

Field Review Instructions

Museums for America- Museums Empowered

Introduction

- You will access the applications assigned to you by clicking on a link provided to you in an email message from your IMLS primary contact.
- You will enter your scores and comments through the IMLS Online Reviewer System.
- You will use a 7-point scale for each of three sections of the application narrative: Project Justification, Project Work Plan, and Project Results.
- Scores must be in whole numbers only. Fractions, ranges, decimals, and zeroes are not allowed.
- You must write a constructive and substantive comment of between 30 and 2000 characters in length for each section of the application narrative.
- All three sections of the narrative have equal weight and are equally important in identifying the overall strengths and weaknesses of an application.
- Address your comments to the applicant, not to IMLS or to panel reviewers.
- Each comment should reflect the numeric score you provide for the corresponding section of the narrative.

Step-by-Step Instructions

1. Verify Access to Applications

Use the link provided to you in an email message from your IMLS primary contact to access the applications assigned to you. Make sure you see all the applications referenced in the email, and then save each to your computer in a secure place that is not accessible to others. Call or email your IMLS primary contact immediately if any applications are missing or if you cannot open them.

Confidentiality in IMLS Peer Review: 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.

2. Verify Access to IMLS Online Reviewer System

Use the following link to verify that you have access to the IMLS Online Reviewer System:

<https://www.ims.gov/grants/become-reviewer/reviewer-resources/museum-reviewer-resources>

Then scroll to the bottom of the page to "Review Online," and click on the link to access the Online Reviewer System Login.

To login, enter the email address you have on file with IMLS, and use the default password: **password**. An **E-Review Security Screen** will appear. Read this page and click **OK**. Next, create a user account and establish your own password.

Technology Issues (See also the Appendix of this document.)

Browsers: Microsoft Internet Explorer® is the only reliable Web browser that will successfully work with the IMLS Online Reviewer System. Unfortunately, the system is not fully compatible with Mac or Microsoft Vista operating systems nor with browsers such as Mozilla Firefox, Apple Safari, Camino, or Opera.

Compatibility View Settings: If you are using Internet Explorer® and experience difficulty in viewing the text in the IMLS Online Reviewer System, try adding www.imls.gov to Compatibility Views under “Tools.”

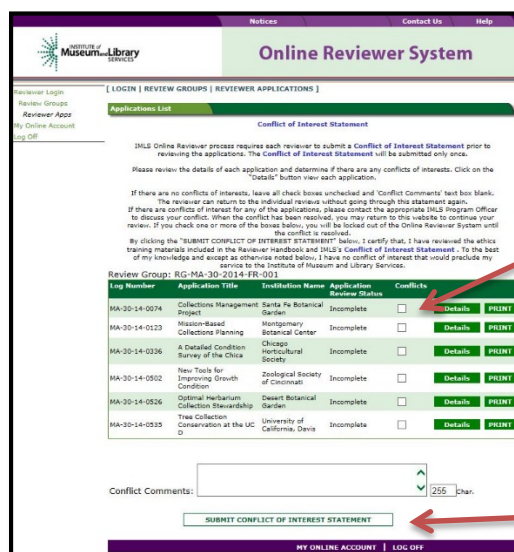
Passwords: There is no need to remember or rediscover a password you may have created in prior years. We reset all passwords for the IMLS Online Reviewer System to the default at the end of each review cycle, and so all reviewers must use the default to establish new accounts. If at any time during the review process you forget the password you created, call or email your IMLS primary contact to reset your password to the default.

3. Assess Potential Conflicts of Interest

After you have created a new password, click **REVIEW GROUPS**, and your review assignment will appear. To access the list of applications assigned to you, click **VIEW**.

Read through your list of applications again to see if there are any potential conflicts of interest. Please see [“Complying with Ethical Obligations and Avoiding Conflicts of Interest.”](#)

CAUTION: Depending on your computer’s operating system and/or the browser you use, you *may* see a screen with a column labeled “Conflicts” with a checkable box by each application. **Do not check any of these boxes** as doing so will disable access to the system and make it impossible for others in your review group to do their work. Instead, call or email your IMLS primary contact immediately if you have a conflict, or what may appear to be a conflict.



If you have no conflicts of interest with any of the applicants on the list, click **SUBMIT CONFLICT OF INTEREST STATEMENT** at the bottom of page.

4. Read Applications

Revisit the Museums Empowered Notice of Funding Opportunities at <https://www.imls.gov/grants/available/museums-empowered-professional-development-and-capacity-building-opportunities> . Then read the applications, keeping in mind the review criteria for each section of the narrative. You will not need to reference each bullet point in your comments, but these questions should guide your thinking about the strengths and weaknesses of each application.

About Performance Measurement

On the Program Information Sheet (Section 4), applicants were required to select at least one pre-determined performance goal that reflects a measurable change or outcome they intend their project to achieve. All Museums Empowered applicants were instructed to select the IMLS agency-level goal for Learning and check the box for the performance goal “Train and develop museum and library professionals.” This performance measure statement is associated with specific information that they will be required to collect during the grant period and report at the end of their projects.

These pre-determined performance goals statements will help IMLS document the collective achievements of the projects we fund, and they may be found here: <https://www.imls.gov/performance-measure-statements-and-information-learning-and-community-projects>. Elements that you as a reviewer will evaluate in the Project Impact section of each application relate directly to performance goal(s) and performance measure statement(s).

5. Draft Comments

You must write a constructive and substantive comment for each section of the narrative for each application you review. All three sections of the narrative have equal weight and are equally important in identifying the overall strengths and weaknesses of an application.

To organize notes for writing your comments, you may wish to use the “[Field Review Notes Template](#)” to record notes that will help you prepare your review comments. Your final review comments should be written in complete sentences and constitute strong, coherent, constructive, and substantive assessments of each section of the application narrative.

Think about the review criteria for each section of the application narrative, and be sure to consider all the required components of the application as well as relevant Supporting Documents as resources for your assessment. Draft your comments using a word-processing program for later copying and pasting into the IMLS Online Reviewer System. Remember that each comment must be between 30 and 2000 characters long.

When drafting your comments ...

- use your professional knowledge and experience to assess the information objectively.
- judge the application on its own merits, and do not base your evaluation on any prior knowledge of an institution.
- if you question the accuracy of any information, call us—not the applicant—to discuss it.

Effective comments ...	Poor comments...
<ul style="list-style-type: none"> • are presented in a constructive manner. • are both substantive and easy to read and understand. • reflect the resources of the institution. • are specific to the individual application. • reflect the numeric score assigned. • highlight the application’s strengths and identify areas for improvement. • are directed to applicants—not IMLS or panel reviewers—for their use. 	<ul style="list-style-type: none"> • simply summarize or paraphrase the applicant’s own words. • make derogatory remarks. • penalize an applicant because you feel the institution does not need the money. • offer or ask for irrelevant or extraneous information. • make vague or overly general statements. • question an applicant’s honesty or integrity.

Make sure your comments justify the scores you provide. A highly complementary comment does not “remove the sting” of a low score, and a negative comment does not “even out” a high one. Comments and scores must complement each other and make sense as a whole.

Below are some examples of **effective** field reviewer comments:

Project Justification	
<p>“You clearly identify a critical need among the staff of your museum. The professional development activities are part of a comprehensive strategy designed to strengthen the capacity of the institution. Your intended results are achievable within the project time period and incorporate current research and best practices. The proposed project is an excellent fit for the Museums Empowered special initiative.”</p>	<p><i>Comment is substantive, addresses the review criteria, and employs a positive tone.</i></p>

<p>“Your museum is making good strides in revising your Strategic Plan. The project outlined fits the Organizational Management focus area and is necessary for you to move forward. I started to read the application with great support but slowly came to wonder if there was a clear sense of direction and execution. For example, I am not clear about the role of the curator since she was not mentioned in the narrative and her resume was missing from the application.”</p>	<p><i>Comment correlates with the score of 3 and makes implementable suggestions for improving the project.</i></p>
<p>“You make a strong case for the need to develop new curriculum for K-12 audiences visiting the museum and have identified partnerships with the local school district. However, I could not find any supporting material about how this project would build the internal capacity of the museum through professional development for museum staff – and therefore this project does not meet the goals of the Museums Empowered special initiative.</p> <p>This project more closely matches the goals of the Museums for America – Learning Experiences grant program and you may want to consider submitting an application to the MFA program in a future year.”</p>	<p><i>Comment correlates with the score of 1 and makes implementable suggestions for securing funding.</i></p>
<p>Project Work Plan</p>	
<p>“Your work plan is clear and outlines many of the details lacking in the project justification. Your consultants are well qualified to guide museum staff in writing a new strategic plan. You might find more ways to incorporate staff training development into the process – perhaps consider ways to support staff in engaging with the community over key issues of importance.</p>	<p><i>Comment provides a constructive assessment of the application and suggestions likely to benefit the applicant.</i></p>
<p>“Your proposal shows that your staff has done a good job of working with the community on past projects and has an excellent relationship with your neighbors and relevant community partners. The proposed project makes good use of a community advisory committee and of using evaluations at various points throughout the run of the project.</p> <p>“Your schedule of work shows a well-thought-out list of activities suitable to the challenges identified. Your timeframe, personnel, and budget resources are appropriate for the scope and scale of the project, and you adequately discuss how you will meet the cost-sharing requirement. Today, many museums are looking for ways to increase their community engagement and boost the economics of their region. I would have liked to have seen some information on how you could/will share your results or discoveries at the end of</p>	<p><i>Comment is evaluative, addresses the review criteria, and makes implementable suggestions in a positive tone.</i></p>

<p>the project. This project could serve as an excellent case study for others to emulate, and you might think about ways to share your results with your colleagues across the country—e.g. an article in a professional journal, a session at a regional or national conference, a webinar.”</p>	
Project Results	
<p>“You program evaluation will yield specific and measurable results about the impact of the professional development and training program on museum staff. The focus on change management and succession planning supports the core issues identified in your needs assessment. The revised strategic plan, built upon a solid core of staff training and development, will result in a more resilient museum that can respond to the changing needs of your community. I would have liked to have seen more plans for sharing your work beyond posting your new strategic plan on the website.”</p>	<p><i>Comment addresses questions from the review criteria.</i></p>

In contrast, below are some examples of **poor** field reviewer comments:

Project Justification	
<p>“The project is justified; there is a clear need to catalogue and document this material. This collection is an important part of the permanent collection at the museum.”</p>	<p><i>Comment is not relevant to MFA program goals.</i></p>
<p>“The museum will hire a temporary curator to develop and fabricate an exhibition to coincide with their town’s bicentennial. They will exhibit materials from their archives and private collections from community stakeholders. The project will be two years in length.”</p>	<p><i>Comment paraphrases the applicant’s own words.</i></p>
Project Work Plan	
<p>“The work plan would be improved by putting in more time onsite.”</p>	<p><i>Comment is very brief and has little value to the applicant.</i></p>
<p>“The design of the exhibition is boring and not even remotely relevant to the museum’s mission. The staff is woefully unprepared and will fail in the execution of this project. Targeting federal funds to this museum is a mistake.”</p>	<p><i>Comment is derogatory and does not provide useful feedback.</i></p>
Project Results	
<p>“Strong results with very sustainable benefits.”</p>	<p><i>Comment is very brief and has little worth or value to the applicant.</i></p>

The chart below summarizes the most frequently asked questions from field reviewers:

Should I consider ...?	Yes	No
Whether a project meets the high level goals of the institution’s strategic plan	X	
An institution’s financial or staffing needs		X

Whether the project is well planned and the organization has the appropriate resources to complete the project	X	
Whether the applicant has included the information necessary for an adequate evaluation of its merits	X	
Whether a project is new or a resubmission		X
The size or age of the organization		X
An institution's indirect cost rate		X

6. Assign Scores

Assign a preliminary score to each of the three sections of the application narrative: Project Justification, Project Work Plan, and Project Results. Use a scale of 1 to 7, as described below. Use only whole numbers; do not use fractions, ranges, decimals, or zeroes.

SCORE DEFINITIONS	
7 – Exceptional	The applicant's response is exceptionally strong with essentially no weaknesses in its support of the proposed project.
6 – Excellent	The applicant's response is very strong with no more than one minor weakness in its support of the proposed project
5 – Very Good	The applicant's response is strong with only a few minor weaknesses in its support for the proposed project.
4 – Good	The applicant's response is adequate but with numerous minor weaknesses in its support for the proposed project.
3 – Some Merit	The applicant's response may have some strengths but has at least one moderate weakness in its support for the proposed project.
2 – Poor	The applicant's response is deficient and has at least one major weakness in its support of the proposed project.
1 – Inadequate/Insufficient	The applicant's response is either inadequate or insufficient to evaluate fully and/or has numerous major weaknesses in its support of the proposed project.
<i>Minor</i>	<i>An easily addressable weakness that does not substantially lessen the impact of the project</i>
<i>Moderate</i>	<i>A weakness that lessens the impact of the project</i>
<i>Major</i>	<i>A weakness that severely limits the impact of the project</i>

7. Review Your Work

Review your draft comments and preliminary scores. A review with even one missing score or comment cannot be accepted by the IMLS Online Reviewer System. Adjust your scores, if necessary, to reflect more accurately your written evaluation. Scores should support



comments, and comments should justify scores.

8. Enter Scores and Comments

Return to the IMLS Online Reviewer System at

<https://www.imls.gov/grants/become-reviewer/reviewer-resources/museum-reviewer-resources>

Then scroll to the bottom of the page to “Review Online,” and click on the link to access the Online Reviewer System Login.

Login with the email address you have on file with IMLS and the password you created in Step 2. Go to your list of assigned applications and click **REVIEW** beside any of them to begin.

Copy and paste your comments into the appropriate blue blocks for each section of the narrative for each application. Choose a numeric score between 1 and 7 from the **SCORE** dropdown menu. Be sure to save each comment by clicking **SAVE** at the bottom of the page before you move on to the next one. Use the controls on the side or top of the screen to navigate between sections.

IMPORTANT: If you are reviewing applications requesting between \$5,000 and \$25,000 in IMLS funds (application log numbers begin with MA-41), you must enter additional information into the Application Overview section of the Online Review System.

Add the phrase “I RECOMMEND this application for funding” or “I DO NOT RECOMMEND this application for funding” in that section. You may add additional text here if you wish.

Once you have completed assigning scores and providing comments for each application assigned to you, we recommend that you print a copy of each completed review to keep for your files. Then click on **I AM READY TO SUBMIT THIS REVIEW TO IMLS** to send all your work to IMLS. At this point, you will not be able to re-enter the IMLS Online Reviewer System unless you notify your IMLS primary contact.

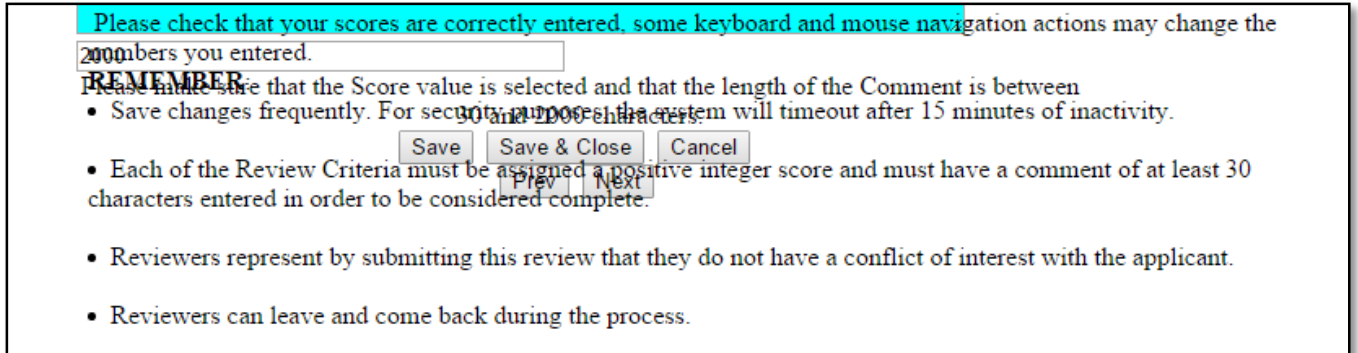
For all questions about reviewing, either technical or programmatic, please call or email your IMLS primary contact directly.

9. Manage Your Copies

Keep your applications and a copy of each review sheet until **September 30, 2017**, in case there are questions from IMLS staff. Continue to maintain confidentiality of all applications that you review by keeping electronic and paper copies in a secure place. After September 30, 2017, destroy the applications and review sheets, notes, and note templates.

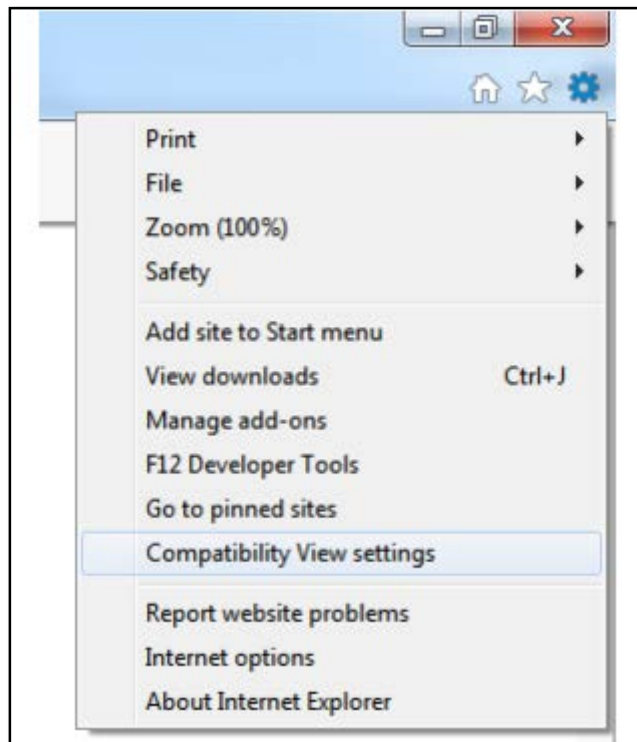
Appendix: Online Reviewer System Troubleshooting

When using certain browsers, including versions of Internet Explorer, Chrome, Safari, or Opera, you may see text displayed in the Online Reviewer System superimposed on top of buttons or menus, making the buttons difficult or impossible to click. It may look like this:

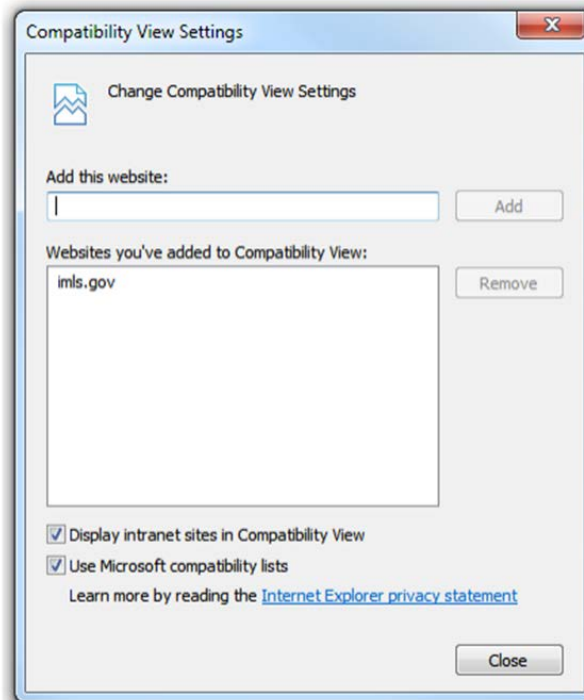


If you use **Internet Explorer (IE) with Compatibility View (or Compatibility Mode) enabled**, you may resolve this issue with the following steps:

1. Locate the Settings menu in the top right corner of the browser window and select Compatibility View settings.

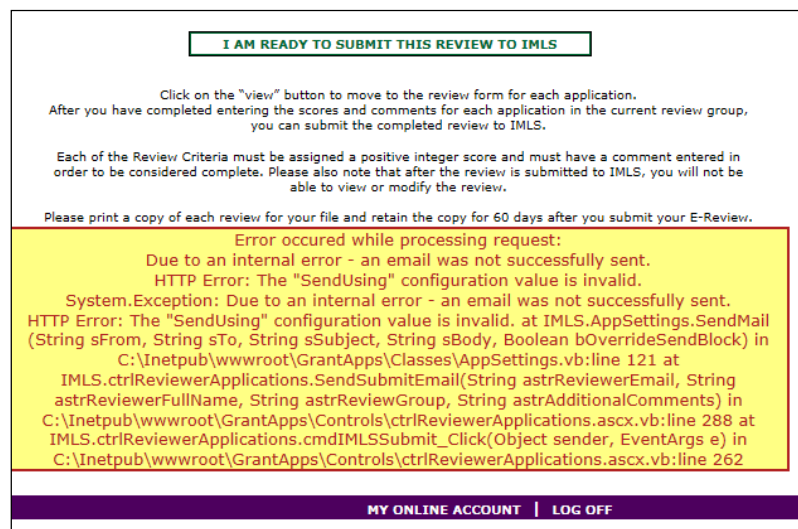


1. Type “imls.gov” in the **Add this website:** dialogue box, then click **Add**.



If you are using another version of IE, please refer to the help documentation for your version, or contact IMLS for assistance.

When you submit your comments and scores you may encounter the following error message:



Don't worry. IMLS will have received your scores and comments if you receive this message.