Welcome!

Healthy Marriage and Relationship Education Grants

Discretionary Grant Review General Session

U.S. Department of Health and Human Services
Administration for Children and Families
Office of Family Assistance
FY 2015

We appreciate your patience as our presenters join the webinar.
This webinar is being recorded.

All attendee lines are muted.

If you have any questions during the webinar, you can enter your questions into the “Questions” pane.

Should you need technical support, please contact us at WebinarTech@ReviewOps.org.
Agenda

- Office of Family Assistance Overview
- Grant Review Basics Training Refresher
- FOA Highlights and Assessing Applications
- Application Review Module
- Logistics
- Chairperson Guidance
The OFA administers several key federal grant programs, including the Temporary Assistance for Needy Families (TANF) program and the Tribal Temporary Assistance for Needy Families (Tribal TANF) program.

OFA also administers three discretionary grant programs—Healthy Marriage and Responsible Fatherhood (HMRF), Tribal TANF Child-Welfare (TT-CW), and Health Profession Opportunity Grants (HPOG).
• **Healthy Marriage and Relationship Education:** Supports organizations to provide comprehensive healthy relationship and marriage education services, as well as job and career advancement activities to promote economic stability and overall improved family well-being.

• **Responsible Fatherhood:** Supports organizations to provide comprehensive activities to help fathers become better parents, improve relationships with their spouses, significant others and/or mothers of their children, and contribute to the financial well-being of their children by providing job training and employment services.
Healthy Marriage and Relationship Education Grants’ Funding Opportunity Announcement (FOA)

- A published form of guidance for potential program applicants
  - provides program history, formatting and other eligibility requirements
  - provides an outline of content and program description elements
- The official Guidance for application review and assessment
- All Grant Review Participants (Chairpersons, Reviewers, SAMs and PAMs) must read
Healthy Marriage and Relationship Education Grants

• Healthy Marriage and Relationship Education Grants (HMRE) will support programs that provide a broad array of services designed to support healthy marriage and relationship education and skills development, and promote economic stability and mobility.

• Applicants were encouraged to develop program designs that combine any of the eight specified activities, or the elements listed in them, (See Section I., Statutory Authority) to achieve ACF programmatic outcomes.
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Understanding the Remote Review Process: Panel Dynamics and ARM

Reviewers’ Scores and Comments are Submitted to the Chairperson

Panel discussions held to review discrepancies/variance in scores amongst Reviewers

SAM Tier 1 Panel Manager/ Monitor (authorizing federal employee)

Reports Rejected by the SAM will repeat the Panel cycle

Final Summary Reports are Approved by the PAM

Reports Rejected by the PAM will repeat the Panel cycle

Continuous Panel Monitoring Via ARM Provided by F2
Panel Review Process

• All panelists read the entire FOA thoroughly.
• All panelists carefully and thoroughly read each application.
• All reviewers enter initial scores and comments for every criterion into ARM and submit them to the Chair.
• Any scores or comments that do not meet requirements must be rejected by the Chair and sent back to reviewers for revision.
• The Chair reviews scores and comments in preparation for the discussion.
• The full panel meets and discusses each application.
Panel Review Process (cont.)

• Following the panel discussion, reviewers revise their scores and comments to reflect the panel consensus and re-submit them to the Chair.
• The Chair compiles the panel summary report from the reviewers comments, summarizing similar comments from reviewers, and ensuring that the summary report reflects the panel consensus.
• The Chair submits the summary report to the SAM.
• The SAM can submit the summary report to the PAM for approval or reject it.
• The PAM reviews the summary report, rejecting those that do not meet the requirements. The Chair and the reviewers may have to make revisions if the report is rejected.
• When the summary report is acceptable, it is approved.
Consensus

• Where differences of opinion about an application exist among reviewers, the panel Chair and reviewers will discuss the reasons for these differences and seek consensus.

• A wide point spread indicates that there are conflicting views regarding whether the applicant has successfully addressed the criterion, and thus a lack of consensus.

• If there is disagreement regarding whether or not there are any strengths or weaknesses for a particular criterion and some reviewers have awarded zero or full points while others have awarded partial points, there is not yet consensus.

• Contradictory strength and weakness comments are also indicative of a lack of consensus.
Consensus (cont.)

• Reviewers do not have to award the same score as each other for each criterion, but there should be a general agreement on the strengths and weaknesses in each area.

• Chairs facilitate the panel discussion and encourage movement toward consensus. Reviewers must also work with each other to reach consensus.

• After the panel has arrived at consensus, reviewers are required to revise their comments and scores accordingly and re-submit them to the Chair.

• The Chair will then compile the panel summary report, which represents the panel's consensus through compiled and summarized reviewer comments (strengths and weaknesses) and the compiled scores.
Writing Evaluative Comments
How Your Comments and Scores are Used

• As an element of the federal decision-making process. Comments support the Agency’s funding decisions, and serve as a basis for having made those selections.

• To inform applicants of ways to improve future submissions. Assists applicants (particularly those that are unsuccessful) by providing meaningful feedback on their application’s content.
What is an Evaluative Comment?

Evaluative comments assess the value, worth, or quality of each part of an application. They clearly describe the strengths and weaknesses of an application, and justify the scores given to an application.
Guidelines for Writing Evaluative Comments

• Comments must clearly describe each section of the application as it relates to the criteria, and why it is a strength or a weakness, so that a person reading your comments should understand the full story of what the applicant is proposing to do and how it meets or does not meet each of the criteria.

• Comments must address all elements included in each review criterion, and should not skip over criteria or sub-criteria. If the application is completely unresponsive to either (for example, if they don’t include any budget or budget justification), then reviewers must address the absence as a weakness.
Guidelines for Writing Evaluative Comments (cont.)

• Comments must clearly justify the scores given to an application.
• Comments must provide an example to support the comments and scores given, citing the rationale and evidence that the application provides.
• Comments must be specific, accurate, detailed, and thorough.
  – Use appropriate descriptors for strengths, such as detailed, complete, feasible, qualified, and thorough.
  – Use appropriate descriptors for weaknesses, such as ambiguous, contradictory, inadequate, incomplete, and lacking evidence.
  – Always use complete sentences, proper grammar, and correct spelling.
• Every comment must include a page number citation (or specific page/section reference, e.g., Appendix X, Y, or Z).

• When referencing the page number, the reviewer must use the applicant numbered page of the application itself rather than the system generated page number.

• If an applicant fails to address any particular criteria, the panel report must state: No page found.
• Do not simply restate what the applicant has written. Evaluate what it says by assessing the significance and quality of the rationale and evidence provided.

• Each comment must either be a strength or a weakness. An individual comment can never be both.

• Do not allow words that imply contradiction (But, yet, although, however, nonetheless, on the other hand…).

• Strength and weakness comments can never conflict with each other. If part of an application has both strengths and weaknesses, you must write a separate comment for each (under the appropriate heading), and they must be carefully written so as not to conflict with each other.
Guidelines for Writing Evaluative Comments (cont.)

• Do not compare the application to any other application. Evaluate it based solely on the criteria in the FOA.

• If the criteria is addressed anywhere in the application, the reviewer must give the applicant credit, even if it's in the wrong place.

• Make comments tactful and constructive.

• Do not provide advice or opinions on how to improve an application.
Sample Comments
Project Approach

Strength:
• **Unacceptable:** The applicant provided a description of its five-year program design. (Page 33).

• **Acceptable:** The applicant provided a detailed, five-year program design, which lists the goals, objectives, timelines, lead agencies, collaborating partners, and fiduciary responsibilities that closely aligns with its needs and available resources. For example, the applicant includes an MOU with a local domestic violence agency, which details the specific roles and responsibilities of each party, including staff training, intervention, and referral services for the full five-year project period (Page 33).

Weakness:
• **Unacceptable:** The applicant’s method for determining outcomes and expected benefits is poor (Page 20).

• **Acceptable:** The applicant’s method for determining outcomes and expected benefits lacks specificity. For example, no methods are presented for evaluating “improved healthy relationship and marriage skills” (Page 20).
Sample Comments
Organizational Capacity and Experience

Strength:

- **Unacceptable**: Position descriptions, consultant qualifications, management plans, and resumes of all key positions were presented. (Appendix C).

- **Acceptable**: Position descriptions, consultant qualifications, management plans, and resumes of all key positions were presented. This information clearly demonstrates that the key staff and consultants have the knowledge, skills, and experience necessary to meet the project’s goals and objectives and to implement the activities presented. For example, the Project Director has an MSW and 20 years experience in program oversight and management (Appendix C).

Weakness:

- **Unacceptable**: The applicant does not describe its organizational capacity to manage a project of this scope and nature. (Pages 5-8).

- **Acceptable**: The applicant does not describe any past or current initiatives that demonstrate its organizational capacity to manage a project of this scope and nature. The failure to provide this information makes it difficult to determine if the outcome of this project is likely to be successful (No page found).
Sample Comments
Performance Measurement and Data
(Mixed Strength/Weakness Statements)

Strength:
• Unacceptable: Even though the applicant does not include all three required statements, they do submit two, which represents at least a majority compliance with the requirement.
• Acceptable: The applicant submitted three written statements that affirm their commitment with regard to data and evaluation. For example, the applicant separately addresses each statement specifically and includes a description of its strategy to hold partnering organizations accountable (Pages 35-36).

Weakness:
• Unacceptable: The applicant does submit two commitment statements, but does not include all three.
• Acceptable: The applicant failed to submit each of the three statements affirming their commitment to data and evaluation as required (No page found).
Performance Measurement and Data (cont.)

Sticking to the evaluation criteria

Weakness:
• **Unacceptable:** The applicant includes the lead local evaluator’s CV, but does not include CVs for other lead staff in the evaluation (Pages 39-40). [Note that the FOAs only require CV for the lead evaluator.]

• **Acceptable:** The applicant includes all components related to a local evaluator, including a signed letter of agreement with a local evaluator (Pages 39-40).

Clear, concrete statements

Weakness:
• **Unacceptable:** The applicant’s local evaluation plan is vague and unclear. It does not discuss what exactly is envisioned (Pages 34-37).

• **Acceptable:** The applicant’s local evaluation plan fails to address the research design and sample, and sample size, as required in the Evaluation Criteria (Pages 34-37).
Sticking to the evaluation criteria

Weakness:
- **Unacceptable:** The applicant includes resumes for key staff, but does not include job descriptions for all staff (Pages 39-43). [Note that the FOA only requires job descriptions for *vacant* positions.]
- **Acceptable:** The applicant includes all resumes for key positions and the job description for the Senior Case manager, which has not been hired yet. (Pages 39-43).

Clear, concrete statements

Weakness:
- **Unacceptable:** The applicant’s logic model is vague and unclear. It does not discuss what exactly is envisioned (Page 34).
- **Acceptable:** The applicant’s logic model fails to make a clear connection between the projects goals, inputs, outputs, and outcomes. For example, the logic model does not reference any one of the ACF desired outcomes (Page 34).
Sample Comments

Project Management and Staffing

(Cutting/Pasting)

Strength:

- **Unacceptable**: The applicant’s capacity and experience to adequately develop, oversee, manage, staff, and comply with all aspects of healthy marriage and relationship education program was reviewed and assessed by the criteria included in the FOA (Throughout application) [This example is excerpted from another FOA’s Project Management and Staffing criteria].

- **Acceptable**: The applicant’s capacity and experience is well documented. For example, the applicant describes prior, relevant experience in oversight and management of comparable services—having provided relationship skills training and subsidized employment services to young adults aged 18 to 24 who were formerly in the foster care system. The organizational structure clearly delineates lines of authority, including its representation that facilitators and case managers work collaboratively to develop a service plan for participants (Pages 16-19).

Weakness:

- **Unacceptable**: The applicant does not include detailed information about collaborations, partnerships, and signed MOUs (or third-party agreements) with organizations and stakeholders that the applicant indicates will be responsible for aspects of the program, will serve as sources of participant recruitment, or will provide services to program participants on a referral basis (No page found) [This example is excerpted from the FOA's Project Approach criteria].

- **Acceptable**: The applicant does not include MOUs as required. For example, there is no MOU for the domestic violence agency identified as providing services, nor is there a letter of intent to enter into an agreement in lieu of the MOU (No page found).
Sample Comments
Budget and Budget Justification

Strength:
- **Unacceptable**: The funds requested are reasonable. (Pages 15-29).
- **Acceptable**: The funds requested are reasonable and clearly relate to the proposed services and activities and align with allowable activities described in the FOA. For example, the line-item budget justification specifically allocates all travel costs for five staff attending the entrance meeting, as well as costs for a curriculum, and training for facilitators (Pages 15-29).

Weakness:
- **Unacceptable**: The applicant does not describe its financial relationships with its partners. (Page 18).
- **Acceptable**: The applicant does not describe the contractual relationship with ABC Webmasters, which is mentioned as responsible for overseeing development of the National Center website. For example, there is no description of which staff will oversee “ABC’s” daily operations or how the applicant will hold the contractor accountable for compliance with federal financial management principles. (Page 18)
Sample Comments

Bonus Points

Comparing Applications

Note. To be a Strength and receive the 5 points, all criteria and sub-criteria under the Bonus Points section must be met. No partial points.

Weakness:

• **Unacceptable:** The applicant’s local evaluation plan is not as complete and comprehensive as other evaluation plans reviewed. For example, it does not include as extensive detail on why the proposed research design is appropriate. (Pages 39-40) [Note: reviewers must not assess or score one application against another].

• **Acceptable:** The applicant’s local evaluation plan does not include the detail required in the evaluation criteria. For example, the plan does not justify why the proposed research design is best-suited to answer the research questions (Pages 39-40).
General Tips

• Use spell check!

• After you’ve written your comments and put them into ARM, take a short break, and then take the time to read and edit what you’ve written before submitting them.

• If you’re writing comments in Word or similar program, you can Copy and Paste them into Notepad before you Paste them into ARM to remove unwanted characters or formatting.
Healthy Marriage and Relationship Education Grants’ Scoring and Criteria

Putting It All Together

Criteria

Across
1. meaningful assessment
6. knowledge skills abilities

Down
1. reasonable income and expenditure
2. staffing and oversight plan
3. going above and beyond
5. achieving project objectives

bud
g
evaluation
m

n
p
r
s
t
apacity
ent

1. reasonable income and expenditure
2. staffing and oversight plan
3. going above and beyond
5. achieving project objectives
Scoring Instructions

• Read the entire FOA, especially the Program Description (Section I.), The Full Project Description (Section IV.2), and the Application Review Information (Section V.1. Criteria).

• The Program Description provides an overview of the Healthy Marriage and Relationship Education Grants, and describes ACF’s expectations. **This overview is very important, since it is incorporated by reference into the scoring criteria.**

• Panels should score the application according to the criteria found in the Application Review Information section of the funding opportunity announcement, **and nothing else.**
Scoring Instructions (cont.)

• Never contact the applicant or any other outside source. Do not use the internet or any external source of information, except to read the links in the funding opportunity announcement.

• If you have any personal bias for or against the applicant, let us know before the panel starts reviewing the application, and we will move it to another panel.

• Each reviewer must provide their own scores and comments for each criterion for every application assigned.

• Do not discuss the application with anyone other than your panel, your SAM/PAM, and if necessary the Panel Review Manager.
Each criterion has a specified point range.

The FOA’s Criteria instructions states that: “The number of bulleted statements under each review criterion does not necessarily reflect an equal distribution of points among corresponding point values. The entire application will be reviewed and evaluated.”

Reviewers must consider the balance of strengths and weaknesses of the application, the relative importance of each, and determine what score they believe is appropriate.

Every score must be fully supported and justified by detailed written evaluative comments.
Scoring Instructions (cont.)

• Since all scores must be supported by evaluative comments, if there are any strengths identified, the corresponding score **cannot be zero**. If there are any weaknesses identified, the maximum score **cannot be given**.

• As stated in the FOA, “Points will be allocated based on the extent to which the application proposal addresses each of the criteria.”

• SAMs, PAMs, and Chairs may not provide advice to reviewers regarding what a score should be. Reviewers must refer back to the criteria in the FOA, and ensure that all of their scores are fully and reasonably supported by evaluative comments.

• If a score is not sufficiently supported by comments, return the application to the panel with appropriate instructions.
### FOA Section V.1 – Criteria for HMRE

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<th># of Sub-Criterion</th>
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Glossary: Criteria Headings, Introductory/Explanatory Statements, Criteria, and Sub-criteria

Criteria Headings – There are six overarching criteria categories:

– Project Approach
– Organizational Capacity and Experience
– Performance Measurement Data and Evaluation
– Project Management and Staffing
– Budget and Budget Justification
– Bonus Points

Introductory or Explanatory Statements – All bold text under each heading and preceding bullets. [Note: there may be multiple statements under any heading]. The following example is from Project Approach:

The applicant’s overall program design, approach, and ability to provide required services adequately will be reviewed and assessed by the following criteria.
Criteria – The **bulleted items** under each introductory/explanatory statements and/or sub-titles. The following example is from *Performance Measurement Data and Evaluation*:

(Criteria example)

- The applicant affirms a commitment to document, store, and report on performance using the full set of uniform measures to be provided by ACF and using nFORM and the ACASI on-line applicant characteristics and pre- and post-tests.
- The applicant affirms a commitment to conduct a local evaluation.
- The applicant affirms a commitment to participate in all aspects of any federally sponsored evaluation as a condition of acceptance of funding, and indicates that they will be responsible for ensuring that partnering organizations comply with the condition of award, as detailed in the FOA.
Sub-Criteria – The *indented bullets* that follow the criteria. The following example is from *Organizational Capacity and Experience*.

- Demonstrates the organizational capacity necessary to oversee federal grants through a description of the organization's fiscal controls and an explanation of the organization's governance structure, including:
  - *(Sub-criteria)* an organizational chart that demonstrates the relationship between all positions (including consultants and/or subcontractors) to be funded through this grant; and
  - *(Sub-criteria)* a clear description of the applicant’s financial management experience, and evidence of an adequate records system that will allow for effective control over and accountability for funds.
1. There are five introductory or explanatory statements under this heading, each with supporting criteria.

2. The second statement and criteria **only apply** to applicants that include economic stability and mobility services:
   Applicants that propose to provide economic stability and mobility services will have the thoroughness of that plan reviewed and assessed under the following criteria. *(Reviewers will not deduct any points if this option is not selected. The maximum points under Project Approach if the option is proposed will remain 35 points.)*
   **Note:** inclusion is optional; no points deducted if not included.

3. The fourth statement and criteria **only apply** to applicants that determine that case management is unsuited to their target population.
   Applicants that determine that case management and program supportive services are not suited to their proposed program design will be reviewed and assessed by the following criterion:

4. The remaining statements and criteria will apply to **all** applicants.
Remember: The Project Approach criterion is multi-faceted and includes, but is not limited to, the following components of the Full Project Description:

- Overall Program Design (including outcomes expected and logic model)
- Table of Contents
- Project Summary/Abstract
- Objectives and Need for Assistance
- Approach
  - HMRE activities and elements
  - Curricula
  - Economic Stability and Mobility (optional)
  - Intake and Enrollment Process
  - Case Management (including, whether it is not suited to target population)
  - Program Supportive Services (including, addressing un-fundable service provision)
  - Partnerships and Program Collaboration
  - Domestic Violence Requirement
  - Child Maltreatment
- Other (standard elements) - e.g. target population, project timeline and milestones, geographic location, post-award requirements (including written certification and assurances statements, and MOUs), etc.
Organizational Capacity and Experience
Max 20 Points – Page 46

Ability to develop, manage, and oversee program and partner organization with regard to fiscal management/control, organizational structure, and efficient and effective HMRE service provision.

Submission Requirements (FOA, Page 33):
• For applicant organization
  – Must adhere to submission requirements, as applicable.
  – May consider descriptions or abbreviated reports, in lieu of statements or reports.
• For “cooperating partner” organizations
  – OFA waived the submission requirements as they apply to partner or collaborating organizations only.
  – MOU or other third-party agreement may be submitted for each partner instead.
  – Letter of Intent to enter into MOU or third-party agreement, or contractual agreements may be submitted in lieu of MOU.
  – **Rationale:** these alternative documents adequately represent the applicants due diligence in vetting proposed partners.
Performance Measure Data: Applicants are expected to describe (and subsequent Grantees are required to implement) how they will:

- Collect, store, and report data on **standardized performance measures**.
- Obtain and maintain data in the Management Information System (MIS) developed by ACF: this system is called the “Information, Family Outcome, Reporting, and Management” system, or simply, **nFORM**.
- Ask participants to complete applicant characteristics survey, and pre- and post-test surveys, via an Audio-Computer Assisted Self-Interview, or **ACASI enabled online surveys** on a computer or a specified tablet.
Local Evaluations: Applicants are expected to propose to conduct a grantee-specific evaluation, referred to in the FOA as a “local evaluation,” conducted by an independent evaluator, or “local evaluator.”

- Applicants must **justify their local evaluation design** per research question(s).
- Applicants may propose **a descriptive or impact design**.

Federally-led Evaluations: IF SELECTED, all grantees are **required to participate** fully in ACF-sponsored evaluations and adhere to all evaluation protocols established by ACF and designated contractors.
1. **Commitments to Data and Evaluation**: 0 or 3 points for the extent to which the applicant's plan addresses three commitments. Applicants that do not positively affirm all of the following three commitment agreements will not receive any of the 3 points available for this area:

1. Document, store, and report on performance using the full set of uniform measures and using nFORM and the ACASI surveys

2. Conduct local evaluation

3. Participate in federally-sponsored evaluation
0-12 points (applied to Performance Measurement Data and Local Evaluation combined)

2. **Performance Measurement Data:**
   - Collect data in a uniform, systematic manner while maintaining participant privacy
   - Consistent with the scope of the data collection effort
   - Staff readiness
   - Involving partners
   - Rigorous process for completing surveys
   - Detail about the staffing, training and resources to monitor and report
   - Consultation with stakeholders
   - Planning period
0-12 points (applied to Performance Measurement Data and Local Evaluation combined)

3. **Local Evaluation Plan:**
   - Consistent with all components described in *Section IV.2. Project Description, Funded Activities Evaluation Plan*
   - Detail on how they will accomplish successful study on specific research question(s)
   - Describes the research question(s), research design, sample and sample size, and data collection (including measures)
   - Plans for training data collectors, and for checking data
   - Inform future programming and expand the evidence base
   - Analyses will support final reported results, and dissemination
   - Planning period
   - Local evaluator (signed letter of agreement; understanding of potential federal evaluation)
   - Securing informed consent (where appropriate); working with a named IRB
   - Input from partners
Assess program development and oversight, including:

- Project management
- Staffing plan, including hiring key staff with requisite qualifications and capabilities
- Staff training
- Monitoring and **direct** oversight of partners and ensuring their compliance
- Strength of partner relationships (e.g., through MOUs, contracts, or other third-party agreements)
- Substantial involvement of the applicant organization*
- Written assurances and certifications of applicant’s adherence to allowable activities and commitment to non-supplanting other funding streams
1. There are four sub-titles, all for a combined total of 15 points.
2. The fourth sub-title, *Subsidized Employment*, applies only to applicants that include this option. No points deducted for non-inclusion.
3. The budget and budget justification must cover all aspects of program for the full five-year project period. There must be:
   - One 424A with multi-year breakout that includes projected allocations for each of the five years; and
   - One line-item budget and one budget justification with a multi-year narrative that also includes projected allocations for each of the five years
For applicants that propose local evaluations that are impact evaluations with an RCT, or randomized controlled trial, design.

0 or 5 points. Only those applicants meeting all criteria will receive bonus points. **There will be no award of partial points.**

(1) *RCT-relevant research question*
(2) *Random assignment:* method/timing; comparability of groups
(3) *Sample:* unit of analysis; sample size; promoting participation
Assessing Applications for Compliance with FOA Criteria

- Each criteria includes multiple sub-criteria, all of which must be addressed.
- Some sub-criteria are multifaceted, and may require several different elements, or may list several options.
  - Where you see the words “and” or “including” within the sub-criteria, it signifies multiple parts, and each part must be addressed.
  - Where you see the words “or” or “may include” it signifies an option to address one or more parts. But not all parts are required.
Helpful Questions for Assessing an Application

• Is the applicant responsive to the different FOA published evaluation criteria statements? Does the applicant provide detail to justify how they meet the evaluation criteria?

• Is the applicant’s proposal clear? Does the applicant present a sound strategy? Are there any challenges, such as over ambitious scope, lack of expertise, underestimated costs, staffing issues, or lack of needed partnerships?

• Do the ideas presented flow logically?

• Are the activities outlined in different sections of the application consistent? For example, do the activities listed for the program correspond with funding amounts in the budget.
QUESTIONS?
PLEASE NOTE: The Application Review Module (ARM) is a system that is designed as a shared service and is maintained by the Grants Centers of Excellence for multiple federal agencies. As a result, instructions are written to be general in nature and not reflective of any specific agency policy. Users should follow their own agency’s policies and procedures with regards to the processing of grant reviews.
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About ARM

ARM is a web-based application used to assist the Federal grant application reviewing process. It provides a user-friendly environment to facilitate the grant review process while allowing reviewers to participate from remote locations.

- The primary users for ARM are the Reviewer, Chairperson, Secondary Area Manager (SAM), and Federal Program Area Manager (PAM).
Accessing ARM

You will be provided a Username and Password as well as the link to the website prior to your review.

1. Enter your *username* and *password* in their appropriate boxes and click the **Login** button.  
   *Note: Usernames and Passwords are case sensitive.*

   - Reviewers and Chairpersons will log into the ARM in the same manner. Your username and password will only provide you access to the role and panel applications to which you are assigned.
Starting the Review

Accessing Your Applications

2a. Select Your Session
If you are participating in multiple reviews, you will need to select the session you would like to work on. Click on the link to select your session.

2b. Select Your Panel
Click on the number of your panel which is a link to select your panel.

Note: If the “Program Support Site” column has a Go to Site link visible, clicking on the link will open an outside website in a new window.
Starting the Review

Application Selection Screen
This screen displays six major identifiers of the application.

- Application Number
- Application Name
- Status (see p. 24)
- Total Score, if applicable
- Scores Entered
- Comments Added
- View Application PDF File (optional)

Applications which have not been accessed will remain in a “Pre-Review” status.

3. Click on the hyperlinked Application Name to advance to the Application Evaluation Screen and begin your review.

Note: In the score column, if the score shown is -- you have not entered any scores for this application. If an * is present next to the score, you have not entered all of the individual scores required for this application.
Starting the Review

Application Selection Screen - Understanding Your Progress

- The column titled “Scores Entered” shows how many scores have been entered out of the total amount of criteria for that application.

- The column titled “Comments Added” will list the number of comments (strengths and weaknesses) that have been entered for that application.

<table>
<thead>
<tr>
<th>Application Number</th>
<th>Application Name</th>
<th>Status</th>
<th>Total Score</th>
<th>Scores Entered</th>
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<tr>
<td>AIP-1001</td>
<td>Birmingham-Shuttlesworth International</td>
<td>Submitted to Chair</td>
<td>89</td>
<td>4 / 4</td>
<td>3</td>
<td>Open PDF</td>
</tr>
<tr>
<td>AIP-1002</td>
<td>Ted Stevens Anchorage International</td>
<td>In-review</td>
<td>--</td>
<td>0 / 4</td>
<td>0</td>
<td>Open PDF</td>
</tr>
<tr>
<td>AIP-1003</td>
<td>Phoenix Sky Harbor International</td>
<td>Pre-review</td>
<td>--</td>
<td>0 / 4</td>
<td>0</td>
<td>Open PDF</td>
</tr>
<tr>
<td>AIP-1004</td>
<td>Jackson-Evers International</td>
<td>Pre-review</td>
<td>--</td>
<td>0 / 4</td>
<td>0</td>
<td>Open PDF</td>
</tr>
<tr>
<td>AIP-1008</td>
<td>Newark Liberty International</td>
<td>Submitted to Chair</td>
<td>85</td>
<td>4 / 4</td>
<td>3</td>
<td>Open PDF</td>
</tr>
</tbody>
</table>
Application Evaluation Screen

This screen serves as the primary control panel for evaluating that particular application. All applications will be scored by individual criterion.

- The scoring criteria are listed in the first column.

- The middle column is where you will click to enter your scores. The scores will automatically total as you move through the criteria.

- The last column is where you will be able to click and enter comments after you have entered scores.

Note: The application will remain in an “In-Review” status until you have completed your initial review.
**Application Evaluation Screen**

**View Full Criteria Descriptions (if applicable)**

If the review criteria were setup with detailed descriptions, you may view them by clicking on the hyperlinked header **Criteria**.

- Clicking on the header **Criteria** will open a new window with the full descriptions visible.

- You may keep this window open in the background and reference it if you need to.
Application Scoring

First, users must enter a score, before any comments can be entered.

4. In the Score column, click on the hyperlinked -- to begin scoring the application.

5. Using the drop-down arrow, select the appropriate score by clicking on the number.

6. Click Submit.

Note: You will not be able to select a score greater than the maximum defined by the criterion.
Application Evaluation Scoring

Entering Multiple Scores At Once

- If you would like to enter all of your scores at one time, click on the hyperlinked column header **Score**.

- The full Add Scores screen will open, and you will be able to click on the drop-down arrow for each criterion and assign a score.

- You may also view the full descriptions of the criteria by clicking on the **Show Criteria** link at the criterion level OR you can view all of the descriptions for all of the criteria by clicking on the header **Show All Descriptions**.

- When you have entered all of the scores, click **Submit**.
Entering Comments

Only after you assign a score to an individual criterion can you include corresponding comments.

7. Click on the hyperlinked word Comment to write a comment for the respective criteria.

- Again, as seen in the image, the only activated Comment links are those with a corresponding score. The link will automatically appear once you have scored the criterion.

Note: If you have not entered all required scores for an application, your Actual Score will be followed by an * indicating that your scoring is not complete.
Application Evaluation Comments

Entering Comments

Clicking the **Comment** link will open the Comments window.

8. Click on the drop-down arrow to open the menu. Select whether your comment is a “Strength” or a “Weakness”

9. Enter a page number or any page identifying information.

10. Enter your comment. You can type directly into this field or copy and paste from a word processing program. **After entering the comment it is strongly recommended that you Spell Check your work by clicking on the Spell Check button.**

11. Click **Submit** to finalize your comment as part of your evaluation.
Session Time-Outs and Preventing Data Loss

Session Time Out

- In order to provide maximum data security, the ARM system sessions are designed to “Time-Out” after 30 minutes of inactivity. After 25 minutes, if you are not clicking between ARM web pages, a warning message will appear. If no action is taken within 5 minutes, you will be timed out. **Any unsaved work will be lost. It is Highly recommended that you take advantage of the SAVE button.**
Saving and Retrieving Saved Comments

- Clicking on the SAVE button will allow you to save data into the ARM system. The data will remain even if you time out or you decide to enter additional text at a later time. It is important that you click on the “Submit” button to finalize the comment even if you have saved the comment. Clicking on the submit button will clear out the 3 mandatory fields and provide you the opportunity to continue adding additional comments.
Application Evaluation Comments

Saving and Retrieving Saved Comments

- Clicking on the “Retrieve the Last Comment” link will load the comment that was saved most recently. In case of a time out, you should go to the respective criteria and click on the “Retrieve the Last Comment” link in order to retrieve the comment you were working on.
Application Evaluation Comments

Entering Multiple Comments
You can enter multiple comments for each criterion.

- To enter multiple comments, repeat steps 8-11.
- All previous comments will be visible toward the bottom of the page below the “Add a New Comment” box.
- Regardless of the order in which they were entered, comments will group by category (Strength or Weakness).
**Application Evaluation Comments**

**Editing Comments**
You can edit your saved comments at any time.

- To edit your comments click on the word **Edit** next to the comment number you would like to change.

- Clicking on the **Edit** link will open the comment window, and you will be able to edit your content. When complete click to save your changes.

**Deleting Comments**
- Click **Delete** to **permanently** remove a comment from your evaluation.
Completed Comments

Once you have finished entering all of your comments for a criterion, you will need to return to the Application Evaluation Screen.

12. After you have included all comments for the respective criterion, click on the hyperlinked word Evaluation in the bar at the top of your screen to return to the Application Evaluation Screen,
Non-Scoring Criteria

If your session was setup with non-scoring criteria, the screen will look similar to the one below. The non-scoring criteria will be displayed below the scoring criteria.

Comments for non-scoring criteria are not mandatory. Follow the previous steps to add strengths and weaknesses for non-scoring criteria.
Application Evaluation Scoring

Application Evaluation Screen
After returning to this screen you will need to continue entering comments for the remaining criteria.

- Repeat steps 7-12 to add additional comments for an application.
View Score Report

You can view a full report of your scores at any time in the process.

- To view the full report of your scores, you can click the View Score Report button at any time. The full report will pop-up in a new window. This report will be key to finalizing your review.

- To view a full copy of all of your comments for an individual application evaluation, you can click on the View Comments button at any time. The entire list will pop-up in a new window.
Submitting Your Review

When you have completed scoring the application and are satisfied with your comments you will need to submit your evaluation to your panel Chairperson.

13. Click the Submit to Chair button to submit your application evaluation to your Chairperson.

14. Click OK in the confirmation box to finalize your submission.

- Once you submit your application evaluation to your Chairperson, the application will be in a “Submitted to Chair” status and you will not be able to make any changes until he/she returns it to you for edits.

Note: The Submit to Chairperson button will not be activated until ALL scores have been entered.
Application Evaluation

Scoring and Comments Rules

- Reviewers can only see their own scores and comments.

- A score must be entered for each criterion before proceeding to enter comments. The Comments link will be automatically activated once a value is populated in the score field.

- Reviewers cannot change or modify their scores and comments once an application has been submitted to the Chairperson. Reviewers can, however, still view their own scores and comments.

- Reviews cannot be submitted to the Chairperson until the reviewer has scored all criteria for any one application.
Application Status Definitions

Pre-Review – You, the Reviewer, have ownership of your application and have not yet accessed the evaluation. You have not started the scoring and commenting phase at this time.

In Review – You, the Reviewer, have ownership of your application and have not yet submitted the application evaluation to the Chairperson. You are scoring and commenting at this stage.

Submitted to Chair – You have completed your scoring and comments and have submitted your application evaluation to the Chairperson. A Reviewer cannot make any changes while an application is in this status.

Returned by Chair – Your Chairperson has identified changes you need to address. He/She has returned the evaluation to you for additional work. A Chairperson cannot make any changes while an application is in this status.

Submitted to SAM – All Reviewers on your panel have submitted the application to the panel Chairperson, and the Chairperson has approved all of your comments and scores and submitted the application to the SAM for preliminary approval. When in the Submitted to SAM status, the panel no longer can make edits to this application report until it is returned to the panel for changes.

Returned by SAM – After a panel has completed their first session and submitted the comments and scores to the SAM, the SAM will review them and if necessary return them to the Chairperson with comments for changes or clarifications.

Submitted to PAM – All Reviewers on your panel have submitted the application to the panel Chairperson, and the Chairperson has approved all of your comments and scores and submitted the application to the SAM for preliminary approval. The SAM has sent the evaluation up to the PAM for final approval. When in the Submitted to PAM status, the panel no longer can make edits to this application report until it is returned to the panel for changes.

Returned by PAM – After a panel has completed their first session and submitted the comments and scores to the PAM, the PAM will review them and if necessary return them to the SAM with comments for changes or clarifications.

Approved – Once the PAM approves the Final Summary Report for an application, the status will immediately change to “Approved” and no further changes are required or permitted. The Approved status signifies the beginning of the finalization process for all Reviewers and Chairpersons.
Returned Applications

Returned by Chairperson

After your paneling session your Chairperson may return your application evaluation to you for changes. This can occur multiple times for one evaluation.

- You will know if an application has been returned to you because the status on your Application Selection Screen will read “Returned by Chair”.

15. To begin the process of editing your application evaluation, click on the Application Name, as you did in Step 3 to open the Application Evaluation Screen.
16. Click on the **Returned by Chairperson** status link. This will open the Returned History view in a new window.

- The Returned History page indicates the date your report was returned and the reason. It is a direct message from your Chairperson identifying the changes that need to be made. All returned comments will be stored here with the most recent message listed first.
17. Referring to the appropriate criterion, click the Comment link to add/edit comments.

18. To change a score, click the applicable Score link.

19. When you have finished updating your comments and scores, click to send your evaluation back to the Chairperson.
Completing Your Review

When an application status reads “Approved”, your evaluation role is complete. However, you must still print, sign, and return hard copies of the scoresheets in their required format.

20. Identify the application’s status as Approved.

21. Click on the Application Name to open the Application Evaluation Screen.
Printing Final Documents

Printing Score Sheets for Signature
You will need to print the PDF version of your Score Report to sign and return.

22. Click on the View Score Report button to open the final Score Report for the Approved application evaluation. The report will pop-up in a new window.

Note: Once your application is in the “Approved” status, no further changes can be made. You will no longer have access to edit any comments or scores.
Printing Final Documents

Printing Score Sheets for Signature
The web version of the score report will open for your viewing. You can again review the information here.

23. Click on the **PDF Report** link. This button will open a PDF version of your score report.

- The web page copy is NOT the version you will need to print and sign!

Note: The PDF Report link will only be activated after your application has reached the “Approved” status.

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Approach (25 points)</td>
<td>22</td>
</tr>
<tr>
<td>2 Budget and Budget Justification (25 points)</td>
<td>19</td>
</tr>
<tr>
<td>3 Job Creation (25 points)</td>
<td>23</td>
</tr>
<tr>
<td>4 Design of Project (25 points)</td>
<td>25</td>
</tr>
</tbody>
</table>

Actual Score: 89 / 100

Panel Number: 1
Reviewer Name: Edward Bailey
Reviewer Number: 5292
Date: May 1, 2012 4:21 PM

Note: A PDF report will need to be printed, signed, and submitted for each application assigned to you. PDF report can be accessed **PDF Report** or by using the link on the upper right hand corner of this page.

This final report is to be used for panel meetings or to view scoring summary for the application only. This draft report is not to be signed or submitted. A PDF version of this report will be available when the evaluation for this application has been approved by the PAM, this will be reflected in the application status as it will change to “Approved by PAM.”
Printing Score Sheets for Signature
The web version of the score report will open for viewing. You can again review the information here.

24. Confirm that this is the PDF report by checking that a blank signature line appears with your name beneath it, as well as a line for you to date your score report.

25. Print and Sign this PDF page to return!

Note: The PDF Report button will only be activated once your application has reached the “Approved” status.
Please do not forget to sign and submit all of your required paperwork.

Thank you.
PLEASE NOTE: The Application Review Module (ARM) is a system that is designed as a shared service and is maintained by the Grants Centers of Excellence for multiple federal agencies. As a result, instructions are written to be general in nature and not reflective of any specific agency policy. Users should follow their own agency’s policies and procedures with regards to the processing of grant reviews.
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• Pages 3 to 5------- About ARM and Accessing ARM
• Pages 6 to 9------- Starting the Review and ARM statuses
• Pages 10 to 16---- Adding Comments into the Final Report
• Pages 17 to 18---- Adding a Chairperson Comment
• Pages 19 to 21---- Session Timeouts and Saving your Work
• Pages 23 to 25---- Returning Evaluation to Reviewers
• Pages 26 to 28---- Reviewing the Final Summary Report
• Pages 29 to 32---- Submit to SAM and Returned by SAM
• Pages 33 to 34---- Completing Your Review
• Pages 35---------- New Features in ARM
About ARM

ARM is a web-based application used to assist the Federal grant application reviewing process. It provides a user-friendly environment to facilitate the grant review process while allowing reviewers to participate from remote locations.

- The primary users for ARM are the Reviewer, Chairperson, Secondary Area Manager (SAM), and Federal Program Area Manager (PAM).
- The Chairperson has the responsibility of building a Final Summary Report in ARM, and creating a comprehensive document of comments provided by the panel reviewers.
Accessing ARM

You will be provided a Username and Password as well as the link to the website prior to your review.

1. Enter your *username* and *password* in the appropriate boxes and click the **Login** button.

2a. **Select Your Session**
If you are participating in multiple reviews, you will need to select the session you would like to work on. Click on the link to select your session.

*Note: If the “Program Support Site” column has a [Go to Site] link visible, clicking on the link will open an outside website in a new window.*
2b. **Select Your Panel**
Click on the number of your panel which is a link to select your panel.

2c. **Select Your Role**
On the rare occasion that you are serving dual roles (Chairperson and Reviewer), you will have to select the panel associated with the Chairperson role.
Starting the Review

Application Selection Screen
This screen displays six major identifiers of the application:

- Application Number
- Application Name
- Status
- Average Score
- Evaluations Available
- Comments Added
- Application PDF File (optional)

The Chairperson will need to identify those applications in the “Submitted to Chair” status to begin their work.

![Application Selection Screen](image)

Note: In the score column, if the score shown is a double dash (--) one or more of your Reviewers have not submitted the application to the Chairperson.
Starting the Review

Application Selection Screen - Understanding Your Progress

- The column titled “Average Score” shows the average score of all of the reviewers’ totals.

- The column titled “Evaluations Available” shows how many reviewers have submitted their evaluations to you. For example, 1 out of 3 reviewers (1/3).

- The column titled “Comments Added” shows how many comments (strengths and weaknesses) have been added to the Final Summary Report for that application.
Pre-Review – You, the Chairperson, have not yet accessed the evaluation, and the reviewers have not completed their work.

In Review – The panel reviewers have ownership of this application and have not yet submitted the application evaluation to the Chairperson. You are monitoring your panel at this stage.

Submitted to Chair – Your entire panel has completed their evaluations of this application and have clicked their “Submit to Chair” button giving you access to their full summaries. A Reviewer cannot make any changes while an application is in this status.

Returned by Chair – You have paneled and identified changes needed at the reviewer level. As the Chairperson, you have returned the evaluations to one or more Reviewers for more work. A Chairperson cannot make any changes while an application is in this status.

Submitted to SAM – All Reviewers on your panel have submitted the application to the panel Chairperson, and the Chairperson has approved all of your comments and scores and submitted the application to the SAM for preliminary approval. When in the Submitted to SAM status, the panel no longer can make edits to this application report until it is returned to the panel for changes.

Returned by SAM – After a panel has completed their first session and submitted the comments and scores to the SAM, the SAM will review them and if necessary return them to the Chairperson with comments for changes or clarifications.

Submitted to PAM – You have completed compiling your Final Summary Report, to include all scores and comments by your panel, and clicked the Submit to PAM button to send the application to the PAM for final approval. When in the Submitted to PAM status, the panel no longer can make edits to this application report until it is returned to the panel for changes.

Returned by PAM – After a panel has completed their first session and submitted the comments and scores to the PAM, the PAM will review them and if necessary return them to you with comments for changes or clarifications.

Approved – Once the PAM approves the Final Summary Report for an application, the status will immediately change to “Approved” and no further changes are required or permitted. The Approved status signifies the beginning of the finalization process for all Reviewers and Chairpersons.
Application Selection

Application Selection Screen

3. Click on the hyperlinked **Application Name** to advance to the Application Evaluation Screen and begin your review.

<table>
<thead>
<tr>
<th>Application Number</th>
<th>Application Name</th>
<th>Status</th>
<th>Average Score</th>
<th>Evaluations Available</th>
<th>Comments Added</th>
<th>Application PDF File</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIP-1001</td>
<td>Birmingham-Shuttlesworth International</td>
<td>Submitted to Chair</td>
<td>89</td>
<td>3 / 3</td>
<td>1</td>
<td>Open PDF</td>
</tr>
<tr>
<td>AIP-1002</td>
<td>Ted Stevens Anchorage International</td>
<td>In-review</td>
<td>--</td>
<td>0 / 3</td>
<td>0</td>
<td>Open PDF</td>
</tr>
<tr>
<td>AIP-1003</td>
<td>Phoenix Sky Harbor International</td>
<td>In-review</td>
<td>--</td>
<td>0 / 3</td>
<td>0</td>
<td>Open PDF</td>
</tr>
<tr>
<td>AIP-1004</td>
<td>Jackson-Evers International</td>
<td>In-review</td>
<td>--</td>
<td>0 / 3</td>
<td>0</td>
<td>Open PDF</td>
</tr>
<tr>
<td>AIP-1008</td>
<td>Newark Liberty International</td>
<td>In-review</td>
<td>--</td>
<td>1 / 3</td>
<td>4</td>
<td>Open PDF</td>
</tr>
</tbody>
</table>
Chairperson’s Panel Review

Application Evaluation Screen

This screen serves as the primary control panel for working with an individual application.

- The scoring criteria are listed in the first column.

- The middle column is where you will need to click and build your Final Summary Report by criterion.

- The remaining columns are views of your individual panelists’ scores. The score will automatically average at the bottom of the screen based on the number of reviewers.
Chairperson’s Comments Review

Application Evaluation Screen
This screen is the starting point to building your Final Summary Report for an application.

4. Click on the hyperlinked Comment link to advance to review, add, and edit reviewers’ comments for this individual application.

- You will need to evaluate the individual reviewers’ comments for inclusion in the Final Summary Report by individual criterion.
Comments Screen
As the Chairperson you will create the final set of comments which will compile the Final Summary Report.

5. Click on the View and Include Reviewer Comments link to view, select, and edit your panel reviewers’ comments for the Final Summary Report.

- Chairpersons are also able to Add New Comments as needed. Instructions on adding new comments are on page 16, however, it is not a required task for the Chairperson.
Chairperson’s View Comments

View and Include Reviewer Comments

Step 5 in slide 11 will open the Edit Comments and display the comments made by Reviewer for you to read and select.

6. Click on the check-box next to the comment you would like to include in your Final Summary Report. You can select multiple checkboxes on this screen.

7. After selecting the comments click the button to save them as part of your Final Summary Report.

*Note:* Before comments are added they show a status of “Not Added” in red text. This will change to “Added” when the comment is added to the Final Comments.
Chairperson’s View Comments

- The selected comments will be displayed in a list form.

- All comments listed on the Comments screen will become part of your Final Summary Report.

- The date and time of when the comments were added will also be displayed.

- You can Edit or Delete these comments at any time.

8. Click on the hyperlinked word Evaluation in the bar at the top of your screen to return to the Application Evaluation Screen.

Note: Any comment Edits or Deletions made ONLY affect the Final Summary Report. They will not change on the Reviewer’s evaluation.
**Application Evaluation Comments**

**Viewing and Adding All Comments for All of the Criteria in One Screen**

You may view all of the comments submitted by the reviewers for all of the criteria from one screen.

- Click on the header **Comments**.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>E.Boll (5283)</th>
<th>I.Flow (4048)</th>
<th>S.Stro (4049)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Approach (Max. 25 points)</td>
<td>Comment</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>2 Budget and Budget Justification (Max. 25 points)</td>
<td>Comment</td>
<td>19</td>
<td>25</td>
</tr>
<tr>
<td>3 Job Creation (Max. 25 points)</td>
<td>Comment</td>
<td>23</td>
<td>19</td>
</tr>
<tr>
<td>4 Design of Project (Max. 25 points)</td>
<td>Comment</td>
<td>25</td>
<td>22</td>
</tr>
</tbody>
</table>

**Actual Score**

- E.Boll: 89
- I.Flow: 88
- S.Stro: 89

**Average:** 89
Application Evaluation Comments

Viewing and Adding All Comments for All of the Criteria in One Screen

- A new page will open and you will be able to check off the comments you would like to add to the Final Summary Report.

- Click on the “Add to Final Comments” button to finalize your selections.

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Comment</th>
<th>Strength</th>
</tr>
</thead>
<tbody>
<tr>
<td>R.Bull</td>
<td>Page 18</td>
<td>Page 18 Application</td>
</tr>
<tr>
<td>A.Brown</td>
<td>Page 18</td>
<td>Page 18 Application</td>
</tr>
<tr>
<td>A.Taylor</td>
<td>Page 18</td>
<td>Page 18 Application</td>
</tr>
</tbody>
</table>

- Comment: A third party evaluator who is experienced in evaluating community economic development programs. There is indication of some outcome objectives.

- Comment: The applicant results in that any kind of new jobs will be created as a result of the initiative.

- Comment: The applicant was very detailed in what kind of jobs would be created if the grant were to be approved.

Click on the “Add to Final Comments” button to finalize your selections.
Chairperson’s View Comments

Comments Screen
As the Chairperson, you may enter a comment of your own and it will automatically be included in the Final Summary Report.

- Click on the Add a New Comment link to advance to the add comment screen.
Chairperson’s Comment Entry

Adding New Comments

Clicking the Add a New Comment link will open the Comments window.

A. Click on the drop-down arrow to open the menu. Select whether your comment is a “Strength” or a “Weakness”

B. Enter a page number or any page identifying information.

C. Enter your comment. You can type directly into this field or copy and paste from a word processing program. After entering the comment it is strongly recommended you Spell Check your work.

D. Click to save your comment as part of your evaluation.
Session Time-Outs and Preventing Data Loss

Session Time Out

- In order to provide maximum data security, the ARM system sessions are designed to “Time-Out” after 30 minutes of inactivity. After 25 minutes, if you are not clicking between ARM web pages, a warning message will appear. If no action is taken within 5 minutes, you will be timed out. Any unsaved work will be lost. It is highly recommended that you take advantage of the SAVE button.
Application Evaluation Comments

Saving and Retrieving Saved Comments

- Clicking on the SAVE button will allow you to save data into the ARM system. The data will remain even if you time out or you decide to enter additional text at a later time. It is important that you click on the “Submit” button to finalize the comment even if you have saved the comment. Clicking on the submit button will provide you the opportunity to continue adding additional comments.
Application Evaluation Comments

Saving and Retrieving Saved Comments

- Clicking on the “Retrieve the Last Comment” link will load the comment that was saved most recently. In case of a time out, you should go to the respective criteria and click on the “Retrieve the Last Comment” link in order to retrieve the comment you were working on.

AIP-1001 Birmingham-Shuttlesworth International
City: Birmingham  State: AL

1 Approach

<table>
<thead>
<tr>
<th>Strength</th>
<th>Comment 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page: Entire Application</td>
<td></td>
</tr>
</tbody>
</table>

Add a New Comment  View and Include Reviewer Comments  Retrieve the Last Comment
Application Evaluation Comments

Adding Multiple Comments
You can enter multiple comments for each criterion.

- To enter multiple comments, repeat steps A-D on the previous page.
- All previous comments will be visible below the links to Add a New Comment and View and Include Reviewer Comments.
- Comments will organize by category (Strength or Weakness), regardless of the order in which they were entered.
- You can use the Edit/Delete links to make changes.

Note: All new comments added by the Chairperson automatically become part of the Final Summary Report. If you no longer want to include one of your new comments, you will need to Delete it.
9. Return Evaluations

Click the Return Evaluations button to return your Reviewers’ individual evaluations to one or more of your Reviewers.

Note: Any comments which were edited by the reviewers will need to be added to the Final Summary Report and draft comments should be deleted.

Submit to SAM

If you do not need to return any evaluations and are ready to submit the Final Summary Report to the Secondary Area Manager (SAM) for their review, skip to Step 14.
Evaluation Return Comments

Returning Evaluations
You may need to return Reviewer evaluations for edits. ARM will allow you return to Reviewers individually, or if needed, to the entire panel at once.

10. Select the Reviewer(s) whose evaluation you would like to return using the checkbox next to their name.

11. Enter the comments you would like to communicate back to your reviewers. You may enter individual return comments for each criterion. At least one return comment is required. Each field has a 4000 character limit.

12. Click the Submit button to send the evaluation back. You may also save the comment and return to it at a later time.
Returned by Chairperson

- After returning one or more of the reviewers’ evaluations, the application status changes to “Returned by Chair”.

- The Chairperson will not be able to access the panel scores for a returned evaluation until it is resubmitted by the respective reviewer(s).

- You will need to repeat Steps 4-12 until you are satisfied with your compiled Final Summary Report.
Final Summary Report

Reviewing the Final Summary Report

After all of your reviewers have re-submitted their application evaluations and you have re-compiled the comments, you will need to review the Final Summary Report.

13. Click on the button to open the Final Summary Report in a new window. This report is generated in a PDF format.
Your Final Summary Report will be a multi-page document. This includes your panel’s scores and all of the comments you have chosen. These are grouped by criterion and organized with the strengths listed first followed by the weaknesses for each. The comments are then ordered by the numerical page entry first, and then alphabetically.

**Note:** In a remote review the signature line for the Chairperson will only appear on the first page after the application is in the “Approved” status.
Final Summary Report

Tips for Reviewing the Final Summary Report

- Ensure that the report does not contain duplicate comments (a comment may be added in duplicate if it is selected multiple times). Duplicate comments should be removed prior to submission.

- Spell-Check all comments.
Submit to SAM

When the Final Summary Report is complete, the Chairperson needs to submit it to the SAM for their review and preliminary approval.

14. Click on the “Submit to SAM” button to send your panel’s Final Summary Report to the SAM.

- Once you submit to SAM, you will no longer be able to make any changes until the evaluation is returned to you by the SAM.
Returned by SAM

When the status of your application changes to Returned by SAM you will need to take your next steps.

- After you complete Step 14, the status of an application will change to “Submitted to SAM”.

- The status of an application will change to “Returned by SAM” once the SAM has reviewed your document and returns it to you for changes.
15. To begin the process of editing your application evaluation, click on the Application Name, as you did in Step 3 to open the Application Evaluation Screen.

16. Click on the Returned by SAM status link. This will open the Returned History view in a new window.

- The Returned History page indicates the date your report was returned and the reason why. It is a direct message from your SAM identifying the changes that need to be made. All returned comments will be stored here, with the most recent message listed first.
Making SAM Requested Changes

If you can make the changes yourself:
17. Refer to the appropriate criterion, and click the Comment link to add/edit comments.

If you cannot make the changes yourself:
17. Repeat Steps 9-12 to return the evaluations to your reviewers to make comments and/or score changes, and then re-submit to your SAM.
Completing Your Review

When an application status reads “Approved”, your evaluation role is complete. However, you must still print, sign, and return hard copies of the entire Final Summary Report.

18. Identify the application’s status as Approved.

19. Click on the Application Name to open the Application Evaluation Screen.
Completing Your Review

Printing the Final Summary Report

20. Click on the **View Report** button to open the Final Summary Report in a new window. This report is generated in a PDF format.

21. Confirm that this is the Approved report by checking that a blank signature line appears with your name beneath it, as well as a line for you to date your score report.

22. Print the entire report to include the score sheet and **ALL** of the subsequent comment pages.

23. Sign the first page and attach the remaining pages behind it.
New Features in ARM

Return Comments per Criterion

In previous versions of ARM, when the Chairperson returned an evaluation to the Reviewer(s), they were only given one return comment text box which had a 4000 character limit.

With this new feature, Chairpersons can now send return comments for each criterion. Each return comment per criterion has a 4000 character limit. We have also added a “General Return Comment” text box which is the only mandatory return comment field.
Please do not forget to sign and submit all of your required paperwork.

Thank you.
Logistics
Key Review Components

• The OFA grant review uses several inter-related process and management components, including the Funding Opportunity Announcement (FOA), grant applications, logistics management systems and teams, grant reviewers, and federal program staff.

• The resources used to manage the process are:
  – Application Review Module (ARM) online management system
  – ARM Technical Support Helpdesk
  – Federal Program Staff
  – F2 Solutions Review Managers
  – F2 Solutions Review Support Webpage
Required Forms: Submission Process

Log into Reviewer Website – wwwReviewerrecruitment.net
Required Forms: Submission Process (cont.)

- Navigate to Menu Tab “W-9 Information”
- Navigate to Menu Tab “Reviewer Documents”
- Enter Name, Date and Select “I Agree”
- Print Options
- For COI Only:
  - Option #1: Via email at OFA@reviewops.org
  - Option #2: Via fax to (301) 830-7926
Required Forms: Work Agreement

Independent Consultant Agreement

This Independent Consultant Agreement ("Agreement") is entered into by FZ Solutions LLC ("Company"), a MD (State) Corporation, located at 1401 Maryland Lane, Suite 401, Laurel, Maryland 20707 and ___________ ("Consultant")

Company and Consultant shall be collectively referred to as the Parties in this Agreement.

WHEREAS, Company has previously and continue to seek to engage Consultant(s), from time-to-time and nonexclusively, for the purpose of providing grant review evaluation services to various clients ("Customer") agreed upon in Exhibit A ("Statement of Work or "Work").

WHEREAS, Consultant will reasonably assign its dedication in performing the Work, subject to the terms of this Agreement and on a consulting basis pursuant to the general work requests of the Company.

WHEREAS, Consultant represents that it possesses the knowledge and skill necessary to competently perform the Work and acknowledges that Company shall be entitled to rely on such representations.

NOW, THEREFORE, the Parties hereby agree:

1. Performance Requirements:
   a. Period of Performance: This Agreement shall be entered into upon Customer acceptance of Consultant participation and shall expire on __________ or before the grant review due dates referenced in Exhibit A, unless otherwise agreed to in writing by the Parties.
   b. Statement of Work: Consultant will endeavor to perform the Work specified in Exhibit A and assumes the risk of failing to do so.
   c. Participation in the reviewer evaluation is at the discretion of the Company and Customer and is not guaranteed.

2. Relationship of the Parties:
   a. Independent Contractor: Consultant acknowledges that its services are being rendered as an independent contractor to Company and, therefore, the Consultant shall be entitled to determine the details and means for performing the Work in accordance with the Company’s and Customer’s delivery schedule. This Agreement does not constitute an employer-employee relationship between the Parties, nor do the Parties intend that this Agreement be construed as creating an employment relationship.
   b. Disclaimer: Nothing in this Agreement shall be construed as:
      1. Granting Customer or Company the power to direct and control the day-to-day activities of the Consultant;
      2. Constituting a partnership, joint venture, subconduit, co-ownership, or otherwise between the Parties;
      3. Empowering Consultant to create or assume any obligation on behalf of Company.
   c. Limitations:
      1. Benefits and Expenses: Consultant is not entitled to contributions by the Company for worker’s compensation, unemployment, Medicare, Social Security, or any other (pass) employment benefits (i.e., health insurance, life insurance, pension, and profit sharing plans), but shall only be entitled to payment in accordance with Exhibit A of this Agreement.
      2. Injuries: Consultant acknowledges that neither Company nor Customer shall be responsible for injuries sustained to Consultant’s property or property that arise from the acts and/or omissions of the Consultant. Accordingly, Consultant certifies that it has or will procure general business liability insurance in accordance with state minimums.
      3. Taxes: Consultant is not responsible for Consultant’s personal and/or business taxes, nor shall Company be responsible for Consultant’s license or permit. Accordingly, Consultant shall pay all federal, state and local taxes related to performing the Work, including but not limited to self-employment taxes. Further, Consultant shall be responsible for maintaining its license and permits.
Required Forms: Exhibit A

Exhibit A
Statement of Work: 2015 Grants for Coordination of Tribal Temporary Assistance for Needy Families (TANF) and Child Welfare Services to Tribal Families at Risk of Child Abuse or Neglect (TTCW)

Reviewers are required to provide an independent, unbiased assessment of assigned applications. Mandatory training will be conducted via webinar and/or conference call during the training cycle (tentatively scheduled below). Reviewers are expected to have no prior scheduling conflicts. Reviewers will be required to participate in approximately 6 hours of remote training, which may include independent study, written and online exercises, and participating in webinars and/or conference calls. Training must be completed prior to the grant review period defined below. The work of the Reviewer will be overseen by the panel Chairperson.

- Program Name: 2015 Grants for Coordination of Tribal Temporary Assistance for Needy Families (TANF) and Child Welfare Services to Tribal Families at Risk of Child Abuse or Neglect (TTCW)
- Training Period: Date: May 20th, 2015 Time: 2:00 PM - 4:00 PM (ET)
- Grant Review Period: Monday, June 1st – Friday, June 12th, 2015
- Anticipated Number of Applications: 50
- Anticipated Timeline to Review each Application: 6.7
- Grant Review Payment Structure: $1,900.00 - Chairperson, $1,200.00 - Reviewer
- Other:

1. Reviewers shall carefully read the evaluation criteria, the applications thereof, and instructions for rating as provided by the Federal Program staff in the training sessions.
2. Read each application independently and utilize the panel sheet for classification if needed. Reviewers will evaluate applications using the established review criteria. Reviewers are expected to provide a comprehensive review of all applications assigned and should allow for an adequate amount of time per application review as indicated in the table above. Reviewers shall complete reviews each week in accordance with the application review schedule, from the Reviewer’s chosen location.
3. Reviewers will need access to a secured, Federal Internet-based interface, in accordance with the review schedule. The entire process will be web-based, and it is up to the Reviewer discretion and expense if they desire to print any review materials during the process. Reviewer acknowledges that the Federal Program Office / F2 Solutions will not cover or provide reimbursement for expenses, including expenses associated with destruction of all confidential materials at the conclusion of the review season.
4. Compensation will be in the form of an honorarium payment at the conclusion of the review cycle. Alternate reviewers will be compensated on a prorated basis from the date they are assigned to a panel. Current Federal employees and Federal contractors are not eligible for honorarium payment.

Timely is defined as being completed on or before the due date established by the Federal Program Office.

5. Applications will be treated with strict confidentiality before, during and after the review process. No discussions outside of the panel discussion or reproduction of the applications outside of the review will be allowed. Reviewers shall promptly and properly destroy all review materials at the conclusion of the review season, but no later than one (1) week after the review and date above. This includes any electronic or printed copies of the applications, notes and all other confidential information.

Applicant Reviewer

| I have read and understood Exhibit A. |
| Name: [Name] |
| Date: [Date] |

1. Have you completed the training?
2. Have you reviewed the applications assigned to you?
3. Have you completed the review within the specified time frame?
4. Have you kept the applications confidential?
5. Have you destroyed all review materials at the conclusion of the review season?

[Yes/No]
Required Forms: ACF Conflict of Interest and Non-Disclosure Form
### Required Forms: Meeting Schedule

U.S. Department of Health and Human Services  
Administration for Children and Families  
Office of Family Assistance  
Healthy Marriage (HM) Program

**PANEL MEETING SCHEDULE**

Please submit this completed form, via email to your SAM immediately following the initial panel meeting. Remember to review the applications in the order that it appears on the panel sheet. Panels must receive feedback from the SAM and PAM on the first Application Summary Report before submitting the remaining reports.

<table>
<thead>
<tr>
<th>Date</th>
<th>Discussion Time(s)</th>
<th>Application</th>
<th>Date/Time Report Due to SAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, August 3rd</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuesday, August 4th</td>
<td>1st</td>
<td></td>
<td>Tuesday, 10 AM</td>
</tr>
<tr>
<td>Wednesday, August 5th</td>
<td>2nd</td>
<td></td>
<td>Wednesday, 10 AM</td>
</tr>
<tr>
<td>Thursday, August 6th</td>
<td>3rd</td>
<td></td>
<td>Thursday, 10 AM</td>
</tr>
<tr>
<td>Friday, August 7th</td>
<td>4th</td>
<td></td>
<td>Friday, 10 AM</td>
</tr>
<tr>
<td>Monday, August 10th</td>
<td>5th</td>
<td></td>
<td>Monday, 10 AM</td>
</tr>
<tr>
<td>Tuesday, August 11th</td>
<td>6th</td>
<td></td>
<td>Tuesday, 10 AM</td>
</tr>
<tr>
<td>Wednesday, August 12th</td>
<td>7th</td>
<td></td>
<td>Wednesday, 10 AM</td>
</tr>
<tr>
<td>Thursday, August 13th</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friday, August 14th</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Optional Form: Special Concerns

U.S. Department of Health and Human Services
Administration for Children and Families
Office of Family Assistance

Special Concern Review Notes

Directions: Panels may use this form to identify any significant area where a grant application proposes to use federal funds to support potentially inappropriate activities and any other concerns not related to the scoring criteria in the funding opportunity announcement. This may include, but is not limited to, funding restrictions (as described in Section IV.5 Funding Restrictions of the funding opportunity announcement), waste, fraud, abuse, and/or conflicts of interest.

<table>
<thead>
<tr>
<th>Applicant Name</th>
<th>Application number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page number(s) where concern(s) can be found</td>
<td></td>
</tr>
</tbody>
</table>

Description of Concern: (Allowed 2,000 characters)

Name of Reviewer | Date

You have 2000 characters remaining

Submit  Cancel
Grant Review Structure

**Week One**  
**August 3-7**

- Panels will review, score, and enter comments for 1<sup>st</sup> – 4<sup>th</sup> application.
- Chairs will provide SAM with the panel’s meeting schedule on 8/3/15.
- Chairs will initiate and facilitate the reviewers’ comment and scoring process, and compile and submit comments to SAM via ARM.
- SAMs can participate in any/all of the panel discussions and will monitor and communicate with the Chairs regarding reviewers’ progress.
- PAMs will conduct secondary review of panel compilation summary reports in ARM.

**Week Two**  
**August 10-14**

- Panels will review, score, and enter comments for 5<sup>th</sup> – 8<sup>th</sup> applications.
- Chairs will facilitate the reviewers’ revision of comments and scores, incorporate final changes in the panel compilation summary reports, and resubmit them to the SAM.
- SAMs will review and approve panel compilation summary reports and submit the reports to the PAM.
- PAMs will review and approve panel compilation summary reports.

**Daily PAM/SAM/Chair Pulse Checks**
# Grant Review Agenda

**U.S. Department of Health and Human Services**  
Administration for Children and Families  
Office of Family Assistance  
Healthy Marriage (HM) Program  
August 3-14, 2015

**GRANT REVIEW SESSION AGENDA**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>5:00 pm</td>
<td>ARM Session OPENS (Applications Available to Reviewers)</td>
</tr>
<tr>
<td><strong>Monday, August 3rd</strong></td>
<td></td>
</tr>
<tr>
<td>10:00 AM, ET</td>
<td>Introductory Call to Discuss Panel Rules of Order, Panel Meeting Schedule, and Conflicts of Interest (SAM and PAM will attend Panel Check-in)</td>
</tr>
<tr>
<td>1:00 PM, ET</td>
<td>1st Application Summary Report Due to SAM</td>
</tr>
<tr>
<td>5:00 PM, ET</td>
<td>Grant Review Forms Due to P2</td>
</tr>
<tr>
<td><strong>Tuesday, August 4th</strong></td>
<td></td>
</tr>
<tr>
<td>10:00 AM, ET</td>
<td>2nd Application Summary Report Due to SAM</td>
</tr>
<tr>
<td><strong>Wednesday, August 5th</strong></td>
<td></td>
</tr>
<tr>
<td>10:00 AM, ET</td>
<td>3rd Application Summary Report Due to SAM</td>
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<tr>
<td><strong>Thursday, August 6th</strong></td>
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</tr>
<tr>
<td>10:00 AM, ET</td>
<td>4th Application Summary Report Due to SAM</td>
</tr>
<tr>
<td><strong>Friday, August 7th</strong></td>
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<tr>
<td>10:00 AM, ET</td>
<td>5th Application Summary Report Due to SAM</td>
</tr>
</tbody>
</table>

| **Monday, August 10th** | **Friday, August 14th** |
| 10:00 AM, ET           | 5:00 PM, ET            |
| 10:00 AM, ET           | ARM Session CLOSED     |
| 10:00 AM, ET           | 6th Application Summary Report Due to SAM                                |
| 10:00 AM, ET           | 7th Application Summary Report Due to SAM                                |
| 10:00 AM, ET           | Finalize Application Summary Reports                                    |

---

**ADMINISTRATION FOR CHILDREN & FAMILIES**
Panel Assignments

- Individual panel sheets will be distributed on August 31st. Panel information to be provided will include:
  - Contact Information for Panel Chairperson, SAM and PAM
  - Virtual Panel Access
  - Applications Assigned to the Panel
  - Unique ARM Username and Password
  - Link to Resource Webpage

- Applications reviewed in order assigned to panel to assist in managing conflicts of interest

- Once you have received your panel sheet, please log into ARM. If problems arise regarding your username and password, contact OFAtech@reviewops.org
# Panel Assignments - Chairs

## U.S. Department of Health and Human Services
Administration for Children and Families
Office of Family Assistance
August 3-14, 2015
Panel Information Sheet – Panel 1
Healthy Marriage and Relationship Education Grants
HHS-2015-ACF-OFA-FM-0985

<table>
<thead>
<tr>
<th>Role</th>
<th>FName</th>
<th>LName</th>
<th>Email</th>
<th>ST</th>
<th>Rgn</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair</td>
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<tr>
<td>Reviewer</td>
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<td>Reviewer</td>
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<td>SAM</td>
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<td>PAM</td>
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</tbody>
</table>

## Conference Call Information:
- Conference Call Number:
- Leader Code:
  - Conference Line Quick Tips: Press *0 for Operator assistance; press *6 to mute/unmute

## ARM Information:
- Username:
- Password:
  - To access ARM please visit [https://arm.grantsolutions.gov/arm/](https://arm.grantsolutions.gov/arm/) and select "Reviewer Logon". Enter the above username and password. The username is case sensitive.
- Should you have questions regarding the grant review process or need assistance with your ARM username and password, please contact OFA@reviewops.org
- Should you need technical assistance with ARM please contact the Help Desk at OFATech@reviewops.org

## Resources:
Panel Assignments - Reviewers

<table>
<thead>
<tr>
<th>Role</th>
<th>FName</th>
<th>LName</th>
<th>Email</th>
<th>ST</th>
<th>Rgn</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair</td>
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<tr>
<td>Reviewer</td>
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<tr>
<td>SAM</td>
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<tr>
<td>PAM</td>
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</tbody>
</table>

**Conference Call Information:**
Conference Call Number: [Insert number here]
Guest Code: [Insert code here]
*Conference Line Quick Tips: Press *6 for Operator assistance; press *6 to mute/unmute.

**Resources:**
- Should you have questions regarding the grant review process or need assistance with your ARM username and password, please contact OFA@reviewops.org
- Should you need technical assistance with ARM please contact the Help Desk at OFATech@reviewops.org

**ARM Information:**
Username:
Password:
*To access ARM please visit [https://arm.grantsolutions.gov/arm/](https://arm.grantsolutions.gov/arm/) and select "Reviewer Login". Enter the above username and password. The username is case sensitive.
Key Review Resources and Tools

- Reviewer Resource Webpage
  - Link: http://wwwReviewerrecruitment.net/ofa/hm.html
Key Review Resources and Tools (cont.)

- Telephone service and computer with reliable Internet access via broadband or DSL
  - Windows or Mac-based interface with IE, Firefox or Safari browser are best
  - Google Chrome does not interface well with ARM
  - Back-up plan to access the Internet in the event the primary Internet connection is lost during a review. A connection must be re-established within three hours
- Adobe Acrobat Reader
  - To download Adobe Acrobat Reader for free visit: http://get.adobe.com/reader/
# Grant Review Reminders

<table>
<thead>
<tr>
<th>Event</th>
<th>Date/Time</th>
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</thead>
<tbody>
<tr>
<td>Required Forms Due</td>
<td>Wednesday, July 29th by 5:30 PM (ET)</td>
</tr>
<tr>
<td>Panel Sheets Distributed</td>
<td>Friday, July 31st 5:30 PM (ET)</td>
</tr>
<tr>
<td>Virtual Panel Access</td>
<td></td>
</tr>
<tr>
<td>ARM Session Opens</td>
<td></td>
</tr>
<tr>
<td>Grant Review Starts</td>
<td>Monday, August 3rd</td>
</tr>
<tr>
<td>Chair Holds Introductory Panel Meeting</td>
<td></td>
</tr>
<tr>
<td>Meeting Schedule Due to SAM</td>
<td>Tuesday, August 4th</td>
</tr>
<tr>
<td></td>
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</tbody>
</table>
GoToMeeting
Virtual Panel Meetings
Making the Difference

Congratulations on your selection to participate in the pilot program for Virtual Panel Discussions! The purpose of this program is to help the Federal staff assess how the panel discussion process is affected when webinar technology is introduced.

Historically, the Federal discretionary grant review process required travel and face-to-face interaction. Reviewers and Chairs were collocated in a single meeting space and asked to deliberate on the feasibility of grant applications. In recent times, the government has adopted a more remote and virtual process that utilizes web-based grants technology. Reviewers and Chairs work independently from their homes, and communicate via email and phone.
Virtual Panel Meetings

Go-To-Meeting will be used to assist and enhance the paneling experience while discussing the comments and scores for each application. By using the webcam, each of the participants will be visible to each other, and will have an experience that more closely replicates an in-person meeting. Chairs will have the ability to display their screen to the panel, so that the comments are visible to all of the reviewers.
A GoToMeeting account has been established for your panel. As a panel Chair, you must follow the steps below to ensure that you are able to schedule panel meetings at will throughout the grant review period.

- **Install GoToMeeting**
  - Visit [www.gotomeeting.com](http://www.gotomeeting.com)
  - Select **Host A Meeting**
  - Download the GoToMeeting Software.

** If you have previously used GoToMeeting or another program by Citrix, installation may not be required.
Set Up GoToMeeting (cont.)

• **Schedule a Meeting**
  – Log into www.gotomeeting.com using the login credentials provided by your F2 Review Manager.
  – On the My Meetings page, click **Schedule a Meeting**
  – Use the pop-up window to specify the details of your meeting:
    – **Subject:** THPOG Panel #_Panel Discussion 1
    – **Recurrence:** Select as needed – Chairs have the discretion to schedule recurring meetings or interim discussions.
    – **Date:** Enter date and time.
    – **Audio:** Select VOIP and **toll free conference line.**
  **The chairperson/organizer will start all scheduled panel meetings and must remain present to keep the meeting running.**

• **Minimum Requirements**
  – Telephone service and computer will reliable Internet access via broadband or DSL
Managing Your Meeting

Start a Scheduled Meeting

• Log in to [www.gotomeeting.com](http://www.gotomeeting.com).
• On the My Meetings page, locate the scheduled meeting you want to start and click the **Start** button.
• The meeting window will be launched and you can use the Control Panel to begin showing your screen.

a. **Session controls**
   • Share your Screen
   • Share your webcam
   • Change presenter
   • Give keyboard and mouse control

b. **Audio controls**
   • Connect to session audio
   • Manage in-session audio

c. **Attendee controls**
   • View and manage attendees
   • Invite others
   • Add co-organizers

d. **Chat**

e. **Recording controls**

f. **Additional features**
Managing Your Audio

With GoToMeeting’s integrated audio, you can choose to connect to the audio conference using telephone and/or mic and speakers (VoIP).

• To join the audio portion of the meeting by telephone
  1. Expand the Audio pane in your Control Panel.
  2. Select **Use Telephone** (a).
  3. Dial in to the conference call with the information provided.

• To join the audio portion of the meeting via mic & speakers
  1. Expand the Audio pane in your Control Panel.
  2. Select **Use Mic & Speakers** (b).
  3. You will be automatically connected into the audio conference over VoIP.
Sharing Your Webcam

Meeting participants can share up to 6 high-resolution video conferencing streams while viewing the presenter's screen.

You can share your webcam in any of the following ways:
• Click the webcam button on the Grab Tab.
• Click the **Share My Webcam** button in the Webcam pane on the Control Panel.
• Select **Share My Webcam** from the Webcams drop-down menu.
• Click the webcam button next to your name in the Attendee List (Windows-only).
• Right-click your own name in the Attendee List and select **Share My Webcam**.
Conducting the Panel Discussion

Prior to displaying your screen in the meeting, you should be logged into the GrantSolutions.gov ARM system. At the point of discussion, all reviewers should have submitted their comments and scores so that the application is in “Submitted to Chair” status.
Select the link for the application for discussion and the Application Criteria Summary will appear. Select the **Comment** link for the criteria to be discussed with the Reviewers.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Comments</th>
<th>E.Ball (5283)</th>
<th>J.Flour (4048)</th>
<th>S.Stro (4049)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Approach (Max. 25 points)</td>
<td>Comment</td>
<td>22</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>2 Budget and Budget Justification (Max. 25 points)</td>
<td>Comment</td>
<td>19</td>
<td>25</td>
<td>23</td>
</tr>
<tr>
<td>3 Job Creation (Max. 25 points)</td>
<td>Comment</td>
<td>23</td>
<td>19</td>
<td>25</td>
</tr>
<tr>
<td>4 Design of Project (Max. 25 points)</td>
<td>Comment</td>
<td>25</td>
<td>22</td>
<td>18</td>
</tr>
</tbody>
</table>

**Actual Score**
- 89

**Average:** 89
Conducting the Panel Discussion (cont.)

Click on “View and Include Reviewer Comments” to pull up the reviewer comments for the criteria which need to be discussed. You are now ready to share your screen with the reviewers.

<table>
<thead>
<tr>
<th>1 Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AIP-1001 Birmingham-Shuttlesworth International</strong></td>
</tr>
<tr>
<td>(Submitted to Chair)</td>
</tr>
<tr>
<td>City: Birmingham  State: AL</td>
</tr>
</tbody>
</table>

- **Log on/off**
- **Agency Home**
- **Panel List**
- **Applications List**
- **Evaluation**
- **Comments**

Panel: 1  Chair: Edward Bailey (# 5283)
Use the display of comments to facilitate the panel discussion.
In short, using the webinar panel discussion platform allows you, the Chairperson, to compile the Final Summary Report for each application in real-time.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Comments</th>
<th>E.Rail (5283)</th>
<th>I.Flow (4048)</th>
<th>S.Siro (4049)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Approach (Max. 25 points)</td>
<td>Comment</td>
<td>22</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>2 Budget and Budget Justification (Max. 25 points)</td>
<td>Comment</td>
<td>19</td>
<td>25</td>
<td>23</td>
</tr>
<tr>
<td>3 Job Creation (Max. 25 points)</td>
<td>Comment</td>
<td>23</td>
<td>19</td>
<td>25</td>
</tr>
<tr>
<td>4 Design of Project (Max. 25 points)</td>
<td>Comment</td>
<td>25</td>
<td>22</td>
<td>18</td>
</tr>
<tr>
<td>Actual Score</td>
<td></td>
<td>89</td>
<td>88</td>
<td>89</td>
</tr>
<tr>
<td>Average:</td>
<td></td>
<td>89</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
You will also be able to add comments during the panel discussion.

When new points are raised that lead to new strengths and weaknesses, you may utilize the “Add a New Comment” feature to capture these ideas.

Comments do not have to be typed by a reviewer to be added to the Final Summary Report.
The Panel Discussion is complete when you and the panel members have reviewed, edited, and added final comments for each Criterion to the Final Summary Report.
Ending Panel Meetings

• On a Windows, select the **File menu** from the Control Panel, and then select **Exit – Leave Meeting**. Or, you can also click on your Control Panel or GoToMeeting Viewer or webcam.

• On a Mac, select the GoToMeeting menu on Control Panel and then select **Quit GoToMeeting**. You can also select the **File menu > End Meeting**
Panel Discussion Support

If you experience technical difficulty with scheduling and/or hosting a panel discussion webinar, please send an email to WebinarTech@reviewops.org

For additional support, the following online resources are available:

http://www.gotomeeting.com/online/support
QUESTIONS?
Chairperson Training

All Chairpersons, SAMs and PAMs should remain on the webinar.

The Chairperson Training will start momentarily.

Thank You!
Chairperson Responsibilities

• Lead all panel meetings.
• Reinforce panel members’ understanding of the program announcement and evaluation criteria.
• Complete the Panel Summary Reports using ARM for each application reviewed.
• Make or coordinate all the necessary revisions to Panel Summary Reports as requested by your SAM and PAM.
• Do not score applications.
• Carefully read the funding opportunity announcement.
Chairperson Responsibilities (cont.)

- Fully understand how to apply the evaluation criteria.
- Read ALL of your applications.
- Maintain communication with the SAM to facilitate smooth functioning of all panel activities (Hint: Your SAM will be your best friend).
- Promote and maintain compliance with confidentiality guidelines.
- Be available to Reviewers and the SAM daily.
Reviewer Responsibilities

• Read ALL applications assigned to the panel.
• Provide scores and comments according to provided guidelines.
• Be available and actively participate in panel calls.
• Address Chair, SAM and PAM comments.
• Adhere to established schedule.
• Maintain compliance with confidentiality guidelines.
• Be available and respond to the Chair messages.
• Notify Chair immediately of any issues or concerns.
Managing Your Panel

• The intent of the panel meeting is to:
  (1) Resolve any issues with respect to an applicant’s score and
  (2) Make certain that comments are consistent with the score.

• The meetings will help the Chair in writing the panel summary reports.

• Each reviewer must complete an independent review of each application.

• A reviewer may decide to change his or her score or comments based on the discussion in the panel meeting.
Managing Your Panel (cont.)

Setting the Stage:

• Important for Chair to set the tone and direction once their panel begins review process;
• Establish ground rules early;
• Reiterate the objective; and
• Maintain control.
Managing Your Panel (cont.)

First Panel Meeting Tasks:
• Introduce yourself and get acquainted;
• Establish the meeting schedule;
• Define rules for discussion;
• Establish time limits for each discussion; and
• Identify and resolve any potential conflicts of interest.
Managing Your Panel (cont.)

Each panel member should:

• Submit scores and comments into ARM prior to each conference call;
• Be prompt and fully prepared for all scheduled conference calls;
• Fully participate in all conference calls;
• Maintain objectivity and make thorough, comprehensive analysis of applications; and
• Demonstrate respect for fellow panel members.
The chairperson’s job is to make getting results easier. Stay focused on achieving the outcome of the group (consensus) by:

- Asking open ended questions;
- Watching group dynamics, if challenges arise, address them immediately;
- Asking participants to expand on their comments;
- Practicing problem solving and consensus building;
- Developing the panel summary report as a team;
- Maintaining confidentiality; and
- Asking for assistance when needed.
Managing Your Panel (cont.)

• Watch for early signs of conflict or other problems – discuss options with your PAM.
• Remember: It is relatively easy replace a reviewer, especially early in the process.
• In almost every group, a few will tend to dominate the discussion at the expense of the more quiet:
  – Direct questions to others
  – Ask the panel members to “hold their thoughts”
  – Assign a panelist as a “discussion starter” for each application
  – Communicate with the dominator or quiet members separately
Consider the following techniques for bringing discussions to closure:

- Summarize points made
- Set time limits ahead of time
- Reiterate the panel objective and goals
Before Submitting Summary Report

• Cross-walk the scores and comments to be sure:
  – There are no strengths listed where zero points are awarded.
  – There are no weaknesses listed where the maximum points are awarded.
  – Comments justify the scores awarded.

• Review all comments to ensure that:
  – There are no duplicative comments.
  – None of the comments contradict each other.
  – Comments are under the correct criteria.
  – Comments are free of spelling, grammar, and punctuation errors.

• Do not submit a summary report with noted errors just to meet a deadline. Contact your SAM and work out a new timeline.
Application Review Process

- Multiple rejections by the Chairperson to panel members
- Multiple rejections by the SAM/PAM possible
- Multiple applications in process concurrently, at different stages
- Panel Summary Report is not complete until approved by PAM in ARM
- SAM/PAM cannot edit the Panel Summary Reports; must work with Chairperson
- Some Panel Summary Report edits addressed by Chairperson; others may require revisions/reconvening
Initial Communication with the SAM

• Introductions
• Expectations
  – Daily Pulse Checks
  – Availability
  – Response Timeframes
• Schedule
  – Grant Review Agenda
  – Panel Meetings
• Questions or Concerns
  – FOA/Criteria
  – Roles and Responsibilities
Completing the Grant Review Session

- Stay organized and finish strong.
- Keep to your schedule.
- Stay accessible to your panel members and SAM.
- Remind your panel they are not finished until all assigned applications are in the “Approved” status in ARM.
QUESTIONS?

Email to: OFA@reviewops.org