



## **Conservation Project Support Grants**

# **2010 Field Reviewer Handbook**

For information call IMLS  
(202) 653-4674 or (202) 653-4635

OR email

[chenry@imls.gov](mailto:chenry@imls.gov)

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**The Conservation  
Project Support  
Program Review  
Process**

Thank you for offering to serve as a Conservation Project Support (CPS) 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 technical information you need. Please use it in tandem with this year's *Conservation Project Support Application and Guidelines* in pdf on your review disk. Even if you have reviewed for CPS in the past, you should review this booklet since we have made some changes to CPS this year.

Conservation Project Support Conservation Project Support (CPS) is an annual, federal grant program that awards applicants up to \$150,000 in matching funds. The program helps museums identify conservation needs and priorities and perform activities to ensure the safekeeping of their living and non-living collections.

Please remember that we usually support any type of conservation project if it meets one of the institution's most urgent conservation needs.

Types of projects eligible for funding include

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

**Goals of the  
Conservation Project  
Support grant  
program**

The purpose of the Conservation Project Support (CPS) program is to help safeguard the collections housed in the nation's museums so that current and future generations can learn from and gain access to the rich artistic, cultural, and scientific heritage represented by these collections. To achieve this purpose, IMLS awards matching grants to help museums identify their conservation needs and priorities and to help them ensure the safekeeping of their collections by implementing sound conservation practices.

IMLS has awarded 3,310 CPS grants since the program's inception in 1984. All types and sizes of museums have benefited from this program. The CPS program is a partnership between IMLS and each grant recipient, working toward the mutual goal of protecting significant aspects of our cultural and scientific heritage.

IMLS has supported a holistic approach to conservation, designing the program to assist museums in developing a logical, institution-wide

approach to caring for their living and nonliving collections. The full range of conservation opportunities supported by this program, from comprehensive collection surveys to environmental improvements to conservation training, and treatment, taken together, can provide a roadmap to guide each institution's collections care.

CPS awards matching grants to help museums identify conservation needs and priorities and perform activities to ensure the safekeeping of all types of collections, including:

- Nonliving
- Natural History/Anthropology
- Living Plants
- Living Animals

Projects fall into one of four general areas: surveys of collections, improvement of collections environment, treatment of collections, and training proposals.

## **Eligible Activities**

### **Allowable Expenses include such items as**

- Project personnel, contract, or in-house staff time necessary for the proper and efficient execution of the project
- Project consultants and their travel
- Staff training in collections care
- Internships/fellowships in conservation
- Repair and stabilization activities that are directly related to the conservation project
- Micro-environments for an object, specimen, or room (e.g., storage)
- Basic environmental monitoring equipment and conservation supplies if these items will be used in conjunction with the project
- Educational materials staff time or other supplies for sharing the impact of the conservation activities
- For living plant collections, mapping software
- For living collections only, those physical improvements that relate directly to the perpetuation of the specimens or species involved in the project
- Staff time spent traveling to conservation facilities or consulting with conservation professionals
- Evaluation to show the extent to which the project has met its goals
- For training, evaluation to show the extent to which intended outcomes have resulted.
- Indirect or overhead costs

All proposed expenses must be justified in the application budget.

## **Ineligible Activities**

### **Unallowable Expenses include such items as**

- inventory or cataloguing of collections
- a project whose goals are primarily aesthetic or educational
- the upgrade or installation of a security or fire suppression system
- the installation or purchase of heating, ventilation, and air conditioning systems (HVAC) for an entire museum building
- construction or major building improvements
- reconstruction or renovation of historic sites and landscapes
- replacement of architectural details for historical accuracy

### **Grant funds may not be used for**

- Acquisition of collections
- Contributions to endowments
- Social activities, ceremonies, or entertainment
- Pre-grant costs

## Program Process

1. Applicants register with Grants.gov and download the grant application guidelines; they complete the application forms and upload forms and attachments to the Grants.gov portal.
2. IMLS receives the applications and checks them for eligibility and completeness.
3. IMLS identifies a pool of available field reviewers. IMLS assigns three museum professionals to evaluate each application.
4. IMLS matches grant applications to field reviewers with appropriate expertise. Because many CPS applications deal with several materials, reviewers who are experts in each of the materials are assigned to read an application.
5. Field reviewers receive the applications, evaluate them, and complete their online reviews.
6. IMLS processes comments and scores, and ranks the applications. This ranking will be used to determine which applications are sent to the review panel. The panel will make final recommendations based on the field review comments as well as their own expertise.
7. CPS review panels meet to provide a second level of review and make final funding recommendations. The review panel will be comprised of conservators, collections managers, museum directors and other professionals who have experience in collections care issues. Panelists are not asked to do detailed technical reviews. IMLS staff and the CPS panelists are relying on you to point out specific strengths and weaknesses of each proposal you evaluate. Panelists meet in Washington, DC after the field review period. Panelists review applications from a broad perspective, identifying applications that best meet IMLS program goals. They also provide insight into issues pertinent to this year's competition as well as provide recommendations on improving the grant program, its application and process.
8. IMLS staff reviews the financial/accounting information and the budget sheets of each potential grantee.
9. IMLS staff members provide a list of applications recommended for funding to the IMLS Director for her approval.
10. IMLS awards Conservation Project Support grants in late April. At that time, IMLS notifies all applicants by mail whether or not they have received an award. With their notification, all applicants receive the reviews that their field reviewers and panelists completed. We also send

notification of the awards to all participating reviewers.

### **How Your Reviews Are Used**

Your scores determine the ranking of applications upon which IMLS determines those going to the sitting panel, and which will not.

For those applications that go to panel review, your reviews will provide the basis for the panel review, directing panelists to the strengths and weaknesses of an application. If a panel-reviewed application is not funded, your review comments and panel comments assist the applicant in revising their application for future submission.

Applicants whose proposals are not ranked highly enough for panel review will only receive your field review comments.

Successful applicants point to good scores and positive comments as a stamp of approval for their project proposals. Museum administrators report that receiving IMLS awards enhance fundraising success with private foundations or state and local sources. Unsuccessful applicants use reviewer comments to improve or revise their applications for resubmission.

### **How You Can Get Feedback On Your Performance**

After we announce awards for the CPS program in April, we invite you to call the IMLS Office of Museum Services to schedule an appointment to discuss your reviews and provide feedback.

We greatly appreciate the tremendous amount of time and effort you committed to being a reviewer. By participating in the peer review process, you make a significant contribution to the Conservation Project Support grant program and are providing an invaluable service to the entire museum community. Thank you!

## Application Review Instructions

### First Steps

This section of the handbook contains detailed information on how to review a Conservation Project Support program application. If you encounter any problems while undertaking your reviews, please contact an IMLS staff person:

Christine Henry  
phone: (202) 653-4674  
email: [chenry@imls.gov](mailto:chenry@imls.gov)

Mark Feitl  
phone: (202) 653-4635  
email: [mfeitl@imls.gov](mailto:mfeitl@imls.gov)

### Check Shipping Envelope and CD

If you have not already done so, refer to the contents on the Reviewer Checklist. Open the enclosed CD to check that all applications are there and can be opened. Contact IMLS immediately if any of the items listed are missing, or if any applications are missing or cannot be opened.

### Conflict of Interest

Read through your list of applications to see if there are any potential conflicts of interest. Please see the Conflict of Interest Statement included in your packet. A conflict of interest would be if you have a financial interest in whether or not the proposal is funded, or if for some reason, you feel that you cannot review it objectively. Contact IMLS immediately if you have a conflict, or what may appear to be a conflict.

### Confidentiality

The information contained in grant applications is strictly confidential. Do not discuss or reveal names, institutions' project activities, or any other information contained in the applications. Contact IMLS if you have any questions concerning an application – do not contact an applicant directly.

### Read Applications

Read your applications to develop a feel for the range of responses. Before reading your applications, reread the narrative questions and guidelines on pages 31-32 of the *2010 Conservation Project Support Grants Application and Guidelines*. Additionally, a CPS evaluation criteria list is included in your review package. Place this sheet in your workspace where you can easily refer to it throughout the review process. 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

Read your applications again and take notes as you read. Draft comments for each of the four narrative responses. Utilize the evaluation criteria on the Review Evaluation Criteria sheet. We strongly recommend that you draft your comments using Microsoft Word, and then cut and paste them onto the online review form (see page 8 for more details).

- Use your professional knowledge and experience to assess the information objectively.
- Judge the application on its own merits. DO 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.
- DO NOT contact the museum.
- Acknowledge and compliment strengths.
- Consider a project's strengths *and* weaknesses; acknowledge and compliment strengths; offer practical suggestions for improving weaknesses.
- Consider whether the applicant has the resources to successfully complete the project.
- Comments should *analyze* the narrative section of the application; summarizing or paraphrasing the applicant's own words will not help the applicant.
- Comments should be specific to the individual applicant; vague, general statements are not helpful.
- Comments should be easy to read and understand.
- Comments should address both positive aspects as well as areas for improvement.

Remember that IMLS staff uses your comments to help applicants improve their future applications.

**Qualities of a Good Proposal**

A good CPS proposal should:

- Address one of the institutions highest conservation priorities
- Assist the museum in implementing a logical, institution-wide approach to caring for their collections
- Show that the project is well planned and the museum has the appropriate resources to complete the project

**Assign Scores**

Assign preliminary scores to each narrative section. Use a scale of 1 to 7. 1 = Lowest; 7 = Highest

- Use whole numbers only
- Do not use fractions, decimals, zeros, or more than one number

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.
- 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.

### **Type Size and Format**

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

The application does not provide a form for the narrative part of the application. Applicants can divide the space for narrative responses as they wish, as long as all questions are addressed in number order as indicated on in the application guidelines and the narrative response does not exceed seven pages. A minimum one-quarter inch margin should be left on the sides and bottom of the page.

If you see a problem, however,

- Call IMLS at (202) 653-4674.
- 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 as a separate note for IMLS only.

We will assign penalties as needed.

### **Review Your Work**

Review your draft comments and preliminary scores. When you are finished, proofread your reviews. Adjust your scores, if necessary, to more accurately reflect your written evaluation. Scores must support comments and comments should justify scores.

### **Write Specific Comments and Assign Scores**

Type your final comments and scores on your online review sheets (for narrative sections 1-4 plus general comments if applicable). For each application, you must complete an online review including:

- Written comments about the applicant's narrative responses.
- A corresponding score for each response.
- Application overview (general comments), optional.

## The Online Review Process

All reviewers must use the online review process. Just follow these steps:

Access this link:

<https://e-services.ims.gov/grantapps/reviewers.aspx>

Your login is the e-mail address that is on file with IMLS.  
Your password is “password”, unless you already established a password in previous years.

When you login to create your user account you will need to assign a new password.

The instructions for creating and submitting your reviews will be at your fingertips. For all questions about reviewing, either technical or programmatic, please contact IMLS staff at (202) 653-4674. Please do not use the hotlink for technical assistance, as your questions may take a long time to be answered.

Once you have completed assigning scores and providing comments for each application assigned to you, submit the entire review to IMLS. Make sure to print a copy of each completed review to keep for your files.

### Reminders

The online review process is a wonderful tool; however, there are a few points regarding the use of the online review process of which you should be aware:

- When accessing this system you can only use the e-mail address we have on file for you.
- Once you submit your reviews, you cannot go back in and make revisions. To do so, you must contact IMLS and we will authorize your re-entry into the system so you can make changes. However, prior to submitting your reviews, you can repeatedly enter and exit the system without losing your information.
- The online review system seems to work best with Internet Explorer, Firefox and Safari.
- Complete your online reviews by **December 14, 2009**.

### Constructive and Effective Comments

As you formulate your comments, keep in mind the following characteristics of good, constructive remarks:

- They are presented in a constructive manner
- Concise, specific, easy to read and understand
- Acknowledge the resources of the institution

- Correlate with the score that is given
- Reflect the application's strengths and identified areas for improvement
- Directed to applicants for their use

Remember, both successful and unsuccessful applicants use your comments to improve their institutions and future applications. Each of the sample comments listed below is followed by an explanation of its good characteristics.

**2. Project Design:**

The project designed is a systematic approach to complete a base map for the lower garden areas, complete the Plant Record Database, and map and label the specimens in the garden. The tools they propose to use include AutoCAD, Access, and label machine and Vision software. These will help the applicant to achieve their intended goals. However, Activity I is unclear. The land survey includes infrastructure, trees, boundaries, and markers. This map, with a 2' contour can be easily converted into AutoCAD format and is ready to merge with maps of other areas of the garden. The description presented here is not detailed enough to understand why it takes 80 hours to format the data. (specific, clear, concise and helpful)

A key component to the success of this work lies in the use of positive reinforcement training to gain the cooperation of the subject animals. This renders the collection of cytological samples and even ultrasound records minimally invasive and virtually stress free for the bears. Thus, much higher sampling rates will be possible, increasing the reliability of the results. The video monitoring will provide easily collected, standardized behavioral data. Scoring video data is difficult at best, but having all of the scoring performed by a single individual or small group trained by a single person should greatly increase the reliability of the video records. All of this increases the probability of the production of highly reliable new data that will be of tremendous benefit in the management of this seriously declining population. (detailed, specific to application)

**Avoiding Poor Comments**

Vague, derogatory, or extraneous remarks are not helpful to either panelists or applicants. These comments actually hinder the evaluation process rather than help it.

To avoid making poor comments, DO NOT:

- Make derogatory remarks. Offer suggestions for improvement rather than harsh criticism.
- Penalize an applicant because you feel the institution doesn't need the money. Any eligible institution may receive funds, regardless of need.

- Penalize an applicant because of missing materials. If you believe an application is missing required materials, please contact IMLS immediately.
- Question an applicant’s honesty or integrity. You may question the accuracy of information provided by the applicant, but if you are unsure how to raise your question, contact IMLS.
- Offer or ask for irrelevant or extraneous information – your comments should concern only the information IMLS requests of applicants.

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

**1. Statement of Need:**

“This project fits into the overall ‘big picture’ for the art museum and the university as a whole.” (Vague, not evaluative)

**2. Project Design:**

“Efficient breakdown of categories for the individual parts of the project.” (Vague, irrelevant, not evaluative)

“Conservation methods and the time table are presented in exceptional detail and almost to the point of overkill.” (Vague, not evaluative, insensitive)

**3. Project Resources: Time, Personnel, Budget:**

“I might question some parts of the budget, but they probably know what they are doing.” (Vague, not evaluative, and irrelevant)

“The project budget is reasonable for this kind of project.” (Vague, not evaluative)

“The personnel are clearly experienced and qualified.” (Vague, not evaluative)

**4. Impact:**

“The benefits stated are better can and monitoring of the collection, which is adequate.” (Vague, insensitive, misspelled)

**5. Overview (optional)**

“This is worthy of funding; however, I would ask the project contact person for some additional details if appropriate.” (Vague, wrong audience)

### Reviewer Material

<b>Deadline</b>	The Deadline to submit IMLS panel reviews via the online review interface is <b>December 14, 2009</b> .
<b>Keep Copies Until</b>	Keep your applications and a copy of your review sheets until May 31, 2010 (in case of questions from IMLS staff). <ul style="list-style-type: none"><li>▪ Maintain confidentiality of all applications that you review.</li><li>▪ After May 31, 2010, destroy the applications.</li></ul>

**Thank you for serving as a CPS Field Reviewer!**

## Frequently Asked Questions

**1. How should I assign scores?**

Scores should be assigned for all of the 4 narrative questions, based on the scale of 1–7 discussed on page 8 of this booklet.

**2. Should I consider new projects more competitive than resubmissions?**

No, all projects whether new or resubmissions should be considered based on the current proposal. An institution's application history should not be a factor in your evaluation.

**3. What should I do if I discover something missing in the application? Or if the applicant did not complete all parts of the application?**

Call IMLS immediately at (202) 653-4674! We only check the original copy of the application for completeness. We may be able to send you the missing materials.

**4. Should I consider need when evaluating an application?**

No, need is not a review criterion. The institution should be evaluated based on, among other things, whether or not it makes a convincing case that the project is one of their highest conservation priorities as documented in their narrative and supporting documentation.

**5. To whom should the review comments be addressed?**

Please address all comments to the applicant. While the IMLS panelists read the comments, it is important to write the comments to the applicant so they may use them constructively.

**6. What should I do if I find that I know someone mentioned in the application?**

Call IMLS immediately and discuss the possibility of a conflict of interest. Not all cases are conflicts, but please call us to discuss your situation.

**7. Must I make comments for every question?**

Yes, you must make a constructive and substantive comment for every question. This is the best way to help an applicant improve all aspects of their application.

**8. What are indirect costs rates, and why do some institutions have such a high rate?**

Indirect cost rates are negotiated rates for institutions to charge overhead costs when completing a project. Some institutions, such as universities have very high rates because of the infrastructure involved in carrying out a project within that institution. Also, an institution may have a high rate if they are in a very isolated geographic area, making it more expensive to carry on daily activities. Please do not allow these rates to bias your reviews.

**10. How was I selected to review these applications?**

You were selected to review your particular group of applications based on the conservation skills you indicated on your IMLS reviewer update and also based on your choice of project type and type of materials with which you have the most experience.

**11. Is there any type of project that carries more weight than another?**

No, all types of projects have equal weight. The project, however, must meet one of the applicant's highest conservation priorities.

**12. What happens to my reviews once they are submitted?**

We take the average of all three reviewer scores and rank the applications from highest to lowest. We then take, approximately, the top 75% to panel for consideration.