Sample Reviewer Forms
Ohio History Fund 2022 – 2023 (FY2023)
For Reference Only

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

An application undergoes three stages of review: 1) **Technical Review**, 2) **Staff Review**, and 3) **Panel Review**. The History Fund’s review process is extensive because the money it grants is voluntarily given. The History Fund must demonstrate that supports projects that have the greatest need and impact, and the best chances for success.

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

- Use the *Grant Submission Check List* [here](#) to make sure your application in complete before you submit it! Incomplete or inaccurate information could hurt your chance to receive a grant. (The link takes you to the “Applying for a Grant” page of the History Fund’s website. Scroll to “Application Related Resources” to find the check list.)

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

- Make sure your project is eligible by reviewing the *Ohio History Fund Guidelines* [here](#) Contact us with any questions! (The link takes you to the “Applying for a Grant” page of the History Fund’s website. Find the *Guidelines* there.)

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

Contingent on the number of applications, technical reviews are usually completed within a month of application deadline.
2) **Staff Review** is the second stage of application review. Ohio History Connection staff experts review projects in their areas of expertise to ensure the proposals are realistic and achievable (e.g. staff of the State Historic Preservation Office review Bricks & Mortar proposals, curators – museum exhibit proposals, Digitization Services staff – digitization projects, etc.).

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

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

**NOTE:** Because of the configuration of our grant management software, the Technical Review Check List follows the Staff Review Form although Technical Review is the first step in the review process.

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

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

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

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

Andy Verhoff  
Ohio History Fund & Outreach Manager  
State Historic Preservation Office / Ohio History Connection  
800 East 17th Ave., Columbus, OH 43211  
614-562-4490 (cell) / 614-297-2341 (office)  
averhoff@ohiohistory.org
Technical & Staff Review
Sample Reviewer Forms
History Fund 2022-2023 (FY23)

Project Name

Project Name
Character Limit: 100

Staff Review Comments

INSTRUCTIONS

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

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

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

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

1) Statement of Need*

- Is it clear what this project will accomplish?
- Why is the historical information this project would preserve and/or disseminate important?
- How compelling is the need for this project at this time?

Character Limit: 1500
2) Description of Impact*
   • How well will the project serve the audiences identified in the application?
   • Are the measures identified for evaluating the project suitable?

Character Limit: 1500

3) Project Design & Resources*
   • Can the project be accomplished as described with the staffing, budget, and schedule proposed? Why or why not?

Character Limit: 1500

4) Professional Standards*
   • Does the proposed project adhere to standards and best practices for the field(s)?

Character Limit: 1500

5) Other Comments
   Please share any additional comments.

Character Limit: 1500

Technical Review Check List (History Fund staff use only)

APPLICANT INFORMATION / ELIGIBILITY*

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

Comments - Applicant Information / Eligibility
Character Limit: 2000

Score - Applicant Information / Eligibility*
Correct and complete data = 2 points
Some, but not all data, correct and complete = 1 point
Incorrect or incomplete data = 0 points

Scoring Options: 0 - 2

PROJECT NARRATIVE - Required items provided*
We use his section is to track whether applicants provided the attachments required. The section is not a review of the written qualify of the narrative.

Choices
If Bricks & Mortar project, the structure is on the NRHP or is designated by local ordinance (CLG).
NR reference number or other legal proof of historic designation provided.
If Bricks & Mortar project, structure used primarily for collections care.
If required, dates for Request for Proposal.
Photographs uploaded and legible.
Statements of Qualification / Resumes legible.
If required, Letters of Commitment attached and legible.
If Ohio History Connection site partner, latest site agreement attached and legible.

Comments - Project Narrative
Purpose of project?
Character Limit: 2000

Score - Project Narrative*
Correct and complete data = 2 points
Some, but not all data, correct and complete = 1 point
Incorrect or incomplete data = 0 points
Scoring Options: 0 - 2

BUDGET - Required items provided*
Choices
Budget Form attached and can open
Project director in budget (required)
Project bookkeeper in budget (required)
Match Summary Worksheet completed
If Bricks & Mortar project, Construction Budget Form completed
Cost Estimates attached (not required). Can open? Legible?
Totals in Budget Spreadsheet agree with those in Grant Project Data section?

Comments - Budget
What is the History Fund asked to pay for?
RFP required?
Character Limit: 2000

Score - Budget*
Correct and complete data = 2 points
Some, but not all data, correct and complete = 1 point
Incorrect or incomplete data = 0 points
Scoring Options: 0 - 2

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

Comments - Grant Project Data
Character Limit: 2000

Score - Grant Project Data*
Correct and complete data = 2 points
Some, but not all data, correct and complete = 1 point
Incorrect or incomplete data = 0 points
Scoring Options: 0 - 2

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

Comments - Elected Officials, Signatures, IRS Form 990
Character Limit: 2000

Score - Elected Officials, Signatures, IRS Form 990*
Correct and complete data = 2 points
Some, but not all data, correct and complete = 1 point
Incorrect or incomplete data = 0 points
Scoring Options: 0 - 2

TOTAL SCORE*
10 = Highest Score
0 = Lowest Score
Character Limit: 100

Application Status*
Choices
Application Complete
Application Not Complete / Returned to Draft
Application Tabled because of ineligibility

Date(s) Reviewed*
Character Limit: 250
Additional Comments
Dates of contacts. OHC division / department review assignments. Etc.

*Character Limit: 10000*
Panel Review
Sample Reviewer Forms
History Fund 2022-2023 (FY23)

Project Name

Panel Reviewer Comments & Scoring

INSTRUCTIONS

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

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

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

- Use the questions in each section to guide your comments.
- Note the strengths and shortcomings the proposal. Share shortcomings in the spirit of offering constructive, helpful feedback.
- Award points by section and record point totals at the end, where indicated. Scores based on a 100 point scale.
- Scores and comments should align. It's confusing when a reviewer only praises a project, offers no constructive criticism, and then gives the application a low score.

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

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

- If a conflict does exist, write "recuse" in comments sections of this form. Do not numerically score the application.
STATEMENT OF NEED (0 - 25 points):*
- Is it clear what the project will accomplish?
- Why is the historical information this project would preserve and/or disseminate important? Or, if Organizational Development proposal, will the project enable the applicant to better achieve its mission?
- How compelling is the need for this project at this time?

COMMENTS & SCORE (0-25):
*Character Limit: 2500

DESCRIPTION OF IMPACT (0 - 25 points):*
- How well will the project serve the audience(s) identified in the application?
- Are the measures identified for evaluating the project suitable?

COMMENTS & SCORE (0-25):
*Character Limit: 2500

PROJECT DESIGN & RESOURCES (0 - 40 points):*
- How well are the activities and schedule suited to accomplishing the project?
- Does the proposal satisfactorily explain how professional standards or best practices will be followed?
- Does the proposal identify qualified people to execute the project, or indicate that qualified people will be secured?
- Is the budget realistic? Do the budget and project narrative align?
- Do the sources of match demonstrate support for the project?

COMMENTS & SCORE (0-40):
*Character Limit: 2500

ACCURACY & COMPLETENESS OF APPLICATION (0 - 10 points)
- Using the criteria listed and scores provided in the Technical Review section of the Staff Review, evaluate the accuracy and completeness of the application. Does the application "check (required) the boxes"?
- The scores in this section will help panelists break ties among projects. Otherwise strong applications that also show attention to administrative detail should prevail.

COMMENTS & SCORE (0-10):
*Character Limit: 2500
ADDITIONAL COMMENTS (Optional):
Character Limit: 2500

TOTAL SCORE:
*Total Score = Statement of Need score + Description of Impact score + Project Design & Resources score + Accuracy/Completeness of Answers score
Character Limit: 100