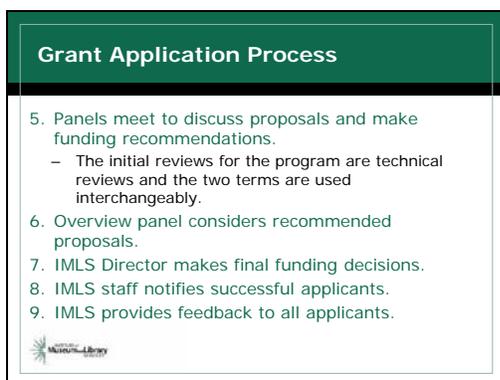


Reviewer 101: section three, Process.



The grant application process consists of nine basic steps:

- Applicants review the *Grant Application and Guidelines* and submit proposals to IMLS.
- IMLS receives the grant applications, checks them for eligibility and completeness.
- IMLS chooses panelists and matches grant applications to those with appropriate expertise.
- Panelists review the applications and write comments for online review system.



- Panels meet to discuss proposals and make funding recommendations.
 - The initial reviews for the program are technical reviews and the two terms are used interchangeably.
- Overview panel considers recommended proposals.
- IMLS Director makes final funding decisions.
- IMLS staff notifies successful applicants.
- IMLS provides feedback to all applicants.

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Initial Technical Review Panels

- 10-12 panelists, each reading ~10-15 proposals
- Before coming to DC
 - 5 panelists read each proposal
 - Write comments for online review system
- In DC
 - Panelists discuss merits of each proposal
 - Then score proposals using 5-point scale
- Reviewers do not have to reach consensus
- Final scores and feedback/comments are recorded
- “Potentially fundable” proposals to Overview Panel



The IMLS review process begins with an initial technical review panel made up of 10-12 panelists, each reading approximately 10-15 proposals. Before coming to DC, 5 panelists read each proposal and write comments in the online review system. Once in DC, panelists meet and discuss the merits of each proposal and then score proposals using a 5-point scale. Reviewers do not have to reach consensus. Final scores, feedback and comments are recorded. “Potentially fundable” proposals are then sent on to the Overview Panel.

Overview Panel

- Considers all “potentially fundable” proposals from multiple initial panels
- 8-10 senior panelists, each reading 8-10 proposals
- Panelists usually have served 3 years on initial panels
- Before coming to DC
 - 3 panelists read each proposal
 - Write comments for online review system



The Overview Panel considers all “potentially fundable” proposals from multiple initial panels. 8-10 senior panelists, each reading 8-10 proposals. Overview panelists usually have served 3 years on initial panels. Before coming to DC 3 panelists read each proposal and write comments in the online review system.

Overview Panel

- In DC
 - Panelists discuss merits of each proposal & broader consideration of needs of libraries and archives
 - Then score proposals as either “high priority”, “low priority”, or “do not fund”
- Reviewers do not have to reach consensus
- Final scores and feedback/comments are recorded, later sent to applicants
- “Broader consideration of needs”
 - Current practice
 - Emerging trends
 - Models
 - Standards



Once in DC Overview panelists discuss the merits of each proposal as well as a broader consideration of the needs of libraries and archives. They then score proposals as either “high priority”, “low priority”, or “do not fund.” Reviewers do not have to reach consensus. Final scores, feedback and comments are recorded and later sent to applicants. The “broader consideration of needs” generally means things such as current practice, emerging trends, models, and standards.

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IMLS Director Decision

- Director has final responsibility for all award decisions
 - Based on level 1 and level 2 reviews, program officers prepare recommendations for IMLS Director
 - Panel recommendations strongly influence Director's decisions
 - Director and program officers discuss recommendations, as well as other factors that might influence funding decisions (e.g., current agency areas of emphasis, aspects of proposals not represented in the proposal narrative, prior funding history of applicants)



The IMLS Director has final responsibility for all award decisions. Based on level 1 and level 2 reviews, program officers prepare recommendations for the IMLS Director. Panel recommendations strongly influence Director's decisions. The Director and program officers discuss recommendations, as well as other factors that might influence funding decisions (for example, current agency areas of emphasis, aspects of proposals not represented in the proposal narrative, prior funding history of applicants).

Reviewer 101

Creating a Nation of Learners



Laura Bush 21st Century Librarian Program

Evaluation

Reviewer 101: section four, Evaluation.

Primary Evaluation Activities

1. Check materials for completeness and conflicts
2. Read the *Application and Guidelines* and the *Panelist Handbook*
3. Initial read-through of applications
4. Second read-through with writing of comments
5. Review comments and scores
6. Prepare brief outline for a few assigned proposals
 - Each panelist leads 3-4 discussions
7. Input comments and scores in online review system before travelling to panel meeting



The primary activities involved in evaluating submissions are:

- Checking materials for completeness and conflicts
- Reading the *Application and Guidelines* and the *Panelist Handbook*
- An initial read-through of all assigned applications
- A second read-through with writing of comments
- Reviewing comments and scores
- Preparing brief outlines for the proposals where you will lead the discussion
- Each panelist leads 3-4 discussions
- Inputting comments and scores in the online review system before travelling to the panel meeting in Washington, DC.

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Time Commitment

- Four weeks from mat'ls receipt to panel meeting
- You will be asked to read 10-15 proposals
- Time needed to evaluate each application
 - Experienced reviewers: 2-3 hours
 - First-time reviewers: 3-4 hours
- First few applications take longer to evaluate for all reviewers with later proposals going faster
 - Advisable to revisit those after all are reviewed
- Time commitment prior to meeting: 40-60 hours



It's important to understand the time commitment expected of IMLS reviewers. From the time you receive the application materials to the panel meeting is only four weeks. You will be asked to read between 10 to 15 proposals. In terms of the time needed to evaluate each application, IMLS estimates that experienced reviewers will need 2 to 3 hours and first-time reviewers, 3 to 4. The first few applications typically take longer to evaluate for all reviewers with later proposals going faster. It's advisable to revisit those earlier applications after everything has been reviewed. The overall time commitment prior to meeting is in the range of 40 to 60 hours.

Initial Checks

Completeness

- Check application materials as soon as you receive them
 - Is all required information included?
 - Are all applications complete?

Conflicts of Interest

- Read through list of applications for conflicts
- Notify IMLS immediately if there are any problems



There are two initial checks you need to do as soon as you receive your application materials: Completeness and Conflicts of Interest. Check the application materials to make sure that all the required information is included and that all the applications are complete. Read through the list of applications to verify that there are no conflicts of interest. Notify IMLS immediately if there are any problems.

Evaluation of Applications

- Familiarity with *Guidelines* is critical for reviewers
- Express your professional judgment by:
 - Assessing if the proposal deals with priorities
 - Writing comments for each criterion
- Qualities of a Good Proposal
 - Demonstrates impact as defined in *Guidelines*
 - Successfully addresses each criterion
 - Addresses goals for the appropriate category



When evaluating applications it is critical for reviewers to be familiar with the *Guidelines*. IMLS asks you to express your professional judgment of each proposal by assessing if the proposal deals with priorities as listed in the program guidelines and by writing comments for each criterion. Your judgment should reflect how well you think the information provided in each proposal meets the goals and stated criteria of the specific priority.

Qualities of a good proposal are that it demonstrates impact as defined in the *Guidelines*, it successfully addresses each criterion, and it addresses the goals for the appropriate category.

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LB21 Funding Categories

- Doctoral Programs (RE-02)
- Master's Level Programs (RE-01)
- Research (RE-04)
 - Including Early Career Development
- Pre-Professional Programs (RE-03)
- Programs to Build Institutional Capacity (RE-05)
- Continuing Education (RE-06)

- Collaborative Planning Grants (for any category)
 - Level I and Level II



LB21 has the following six funding categories and codes: Doctoral Programs (RE-02); Master's Level Programs (RE-01); Research (RE-04), which includes Early Career Development; Pre-Professional Programs (RE-03); Programs to Build Institutional Capacity (RE-05); and Continuing Education (RE-06). You also can apply for Level I and Level II Collaborative Planning Grants for any category.

Two Scoring Systems in Use

- Initial technical panels
 - 5-point scoring system
 - Focus on applications
- Overview panel
 - 4-point scoring system
 - Reviews best advanced by all technical panels
 - Focuses on applications & entire program
 - Projects represent appropriate mix of library types and activities
 - Overall needs of libraries and archives in the U.S.



Two different scoring systems are used in the review process, one for the initial technical panels and the other for the Overview panel. Technical panels use a 5-point scoring system and focus on the merits of each of the applications. The Overview panel uses a 4-point scoring system as it reviews the best applications advanced by all technical panels. It focuses on both the applications & the entire program, recommending projects that represent an appropriate mix of library types and activities and respond to the overall needs of libraries and archives in U.S.

Assigning Scores: Technical

5=Excellent
– For the highest quality applications

4=Very Good
– For very strong applications when minor requested changes easily can be made within one week

3=Good
– For good applications when more significant requested changes can be made within one week
Note: IMLS discourages the use of 3s because the tight timeframe may not be realistic for the necessary changes.



Technical panels use a 5-point scale in assigning scores. 5 equals excellent and is used for the highest quality applications that provide excellent support for each of the evaluation criteria through the proposed activities. These applications strongly demonstrate the potential for strategic impact. 4 equals very good and is used for very strong applications when requested changes are minor and easily can be made within one week. Strategic impact is present but not exemplary. 3 equals good and is used for applications when there are more significant requested changes but ones that can be made within one week. Note: IMLS discourages the use of 3s because the tight timeframe may not be realistic for the necessary changes.

Assigning Scores: Technical

2=Some Merit

- For projects that can be revised and resubmitted by this applicant next year. Submissions are based on good ideas or addresses important issues

1=Do Not Fund

- For projects that you do not want to see brought back. Proposals have major flaws that make them unfundable without major revisions or they have serious conceptual flaws



The final two scores are used for applications that are not to be considered for funding in the current grant cycle. 2 equals some merit and indicates that submissions are based on good ideas or address important issues but are not ready to receive funding. Taking into consideration the recommendations and feedback from the review panel, these applications should be revised and resubmitted next year. 1 equals do not fund and is used for projects that you do not want to see brought back to this program. Proposals have major flaws that make them unfundable without major revisions or they have serious conceptual flaws. It is possible that they may be fundable in another IMLS grant category.

Assigning Scores: Overview

• H=High priority

- Potential for great, sustained, national impact that can be funded with no changes

• M=Medium priority

- Potential for great, sustained, national impact that need only minor changes

• L=Low priority

- May be strong but do not meet program needs or do not have potential for a broad impact

• DNF=Do Not Fund

- Do not align with program needs; limited impact



The Overview panel uses a 4-point scale in assigning scores. H equals high priority and is used for projects with the potential for great, sustained, national impact that can be funded with no changes. M equals medium priority and is used for projects with the potential for great, sustained, national impact that can be funded with only minor changes. L equals low priority and is used for projects that may be strong but do not meet the needs outlined in the program guidelines or that do not have the potential for a broad impact. DNF equals do not fund and is used for projects that do not align with the needs outlined in the program guidelines and are seen as having only a limited impact.

Evaluation Criteria

- Needs Assessment
- Impact
- Diversity
- Project Design and Evaluation Plan
- Project Resources: Budget, Personnel and Management Plan
- Communication Plan
- Sustainability Plan



The evaluation criteria used in this program are as follows: needs assessment; impact; diversity; project design and evaluation plan; project resources: budget, personnel and management plan; communication plan; and sustainability plan.

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Needs Assessment

- Does the literature review include relevant research and/or projects?
- Does the needs assessment clearly articulate the project audience and its needs?
- Do project activities and goals directly address the needs of the identified audience?
- Is the rationale for this research fully explained?



When evaluating the needs assessment, you should ask: Does the literature review include relevant research and/or projects?; Does the needs assessment clearly articulate the project audience and its needs?; Do project activities and goals directly address the needs of the identified audience?; and is the rationale for this research fully explained?

Impact

- Does the project increase the number of qualified professionals for employment as librarians?
- Does it build greater skills and abilities in the library and archives workforce?
- Will it contribute to results or products that benefit multiple institutions and diverse constituencies?
- Will project outcomes meet library service needs not only in the communities served but also be generalizable to libraries of similar size and type?
- Will this project transform practice? Innovative approaches should be given high consideration.



When evaluating the impact, ask: Does the project increase the number of qualified professionals for employment as librarians?; Does it build greater skills and abilities in the library and archives workforce?; Will it contribute to results or products that benefit multiple institutions and diverse constituencies?; Will project outcomes meet library service needs not only in the communities served but also be generalizable to libraries of similar size and type?; and will this project transform practice? Innovative approaches should be given high consideration.

Diversity

- Does the proposal identify the diversity of communities served?
- Does it address the library service needs of those communities, particularly the needs of traditionally underserved groups and/or communities?
- If a scholarship program, is there a convincing recruitment strategy?



When evaluating the diversity, ask: Does the proposal identify the diversity of communities served?; Does it address the library service needs of those communities, particularly the needs of traditionally underserved groups and/or communities?; and if the proposal is for a scholarship program, is there a convincing recruitment strategy?

Project Design and Evaluation Plan

- Does the design fit the funding category?
- Are the methodology and design appropriate to the scope of the project?
- Does the proposal clearly articulate research questions and adequately address timeline & personnel?
- Does it include details of sampling logic (size, scope), data collection and analysis methodologies?
- Does the evaluation plan explain how the results are likely to be valid, reliable or generalizable?
- Does it describe how study results will be assessed?



When evaluating the project design and the evaluation plan, ask: Does the design fit the funding category?; Are the methodology and design appropriate to the scope of the project?; Does the proposal clearly articulate research questions and adequately address timeline & personnel?; Does it include details of sampling logic (size, scope), data collection and analysis methodologies?; Does the evaluation plan explain how the results are likely to be valid, reliable or generalizable?; and Does it describe how study results will be assessed?

Project Resources

- Are resources appropriate to meet the project goals?
 - Examine the budget justification and narrative
 - Do activities in budget match those in narrative?
 - Do expenses seem reasonable?
- Do personnel have appropriate experience and will they commit adequate time to the project?
- If the project includes a partnership, is there evidence that all partners are active contributors to and beneficiaries of the partnership activities?



When evaluating the project resources, ask: Are resources appropriate to meet the project goals and examine the budget justification and narrative to see if activities in the budget match those in the narrative and if the expenses seem reasonable?; Do personnel have appropriate experience and will they commit adequate time to the project?; and if the project includes a partnership, is there evidence that all partners are active contributors to and beneficiaries of the partnership activities?

Communication Plan

- Will the results, products, models, findings, processes, and benefits of this project be communicated effectively to the library field?
- Will they be communicated effectively to other professional organizations and stakeholders?
- Will the communities described in the Needs Assessment section as benefiting from the project be informed of activities on an ongoing basis?



When evaluating the communication plan, ask: Will the results, products, models, findings, processes, and benefits of this project be communicated effectively to the library field?; Will they be communicated effectively to other professional organizations and stakeholders?; and will the communities described in the Needs Assessment section as benefiting from the project be informed of activities on an ongoing basis?

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Sustainability Plan

- Do project benefits extend beyond grant period?
- For projects involving distance education, do project plans address issues of copyright and use restriction on the course and course content during and after the grant period?
- Are there plans for preservation and maintenance of course and course content during and after the expiration of the grant period?
- For research projects, do plans to inform future research include avenues other than publication?



When evaluating the sustainability plan, ask: Do project benefits extend beyond the grant period?; For projects involving distance education, do project plans address issues of copyright and use restriction on the course and course content during and after the grant period?; Are there plans for the preservation and maintenance of course and course content during and after the expiration of the grant period?; and for research projects, do plans to inform future research include avenues other than publication?

Reviewer 101

Creating a Nation of Learners



Laura Bush 21st Century Librarian Program

Comments to Applicants

Reviewer 101: section five, Comments to Applicants.

Prior to the Panel Meeting

- Write comments for each application assigned
- After completing comments, review each one, write a brief description of its strengths and weaknesses, then give your recommendation
- Comments are sent to both successful and unsuccessful applicants
- You are expected to give input and/or lead discussions about these proposals
- Create a brief outline of applications for which you will lead discussion



Prior to the panel meeting, IMLS expects reviewers to write comments for each application assigned. After completing comments, review each application and write a brief description of its strengths and weaknesses, then give your recommendation. Comments are sent to both successful and unsuccessful applicants. You are expected to give input and/or lead discussions about these proposals. Create a brief outline of the applications for which you will lead discussion.

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Panel Discussions

- Discussions are integral to the review process
- They culminate in funding recommendations
- Reviewers are expert in some areas, not in others
- Panelists need to be collegial and flexible as they share their opinions



Panel discussions are integral to the review process and they culminate in funding recommendations. Reviewers are expert in some areas, not in others. Panelists need to be collegial and flexible as they share their opinions.

Characteristics of Good Comments

- Presented in a constructive manner
- Concise, specific, easy to read and understand
- Specific to the individual applicant
- Reflect the professionalism of the reviewer
- Correlate with the score
- Acknowledge the resources of the institution
- Reflect the application's strengths and identify areas for improvement
- Directed to applicants for their own use



Characteristics of good comments are: They are presented in a constructive manner; they are concise, specific, easy to read and understand; they are specific to the individual applicant. Good comments reflect the professionalism of the reviewer and correlate with the score. They acknowledge the resources of the institution and reflect the application's strengths and identify areas for improvement. Finally, they are directed to applicants for their own use.

Poor Comments

- Are vague, irrelevant, insensitive or unclear
- To avoid making poor comments, DO NOT:
 - Penalize applicant because you think the institution doesn't need the money
 - Make derogatory remarks instead of suggestions
 - Question an applicant's honesty or integrity
 - Offer or ask for irrelevant or extraneous information



Comments that are considered poor are vague, irrelevant, insensitive or unclear. These comments actually hinder the evaluation process rather than help it. To avoid making poor comments, DO NOT: Penalize the applicant because you think the institution doesn't need the money – remember, any eligible institution may apply for and receive funds, regardless of need; Make derogatory remarks instead of suggestions; Question an applicant's honesty or integrity. You may question the accuracy of information provided by the applicant and if you are unsure how to raise your question, please contact IMLS. Do not offer or ask for irrelevant or extraneous information – your comments should concern only the information IMLS requests of all applicants.

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Gaining Access

- Once you are confirmed as a reviewer, IMLS will send you an email with the link to the system
- Log in using the e-mail address on file with IMLS
- New reviewers use the password: **password**
 - The first time you log in you will be prompted to create a new password and enter a secret question and answer
- When you log in the system displays four messages about security, privacy, confidentiality, and conflict of interest.
- Review these and press OK to continue.



Once you are confirmed as a reviewer, IMLS will send you an email with the link to the system and instructions for gaining access. Log in using the e-mail address on file with IMLS. If you are a new reviewer use the password: password. The first time you log in you will be prompted to create a new password and enter a secret question and answer. When you log in the system displays four messages about security, privacy, confidentiality, and conflict of interest. Review these and press OK to continue.

Viewing the List of Applications

- Click on Review Groups in the left-hand margin
- The code for your review panel is displayed along with the number of applications and status
- Click on View to list your assigned applications



Online Reviewer System

[LOGIN] [REVIEW GROUPS]

Review Group Code	No. of Applications	Review Status	View	Print
10100	10	Incomplete	View	Print



Once you have logged in you can begin using the online review system. Click on Review Groups in the left-hand margin to display the code of your review panel along with the number of applications and the review status. Click on View on the right-hand side of the screen to list your assigned applications.

Viewing an Application

- Click on Details to retrieve an application



Conflict of Interests Statement

IMLS Online Reviewer System requires each reviewer to submit a conflict of interests statement prior to reviewing the applications. The conflict of interests statement will be submitted only once.

Please review the details of each application and determine if there are any conflicts of interests. Click on the 'Details' button upon each application.

If there are no conflicts of interests, leave all check boxes unchecked and 'Conflict Comments' text box blank. The reviewer will return to the individual review effort going through the statement again.

If there are conflicts of interest for any of the applications, please contact the IMLS staff to discuss your conflict. Once the conflict has been resolved, you may return to this website to continue your review. If you will reach a conflict of interest, an email will be sent to the administrator program officer to have further advice.

Return to: 10100-2010-01-01

App Number	Application Title	Applicant Name	Application Review Status	Conflict	Details	Print
10100-11-000	Conservation and Preservation (10100-11-000)	Art Museum	Incomplete	<input type="checkbox"/>	Details	Print
10100-11-000	Restoration of 10100-11-000	Museum	Incomplete	<input type="checkbox"/>	Details	Print
10100-11-000	10100-11-000	Museum	Incomplete	<input type="checkbox"/>	Details	Print



The initial Application Review Status of each application should be Incomplete. Click on Details to retrieve an individual application.

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Conflicts of Interest

- All reviewers should read the full Conflict of Interest Statement as discussed under ethics
- Before you can begin to review any application you must complete a Conflict of Interest Statement

All reviewers should read the full Conflict of Interest Statement as discussed in the ethics section. Before you can begin to review any application you must complete a Conflict of Interest Statement.

Conflicts of Interest -- No

- If you do not have a conflict of interest with any application press Submit Conflict of Interests Statement at the bottom of the screen
- Click on OK in the pop-up window confirming that you do not have any conflicts of interest

If you do not have a conflict of interest with any application press Submit Conflict of Interests Statement at the bottom of the screen. Then click on OK in the pop-up window confirming that you do not have any conflicts of interest.

Conflicts of Interest -- Yes

- If you do have a conflict of interest DO NOT click on the Conflicts box (known system problem)
- Contact a program officer immediately

If you do have a conflict of interest DO NOT click on the Conflicts box. This is a known system problem. Instead contact a program officer immediately.

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Reviewing an Application

- System displays the list of applications
- Click on Review to begin the review process



Application ID	Application Name	Application Status	Review
101-10-1001	Community and Recreation	Application Pending Review	Review
101-10-1002	Marketing of 2010 Collection	Application Pending Review	Review
101-10-1003	Physical Access	Application Pending Review	Review

University of Minnesota - Library

The online review system displays the list of applications you have been assigned. Click on Review to begin the review process.

Reviewing an Application

- Select review criteria and write comment
- Click on Save before moving to next criterion
- Score complete application after review of all criteria



University of Minnesota - Library

Select one of the review criteria and write comments. Be sure to click on Save before moving to the next criterion. Score the complete application after a review of all criteria.

Reviewing an Application

- Advisable to write comments in a word processor then cut and paste into the online review system
- Reviewers must submit comments and a score for each of the application review criteria
- Click Save & Close when you have completed an application
- Use the left-hand menu to move between evaluation criteria or to the application overview
- Application overview is where you comment on the application as a whole

University of Minnesota - Library

IMLS advises you to write comments in a word processor and then cut and paste them into the online review system. Reviewers must submit comments and a score for each of the application review criteria. Click Save & Close when you have completed an application. Use the left-hand menu to move between evaluation criteria or to the application overview. The application overview section is where you comment on the application as a whole.

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Completing Online Review

- You can reenter the review system and edit your comments and scores as often as needed
- Once all applications have been reviewed the Application Review Status will read Complete
- Print each review for your records and retain for 60 days
- When you are satisfied with your reviews, click **I Am Ready to Submit This Review to IMLS** at the bottom of the screen
- Once submitted reviews cannot be modified



You can reenter the review system and edit your comments and scores as often as needed up until final submission. Once all the applications have been reviewed the Application Review Status will read Complete. Print each review for your records and retain the printouts for 60 days after submission. When you are satisfied with your reviews, click **I Am Ready to Submit This Review to IMLS** at the bottom of the screen. Remember that once your reviews have been submitted they cannot be modified.

Questions?

- Contact program officers with any questions about the review process



Contact program officers with any questions about the review process.

Reviewer 101

Creating a Nation of Learners



Laura Bush 21st Century Librarian Program

Panel Day at IMLS

Reviewer 101: section seven, Panel Day at IMLS.

Printout of Reviewer 101 LB21 Web Presentation

Goals of Panel Day

- Have an open and productive discussion
 - Share thoughts freely and respectfully
 - Educate others on areas where you have expertise
 - Listen and learn
- Make recommendations about applications that should advance to the Overview panel
- Make sure you understand what a valuable contribution you are making to the profession



The main goals IMLS has for panel day are to have an open and productive discussion where panelists share their thoughts freely and respectfully, educating others on areas where they have expertise, listening and learning when they don't, and in the end making recommendations about applications that should advance to the Overview panel. Another goal that we cannot repeat often enough is to make sure you understand what a valuable contribution you are making to IMLS and to the profession.

IMLS Roles

- Senior IMLS staff
 - Observe meeting
 - Share wisdom and perspective as needed
- Program Officers
 - Moderate discussion
 - Ask clarifying questions
- Program Specialists
 - Record major criticisms and suggestions
 - Document scores



IMLS staff play different roles during the panel meeting. Senior IMLS staff are there to welcome reviewers, observe the meeting, and share their wisdom and perspective as needed. Program Officers moderate the discussion and ask clarifying questions. Program Specialists record major criticisms and suggestions, and document scores.

Panelist Roles

- Discussion leaders
 - Give brief synopsis of each proposal (3 minutes)
 - Present preliminary score
 - Offer reasons to support recommendation
 - Take notes on others' comments
- Readers
 - Give preliminary score
 - Make points not previously mentioned
- Non-reader reviewers
 - Listen and engage in discussion



Panelists perform different roles throughout the meeting. Discussion leaders give a brief synopsis of each proposal (roughly 3 minutes each), present their preliminary scores, offer reasons to support that recommendation, and take notes on others' comments. Readers give their preliminary scores and make points not previously mentioned. Non-reader reviewers listen and engage in the discussion.

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Scoring Notes

- Initial scores relate to overall merit of proposal
 - Not the average of the review criteria
- No consensus is required
- Scores often change after discussions
- Individual ratings are shared with applicants



The following are some general notes about scoring that may be of interest to new reviewers. Initial scores relate to the overall merit of the proposal and are not the average of the review criteria. No consensus is required among readers of a proposal. It is very common for panelists to change their initial scores after discussions. Individual ratings and comments are shared with applicants.

Logistics

- Lunch is on your own
- Breaks are roughly every 90 minutes
- Wireless access is available in the panel room
- During recusals panelists wait in lounge outside



It may be helpful for you to know about basic logistics as you prepare for panel day. Lunch is on your own; there is a wide range of eating options near the IMLS office. Breaks are roughly every 90 minutes. Wireless access is available in the panel room. During recusals reviewers wait in the lounge outside the panel room.

Reviewer 101

Creating a Nation of Learners



Laura Bush 21st Century Librarian Program

Administrative Details

Reviewer 101: section eight, Administrative Details.

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Travel to and from IMLS

- IMLS makes all air and train travel reservations
 - Tickets charged directly to IMLS
 - Tickets are refundable and exchangeable
 - Please avoid making your own reservations
 - IMLS cannot reimburse you if cancelled
- IMLS will send electronic itinerary for approval
- Please review IMMEDIATELY and confirm
- If driving note on Travel Request Form
 - Mileage will be reimbursed at prevailing govt rate
 - Parking fees will be reimbursed after the panel



IMLS makes all air and train travel reservations to and from the panel meeting. Tickets are charged directly to IMLS and are refundable and exchangeable in case the panel ends early. Please avoid making your own reservations because IMLS cannot reimburse you if you need to cancel. When booking your travel IMLS will send you an electronic itinerary for approval. Please review this IMMEDIATELY and confirm the reservations or request changes. If you are driving to the panel meeting please note that on your Travel Request Form. Mileage will be reimbursed at the prevailing government rate. Parking fees will be reimbursed after the panel.

Timing and Travel

- Panels typically run until 5:00 pm
- IMLS does not book return flights until 6:30 pm or later on the day the panel concludes
- If no return flights available that evening IMLS will provide one additional hotel night



Panels typically run until 5:00 pm so IMLS does not book return flights until 6:30 pm or later on the day the panel concludes. If there are no return flights available that evening then IMLS will provide you with one additional hotel night.

Lodging

- IMLS makes all hotel reservations
 - Cost of rooms charged directly to IMLS
 - You will need to present credit card for incidentals
 - Reviewers stay in hotel within walking distance
 - To extend visit at your own cost inform IMLS asap
 - IMLS will try to get govt rate (no guarantee)
- Those living in DC or suburbs
 - Can only be reimbursed for parking
 - IMLS cannot provide lodging or per diem
- Hotel confirmation and directions will be sent about a week before the panel convenes



IMLS makes all hotel reservations with the cost of rooms being charged directly to IMLS. However, you will need to present your credit card to cover incidentals. Reviewers stay in a hotel within walking distance of IMLS. If you want to extend your visit at your own cost please inform IMLS as soon as possible. IMLS staff will try to get the government rate for those nights although there is no guarantee. Due to federal regulations, IMLS cannot provide lodging or per diem for those living in DC or the surrounding suburbs, only parking fees. Hotel confirmation and directions will be sent about a week before the panel convenes.

Reimbursement

- IMLS staff meets with you during the panel to take care of reimbursement
- No need to submit receipts for meals
 - \$53.25 allowance for each travel day
 - \$71 allowance for a full day in DC
- Receipts needed for
 - Ground transportation
 - Parking
 - Checked baggage fee for one bag
- Reimbursements may take up to 30 days



IMLS staff meets with you during the panel to take care of reimbursement paperwork. There is no need to submit receipts for meals: you have a \$53.25 allowance for each travel day and a \$71 allowance for a full day in DC. Receipts are needed for ground transportation, parking, and a checked baggage fee for one bag. Please be aware that reimbursements may take up to 30 days once your paperwork is received.

Forms

- IMLS staff will send you:
 - Travel Request Form
 - Direct Deposit Enrollment (i.e., ACH) Form
 - If you have traveled at IMLS expense for any reason since January 1, 2010, you do not need to resubmit
- IMLS staff will give you at panel meeting:
 - Checklist of reimbursable expenses
 - Peer Services Agreement (honorarium) form



Before you come to IMLS staff will send you a Travel Request Form and a Direct Deposit Enrollment (i.e., ACH) Form. If you have traveled at IMLS expense for any reason since January 1, 2010, you do not need to resubmit the ACH Form. At the panel meeting IMLS staff will give you a checklist of reimbursable expenses and an Honorarium form.

Dining

- Many options around the IMLS office
- View at the Golden Triangle website
<http://goldentrianglecdc.com/dining>



Filter by Category: [All](#) • [American](#) • [Asian](#) • [Bakery](#) • [Coffee & Juice](#) • [Deli](#) • [Desserts](#) • [Burgers](#) • [Breads](#) • [Breakfast](#) • [Cakes](#) • [Candy](#) • [Casseroles](#) • [Catering](#) • [Coffees](#) • [Deli](#) • [Desserts](#) • [Dinner](#) • [Dishes](#) • [Drinks](#) • [Fast Food](#) • [Finger Food](#) • [Ice Cream](#) • [Italian](#) • [Japanese](#) • [Korean](#) • [Latin American](#) • [Mexican](#) • [Middle Eastern](#) • [Pasta](#) • [Pies](#) • [Sandwiches](#) • [Soups](#) • [Steakhouse](#) • [Vegetarian](#) • [Wine](#)



There are many dining options around the IMLS office that you can view at Golden Triangle website by clicking on this link. There is a searchable database by categories of cuisine.

Printout of Reviewer 101 LB21 Web Presentation

Miscellany

- **Temperature in panel room fluctuates**
 - Be prepared by bringing an extra layer of clothing
- **Accessibility**
 - Important to the agency
 - If you need special accommodations please let IMLS know as soon as possible
- **Safety**
 - Complete emergency details given at meeting
 - Procedures are in place to assure your safety



There are some miscellaneous points that IMLS would like to bring to your attention before you arrive. The temperature in the panel room fluctuates so please be prepared by bringing an extra layer. Accessibility is important to the agency. If you need special accommodations please let IMLS know as soon as possible before the panel meeting. Complete emergency details will be given at the meeting. Procedures are in place to assure your safety.

Reviewer 101

- IMLS is testing its use of web presentations
- Accessibility is a priority
- Same material presented in different formats

- IMLS welcomes your feedback
- Send comments to Mary Alice Ball at: mball@imls.gov



IMLS is testing its use of web presentations such as Reviewer 101. Accessibility is a priority so the agency is presenting the same material in different formats. IMLS welcomes your feedback. Please send comments to Mary Alice Ball at: mball@imls.gov.