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Institute of Museum Services

Conservation Project Support
Field Reviewer Instructions
I. INTRODUCTION TO CONSERVATION PROJECT SUPPORT AND THE REVIEW PROCESS

What is the Conservation Project Support Program?

Conservation Project Support (CP) is an annual competitive federal program that supports all types of museum conservation activities with matching grants. The program is designed to help museums identify conservation needs and priorities, to develop long range conservation plans and to implement activities to ensure the safekeeping of the nation's cultural, historic, and scientific heritage.

The National Museum Services Board has established funding priorities to encourage museums to begin with the most basic conservation activities and to move to more advanced activities. All types of conservation projects can be supported—general and specific surveys, improvements to collection environment, treatment, training and research—when the project is appropriate to the institution's conservation needs. Project proposals supported by the IMS Conservation Project Support grant program will usually demonstrate involvement of curatorial and conservation personnel and indicate institutional support for the activities.

How Are Applications Reviewed?

We use a combination field review/panel review process to evaluate CP applications. Reviewers are solicited from a variety of appropriate professional associations and through recommendations from previous reviewers. Reviewers are required to have a minimum of three years professional experience as well as relevant training in conservation.

Evaluation is based on the institution's responses to the eight areas of the CP application narrative and supporting documentation:

- Importance/significance of objects to collection and audience
- Relation of project to ongoing conservation activities
- Use or maintenance of project results
- Maintenance of ongoing museum services
- Design of project
- Methods of project activities
- Reasonable and adequate budget
- Qualifications of personnel/adequacy of time commitment.

The Role of the Field Reviewer

You are asked to provide a detailed and technical evaluation for a small number of project proposals. You will use your technical expertise to evaluate proposals for feasibility in regard to design, methods, personnel, and costs. You should consider the relative importance of the project based on the institution's stated conservation priorities. Your comments should be technical and detailed, especially with regard to any weaknesses you feel are present. Your comments will be sent to the panel reviewers and should, therefore, be addressed to your peers, not to the applicant or IMS staff.

A complete review includes:
- one score for each narrative response,
- written comments to support each score,
- a recommendation for funding, and
- general comments about the application.

We use your scores and overall evaluations to organize the applications for panel review according to the likelihood of receiving funding.
The Role of the Panel Reviewer

The group of 16 panelists meets in Washington, DC. to reconcile any discrepancies in the recommendations of the field reviewers, to resolve any problems which may have developed during the review process, and to make funding recommendations.

Panelists are given the completed field review sheets with each application. Since each person on the panel reviews several groups of applications (approx. 50 - 65 individual applications) their assessment is necessarily broader than that of the field reviewer. Panelists rely on the more detailed, technical evaluations of the field reviewers to identify specific strengths and/or weaknesses of an application.

Working in teams of two, panelists use the comments and recommendations of the field reviewers, and their own expertise, to provide an overall assessment of each application. The teams present their evaluations to the complete panel for discussion. Final funding recommendation are made by the full panel. These recommendations are forwarded to the National Museum Services Board and the Director of IMS.

How Are Results Communicated to Applicants?

We usually announce the awards in mid-August. At that time, we notify all applicants by mail to tell them if they have received an award. We also send a list of grantees to all participating reviewers. Applicants are given a summary of the comments and recommendations made by field reviewers and panelists. This summary can be used to strengthen the project proposal for resubmission at a later time.

II. Application Review Instructions

All reviewers, even experienced ones, must carefully read the reviewer instructions to be certain they understand what is expected of them and to ensure the fairest possible competition for applicants. This section contains instructions for completing the review process. On the back cover is a checklist of steps to help you pace yourself through the next four weeks. We strongly recommend that you follow these procedures as they are based primarily on suggestions of previous CP field reviewers.

Our processing schedule requires some of these steps. The actual method of evaluating each application, however, is up to you. Previous reviewers estimate that it takes a minimum of two hours to evaluate each application. Please allow enough time to do your best work and still return all completed review sheets to IMS by April 6, 1990.

Conservation Project Support Review

The Fundamentals

This section of the handbook contains:

- technical information about the review process
- a list of helpful reminders

If you have questions about any of these materials, please contact IMS. The Program Office number is: (202) 786-0539.
Before you begin the actual review of your applications, you must completely understand the remainder of this handbook and this year's Conservation Project Support Grant Application and Information packet. The application guidelines are revised each year and will have changed in ways that affect your evaluation.

Remember that Conservation Project Support is your program and reflects the contributions that you and other dedicated reviewers make to it. Thank you for the time and commitment you are pledging to the Institute of Museum Services and to our nation's museums.

How Are Applications Assigned?

We assign applications for field review assignment on the basis of three aspects of the project proposal identified on the application face sheet:

- Category of Collections
- Type of Project
- Types of Materials.

We then assign applications to review primarily on the basis of your areas of expertise as they correspond to the types of material.

Many combinations are possible, so you may not receive applications that are your first choice for review. Since conservation is a highly technical and specialized field, our primary concern is that you are qualified to provide an accurate evaluation of the types of projects and materials represented in your assigned applications.

Conflict of Interest

We check assignments for potential conflicts of interest before we send them to you but you may identify others. Read through your list of applications to see if there are any potential conflicts of interest. The following conditions reflect a conflict:

1. You, your spouse or minor child are involved with the applicant institution, or in the project described in the application, as a paid consultant or through other financial involvement.

2. The application is presented on behalf of an institution with which you, your spouse or minor child are negotiating future employment.

3. Through prior association as an employee or officer, you may have gained knowledge of the applicant which could preclude objective review of its application. (Past employment does not, by itself, disqualify a reviewer so long as the circumstances of your association permit you to perform an objective review of the application.)

If an application presents no conflict of interest at the time you review it, one may still develop later on. Once you have reviewed an application, you should never represent the applicant in dealings with the Institute of Museum Services or another federal agency concerning the application, or any grant that may result from it.
Confidentiality

We do not release the names of field reviewers to the institutions they evaluate. In turn, we request that you do not discuss the applications you are assigned with anyone else. If you have any questions about an application, please call IMS; do not contact the applicant.

We expect you to review all of your assigned applications; however, if you feel you cannot accurately and objectively review any application assigned to you, please contact us immediately so we can reassign it.

How To Review

Project Eligibility

Pages 4 - 15 of the Conservation Project Support Grant Application and Information packet contain a full discussion of the types of projects that are eligible for IMS funding through this program. Briefly these are:

- General survey of collections and environmental conditions
- Detailed condition survey of collections
- Training in conservation
- Research in conservation
- Conservation treatment of collections
- Provision of optimum environmental conditions.

Conservation Project Support grant funds are not intended to support:

- the regular, ongoing operating costs of an institution
- projects deemed to be purely or primarily collections management activities
- projects for the construction or major renovation of facilities
- acquisition of objects or species to collections.

Please call the IMS staff if you have any questions regarding a project's eligibility.

Exceptional Projects

IMS encourages proposals for exceptional projects that would benefit a broad category of museums or that would have broad applicability for conservation care beyond the individual museum applicant. Such projects may request more than the usual ceiling of $25,000. You should evaluate these applications by considering the degree to which the project would have broad benefit. [If an applicant requests over $25,000 for a project that does not have broad applicability to museums or conservation care, evaluate the application as you would any other. Panelists will be asked to evaluate whether the project can be successfully completed with no more than $25,000 in IMS funds.]

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1Projects providing optimum environments for Living Collections, or treatment of historic structures and sites may include minor renovation costs that can be supported with IMS funds.
**Application Completeness**

Charts on pages 8 - 15 of the Conservation Project Support Grant Application and Information packet provide details for:
- the types of eligible projects for each category of collections,
- the required supporting documentation, and
- the suggested supporting documentation.

We have examined each application for completeness. However, some of the supporting documentation requires technical expertise for evaluation. If you feel that adequate supporting documentation for a project has not been provided, please identify the inadequacy in your comments for the relevant criteria. In the space for additional comments you should also describe why the information is inadequate to properly evaluate the project or why it does not adequately support the request.

**Evaluating for Appropriateness**

Applicants are asked to relate projects to their institutional conservation needs and ongoing museum services. Institutional conservation needs may be demonstrated by a general conservation survey report, long-range conservation plans, or equivalent documentation from the museum. If a proposed project is not supported by such documentation, the applicant should provide sufficient justification for making the request at this time.

You should also evaluate applications for feasibility. Look for a sufficient commitment by the applicant of time, personnel, and finances to carry out the project. The design and management plans should be appropriate to the project. The proposed methods should be technically suitable.

**Project Budget**

Because you are experienced in carrying out similar projects, we ask you to pay attention to both individual items and total project costs. All costs must be justified for a given project. Applications recommended for funding should have budgets that reflect no more and no less than the total amount necessary to successfully complete the project. We will review the project budgets for all applications that are recommended for funding to ensure that all costs are eligible.

You may receive applications that request IMS to support more than 50% of the project costs. Application instructions clearly state that, "IMS funds may be used to pay up to one-half the cost of the project." In these instances, please note in your specific and general comments that the applicant has not demonstrated a commitment of resources of at least 50% of the total project costs.
**Scoring the Applications**

You will receive enough application review sheets for each assigned application, plus several extra sheets. Using one review sheet for each application, evaluate the institution on a scoring scale of 1 through 7 (1=lowest; 7=highest). In scoring the application, you provide both a numerical score and written comments explaining each score. The scores should reflect your assessment of the project based on the applicant's response to each of the evaluation criteria. Definitions of the numerical scores are provided below.

<table>
<thead>
<tr>
<th>SCORE</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Applicant's response provides insufficient information to evaluate this criteria.</td>
</tr>
<tr>
<td>2</td>
<td>Applicant's response provides inadequate support for the proposed project activities.</td>
</tr>
<tr>
<td>3</td>
<td>Applicant's response provides minimal support for the proposed project activities.</td>
</tr>
<tr>
<td>4</td>
<td>Applicant's response provides adequate support for the proposed project activities.</td>
</tr>
<tr>
<td>5</td>
<td>Applicant's response provides good support for the proposed project activities.</td>
</tr>
<tr>
<td>6</td>
<td>Applicant's response provides superior support for the proposed project activities.</td>
</tr>
<tr>
<td>7</td>
<td>Applicant's response provides exceptional support for the proposed project activities.</td>
</tr>
</tbody>
</table>

Assign whole numbers only to each of the nine narrative responses. *Do not use fractions, decimals, zeros or more than one number. Score all responses; do not leave any blank.*

All four aspects of your part of the review process – the numerical scores, your supporting comments, recommendations for funding, and your overall assessment of the application – are critical to the success of the Conservation Project Support program. We rely on your careful review to ensure the appropriateness of the project to receive federal support through this program and to enhance the safekeeping of the objects identified in the proposal.

We greatly appreciate your participation in this review process and your service to the museum and conservation fields.

We are normally in the office from 8:00 am to 6:00 pm Monday through Friday. Please call us when:
- something seems to be missing from an application
- you have a question
- you would like to comment on the review process.

**IMS Program Office**

202/786-0539
REMINDERS TO ENSURE A GOOD REVIEW

Call IMS immediately if you find that you cannot serve as a reviewer or if you have any questions or problems.

Call IMS if any part of an application appears to be missing.

Carefully read all instruction materials, application guidelines, and narrative criteria.

Budget your time properly so that each application receives a fair reading.

Base your evaluation on the technical feasibility and appropriateness of the project.

Address your comments to the panel reviewers, your peers.

Please type your comments so that IMS staff and the panelists can read what you have to say.

Return your review sheets by the stated deadline to avoid any delay in processing of the applications.
**CP REVIEW PROCEDURES**

- Check your shipping box to make certain that all of your reviewer materials and applications are included.
- Read your Contract. If you see that you cannot fulfill the terms of the contract, all IMS immediately.
- Read the "Application Review Instructions" thoroughly.
- Read the 1990 Conservation Project Support Grant Application and Information packet. Pay particular attention to the guidelines for project eligibility, the application review criteria, and the instructions for preparing the project budget.
- Read every application through one without assigning any scores. Use this reading to develop a sense of the range of quality of the applications. IMS staff has checked each application prior to shipping your box. If you have doubts after this first reading about the completeness of an application or an institution's eligibility, contact IMS immediately.
- Read the "Application Review Sheet" instructions on the back of the review sheets for detailed information on completing these forms.¹
- Read each application again, thoroughly. Check carefully to see that all information required for a complete application has been provided. Assign scores and write your justifying comments at this point.
- Review your scores and comments as a whole. Adjust any as necessary. Check to see that you have reviewed all your applications, scored all responses and provided substantive comments. You can make general comments on the application in the area provided at the bottom of the review sheet.
- In the space provided at the bottom of each review sheet, indicate your overall assessment of the project. Your recommendation and comments will assist the CP review panel in making final funding recommendations.
- Return the Application Review Sheets and your signed contract to IMS by the deadline. The review sheet is a four-page, pressure-sensitive form. Be sure that you have signed the front of each review sheet and attached one of the labels with your name and reviewer number. Return the first three copies of the completed review sheets and your signed contract using the self-addressed stamped envelope.
- Complete your reviewer questionnaire. This form asks you to assess your review experience and to suggest ways to improve the application or review process. We value your suggestions. You may submit the questionnaire with the completed review sheets or you may submit it later. Please return your questionnaire no later than the date indicated so that we have your comments available for the members of the review panel.
- Keep the applications and your copies of the review sheets (Reviewer Copy) for at least 60 days after mailing. This protects your work in case a problem occurs in the mail. After 60 days, destroy the applications and review sheets.

¹Review sheets may be reproduced on a computer/word-processor. Please use the format provided. Sign the original and attach your reviewer label before making copies. Return 3 copies to IMS, keeping one for your files.
1. Importance/significance of objects to collections and audience.

2. Relation of project to ongoing conservation activities.

3. Use or maintenance of project results.

4. Maintenance of ongoing museum services.

5. Design of the project.

6. Methods for project activities.

7. Reasonable and adequate budget.

8. Qualifications of personnel and adequacy of time commitment.

Please indicate your overall assessment of this project proposal.

1. Project activities are technically appropriate. Clearly demonstrated to meet the museum's highest conservation needs and priorities. Recommended for funding.

2. Project activities are technically appropriate. Worthwhile project, but not clearly demonstrated as meeting the museum's highest conservation needs and priorities. Consider further if funds are available.

3. Project demonstrated to meet the museum's highest conservation needs and priorities, but technically inappropriate. Not recommended for funding.

4. Project not demonstrated to meet the museum's highest conservation needs and priorities and technically deficient. Clearly does not deserve funding.

In order that IMS may provide unfunded applicants with information to improve future applications, please use this space to provide additional, specific comments concerning the technical deficiencies of the project activities and/or the applicant's failure to demonstrate the appropriateness of the project to its highest conservation needs and priorities.

I have reviewed the application cited above in compliance with the "Application Review Instructions" and to the best of my knowledge have no conflict of interest.

Signature _____________________________ Date _____________

IMS Copy