# Sample Reviewer Forms
## Ohio History Fund
### For Reference Only

What follows are the forms Ohio History Fund reviewers use to evaluate your application. We provide them so you can understand how your application will be reviewed. Each question that reviewers answer is derived from the application you are completing.

An application undergoes three stages of review: **1) Technical Review**, **2) Staff Review**, and **3) Panel Review**. The History Fund's review process is extensive because the money it grants is voluntarily given. The History Fund must demonstrate that each project it supports fills a deep need, will have a meaningful impact, and will succeed.

**1) Technical Review** is the first stage of review and is undertaken to ensure that the application is complete and meets the program's eligibility requirements. Incomplete or inaccurate items are scored on the Technical Review Check List. Panel reviewers (stage three) will consider these scores in the "Accuracy & Completeness of Application" section of their evaluation forms.

- **Use the *Grant Submission Check List* here to make sure your application is complete before you submit it!** Incomplete or inaccurate information could hurt your chance to receive a grant.

Applications that are a clear violation of the History Fund's *Guidelines* are removed from consideration at the Technical Review stage and receive no further review. If that unfortunate circumstance arises, we will contact the applicant and note the reasons the application is ineligible.

- **Make sure your project is eligible by reviewing the *Ohio History Fund Guidelines* here** Contact us with any questions!

"Technical difficulties," such as problems with uploads, are *not* grounds for rejection. If we contact you about a problem, please reply promptly! The faster we, working together, can address the issue, the sooner we can forward your application for the next stage of review.

Because of the number of applications and our tight schedule, History Fund staff only has time to complete one technical review of each submission. Errors called to the attention of applicants but left uncorrected may cause an application to be disqualified or will make it less competitive. Fix all errors we point out and keep your application in the running for a grant!

Contingent on the number of applications, technical reviews are usually completed within five weeks of the application deadline.

**2) Staff Review** is the second stage of application review. Ohio History Connection staff experts review projects in their areas of expertise to ensure the proposals are realistic and achievable (e.g. staff of the State Historic Preservation Office reviews Bricks & Mortar proposals, curators > museum exhibit proposals, Digitization Services staff > digitization projects, etc.).

Panel reviewers (stage three) use the context provided by a staff reviewer as they evaluate applications. Staff reviewers are enjoined from making funding recommendations.

Staff Review are usually completed two months after the application deadline, depending on the number of applications.

**3) Panel Review** is the third and final stage of application review. This stage is completed by a panel of non-Ohio History Connection experts from fields represented by History Fund grants. It is this outside panel that makes funding recommendations.

Depending on the types of applications received, the review panel includes historic preservationists, local historians, digitization experts, archivists, museum curators, academic historians, archaeologists, etc. The outside review panel reads grant applications and technical and staff review comments and meets to make funding recommendations.

Panel reviews are usually completed five months after the application deadline, contingent on the number of applications.

***Questions?*** We are happy to help! Contact:

**Andy Verhoff**
**Ohio History Fund & Outreach Manager**
**State Historic Preservation Office / Ohio History Connection**
**800 East 17th Ave., Columbus, OH 43211**
**614-562-4490 (cell) / 614-297-2341 (office)**
**averhoff@ohiohistory.org**

# *Technical & Staff Review*
# Sample Reviewer Forms

# History Fund 2024-2025 (FY25)

*Ohio History Connection*

## *Project Name*

### Project Name
*Character Limit: 100*

## *Technical Review Check List (History Fund staff use only)*

### Date(s) Reviewed
*Character Limit: 250*

### FUNDING CATEGORY
#### Choices
Bricks & Mortar
Programs & Collections
Programs & Collections - Historic Preservation-related
Organizational Development

### ABSTRACT / PURPOSE OF PROJECT
*Character Limit: 2000*

### APPLICANT INFORMATION / ELIGIBILITY
#### Choices
If non-profit, State of Ohio Nonprofit Entity Number recorded. "Active" status required.
If 501(c)(3), IRS Letter of Determination attached, can open, and legible
EIN submitted (required for Public entity)
Public entity (e.g. unit of local government, public library, etc).

### Comments - Applicant Information / Eligibility
*Character Limit: 2000*

### PROJECT NARRATIVE - Required items provided
We use his section is to track whether applicants provided the attachments required and make other relevant notes. The section is not a proofread or line edits of the narrative.

#### Choices
If Bricks & Mortar project, the structure is on the NRHP or is designated by local ordinance (CLG).
NR reference number or other legal proof of historic designation provided.
If Bricks & Mortar project and NOT on NRHP, structure to be used for collections care.
Work Schedule Includes State-End Dates. Mid- and Final Project Report dates optional
If required, Work Schedule has dates for Request for Proposal.

Photographs uploaded and legible.
Statements of Qualification / Resumes legible.
If required, Letters of Commitment attached and legible.
If Ohio History Connection site partner, current site agreement attached and legible.

## Comments - Project Narrative

Purpose of project, additional notes

*Character Limit: 2000*

## BUDGET - Required items provided

### Choices

Budget Form attached and can open
Project director in budget (required)
Project bookkeeper in budget (required)
If Bricks & Mortar project, Construction Budget Form completed
Cost Estimates attached (not required). Can open? Legible?

## Comments - Budget

- Grant Request?
- Match Amount?
- Total Project Cost?
- Match Percentage?

- What is the History Fund asked to pay for?
- RFP required?

*Character Limit: 2000*

## GRANT PROJECT DATA

If data recorded in this section differs from that in Budget Form, the data in the Budget Form will be used.

### Choices

Grant Request amount same as in project budget
Match amount same at budget
Percent match same as budget
Total Project Cost amount same as budget
Calculation of percent correct
Project Start Date after May 1

## Comments - Grant Project Data

*Character Limit: 2000*

## ELECTED OFFICIALS - SIGNATURES - IRS FORM 990 - PROJECT AUTHORIZATION

### Choices

U.S. House of Representatives Member Name / District indicated (not U.S. Senator)
Signatures of Authorization form attached and can open
Project Bookkeeper DIFFERENT than Authorizing Official and Project Director
If 501(c)(3), 990 attached, can open, and legible. (Only Parts I - XII of long form 990 required).

## Comments - Elected Officials, Signatures, IRS Form 990

*Character Limit: 2000*

## Application Status

### Choices

Application Complete
Application Not Complete / Contact Applicant / Return to Draft
Application Tabled b/c Ineligible

## Additional Comments

Eg. Dates of contacts. OHC division / department review assignments..

*Character Limit: 10000*

# *Staff Review Comments*

**INSTRUCTIONS**

***Thank you*** for sharing your expertise as a staff reviewer for the Ohio History Fund. The program has a three-stage review process, and you are a part the second stage. The first stage is the Ohio History Fund's "technical review." The third stage is review by our panel of outside experts.

It is the responsibility of our outside expert review panel to make funding recommendations to the executive director. **Your responsibility** as a staff reviewer is not to make recommendations for funding, but instead to provide context upon which our panelists rely. It is very important to make objective critiques of applications. Our review panel members use your comments to form their recommendations.

Use the questions below to guide your review and refer to the History Fund's *Grant Guidelines* and *Application* found here. Note the strengths and shortcomings the proposal. Share shortcomings in the spirit of offering constructive, helpful feedback. Comments **will be shared** with applicants. Names and affiliations of reviewers **will not** be shared.

If you have additional questions, please contact Andy Verhoff, State Historic Preservation Office, 614-562-4490 (cell); 614-297-2341 (office): or averhoff@ohiohistory.org. ***Thank you again!***

## 1) Statement of Need*

- Is it clear what this project will accomplish? Why or why not?
- Why is the historical information this project would preserve and/or disseminate important? **Or, if this is an Organizational Development proposal**, will the project enable the applicant to better achieve its mission?
- How compelling is the need for this project at this time?

*Character Limit: 1500*

## 2) Description of Impact*

- How well will the project serve the audiences identified in the application?
- How clear are the measures for evaluating the project?

*Character Limit: 1500*

## 3) Project Design & Resources*

- How well can project be accomplished with the staffing, budget, and schedule proposed?

*Character Limit: 1500*

## 4) Professional Standards*

- How well would the project apply professional standards and best practices for the relevant field(s)? Which ones? For the standards and best practices that the Ohio History Fund recommends to applicants, go the History Fund *Guidelines* here and see the section called "Apply Professional Standards & Best Practices"

*Character Limit: 1500*

## 5) Other Comments

Please share any additional comments that would be helpful other reviewers and the applicant.

*Character Limit: 1500*

# *Panel Review*
# Sample Reviewer Form

# History Fund 2024-2025 (FY25)

*Ohio History Connection*

## *Project Name*

**Project Name**
*Character Limit: 100*

## *Panel Reviewer Comments & Scoring*

**INSTRUCTIONS**

**Thank you** for serving as a review panelist. You will evaluate applications using criteria outlined in the the *Ohio History Fund Grant Guidelines*. To check the completeness of an application, see the *Grant Submission Check List*.

Click here to access the *Guidelines*, *Check List*, and all application materials.

In the "Comments & Score" areas below...

- Use the questions in each section to guide your comments.
- Note the strengths and shortcomings the proposal. Share shortcomings in the spirit of offering constructive, helpful feedback.
- Award points by section and record point totals at the end, where indicated.
- Scores are based on a 100 point scale. See the bottom of this form for explanations of scoring ranges (100-90 points, 89-80, 79-70, 69 and below).
- Comments and scores should align. It's confusing when a reviewer only praises a project, offers no constructive criticism, and then gives the application a low score.

Comments and scores **will be shared** with applicants. Names and affiliations of reviewers **will not** be shared. The highest scoring projects will be recommended for funding. Projects may receive full or partial funding.

**Conflict of Interest Policy**
Care has been taken to avoid conflicts of interest or the appearance of conflict of interest among review panelists, the grants under review, and the Ohio History Connection. See the History Fund's Conflict of Interest Policy for situations in which such a condition exists.

- If a conflict does exist, write "*recuse*" in comments sections of this form. Do not numerically score the application.

## STATEMENT OF NEED (0 - 25 points):*

- Is it clear what the project will accomplish? Why or why not?
- Why is the historical information this project would preserve and/or disseminate important? **Or, if this is Organizational Development proposal,** will the project enable the applicant to better achieve its mission?
- How compelling is the need for this project at this time?

COMMENTS & SCORE (0-25):

*Character Limit: 2500*

## DESCRIPTION OF IMPACT (0 - 25 points):*

- How well will the project serve the audience(s) identified in the application?
- Are the measures identified for evaluating the project suitable? Why or why not?

COMMENTS & SCORE (0-25):

*Character Limit: 2500*

## PROJECT DESIGN & RESOURCES (0 - 40 points):*

- How well are the activities and schedule suited to accomplishing the project?
- How well would the project apply professional standards and best practices of field(s) relevant to this project? Which standards/best practices? For standards/best practices recommended by the Ohio History Fund see the section titled "Apply Professional Standards & Best Practices" in the Guidelines here.
- Does the proposal identify qualified people to execute the project, or indicate that qualified people will be hired? Why or why not?
- Is the budget realistic? Are sources of funding clearly articulated? Do the budget and project narrative support each other? Why or why not?

COMMENTS & SCORE (0-40):

*Character Limit: 2500*

## ACCURACY & COMPLETENESS OF APPLICATION (0 - 10 points)

- The comments and scores in this section will help panelists break tie scores among applications. Otherwise strong applications that also show excellent attention to detail should prevail.
- Does the application seem complete and accurate overall? Why or why not?

COMMENTS & SCORE (0-10):

*Character Limit: 2500*

## ADDITIONAL COMMENTS (Optional):

*Character Limit: 2500*

## TOTAL SCORE:*

***Total Score* = Statement of Need *score* + Description of Impact *score* + Project Design & Resources *score* + Accuracy/Completeness of Answers *score*** (4 numbers comprise the Total Score)

This score sums up your individual evaluation of this proposal at this time, but are not considered your final scores. Later, you and the other reviewers who read this application will determine its final score and ranking for funding during review panel meetings. In these meetings you will have the opportunity to revisit and, if desired, revise the score you assigned.

**Explanations of Scoring Ranges:**

- **100 - 90 points** - application is strong in all areas, excepting a few minor concerns. The need for the project at this time is compelling, its impact is clear, and the project design is well thought out. The application is complete and accurate.
- **89 - 80 points** - application is strong in most areas but not all. The need for the project is clear, but not strongly compelling at this time. The project's impact could be clearer. The project design is understood, but there are minor gaps in the plan. The overall content and accuracy of the application is suitable, despite minor concerns.
- **79 - 70 points** - the statement of need and description of impact are somewhat clear, but additional explanation in these areas would make the application more persuasive. Gaps in the project design and/or persistent concerns about the overall content and accuracy of the application make it less competitive.
- **69 points and below** - the following are not clear and require further explanation before the application can compete more robustly: statement of need, description of impact, and/or project design/resources/budget.

*Character Limit: 100*