Maryland Heritage Areas Authority

Grants Review Panel

Procedures and Guidelines

The Grants Review Panel of the Maryland Heritage Areas Program plays a critical role in the review and recommendation of project grant applications each year. The work of the Grants Review Panel focuses on ensuring that the grants that are ultimately approved by   the Maryland Heritage Areas Authority (MHAA), the program's governing body, are distributed fairly and equitably across the State of Maryland.

About the Maryland Heritage Areas Program

The Maryland Heritage Areas Program provides capital and non-capital grants for projects that take place in one or more of the 13 Certified Heritage Areas across Maryland.
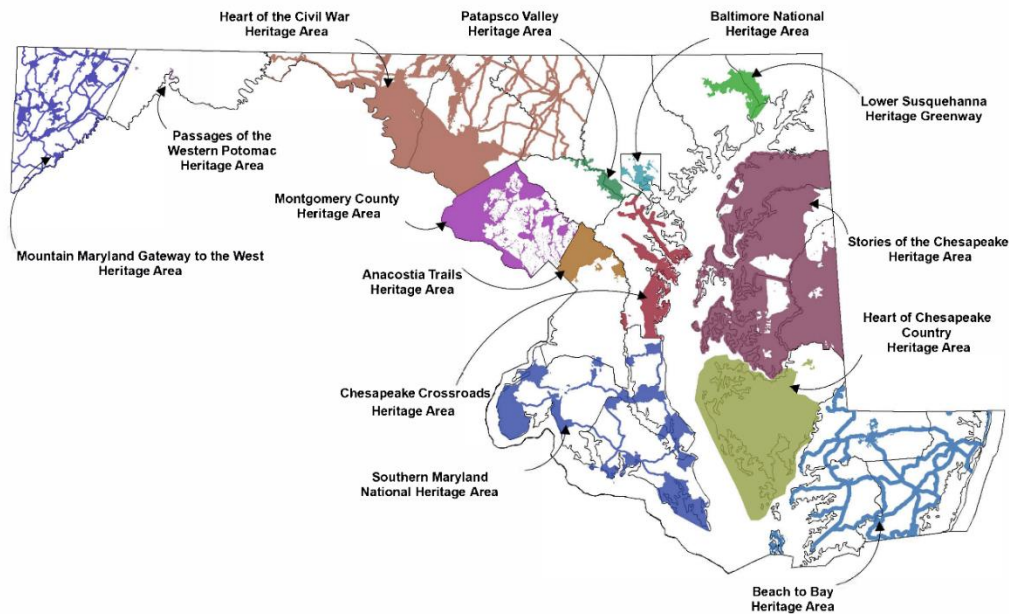
The program supports economic development through the creation of heritage tourism projects and the preservation of natural, cultural, and historical resources. The program's three primary areas of focus are 1) Developing Heritage Tourism Products; 2) Building Partnerships; and 3) Sustaining Regional Identity. Additional information about the program, and the 13 Certified Heritage Areas, can be found here: https://mht.maryland.gov/Pages/MHAA/heritage-areas.aspx.

Panel Process Overview

The Maryland Heritage Areas Program awards up to $5.1 million in grants each year through a competitive process. Applications are reviewed and ranked first by a review panel at the local level in the heritage area in which the project will take place.

Once the local review process is complete, the applications are reviewed by the state Grants Review Panel, the group for which this procedures and guidelines document is intended. The Grants Review Panel is comprised of a diverse group of individuals from across the state, representing a wide range of areas of expertise and knowledge, from natural resources and historic preservation to tourism/economic development and anthropology and public programming. Panel scores and discussions are used to rank the applications and make funding recommendations to the MHAA. The Authority makes the final grant award decisions each year at their July meeting.

Panelist Application / Nomination and Selection

Grants Review Panelists are community members with a commitment to the natural, cultural, and historical heritage of the State of Maryland, with knowledge and experience in areas relating to a broad range of related fields. The Maryland Heritage Areas Program strives to create a fair and impartial panel environment that is representative of the diversity of the State of Maryland, and therefore seeks to create a diverse panel (see **Diversity**, below).

Applications/nominations of prospective panelists at the state level are primarily collected December – January for the next grant cycle, but are accepted year-round via an online form at https://forms.gle/C88i4tb5pzVV9eSs5. The application/nomination form includes information about the individual's related employment history and background in the form of a brief statement about their knowledge and experience in particular fields and areas of interest as they relate to this opportunity.

Panelists should be comfortable using computers and have access to the internet, as all grant applications are submitted and reviewed through an online reviewer portal and Microsoft Teams.

Panelists are interviewed and selected by program staff based on the skillset needed to review grants; specific educational and experience credentials that other panelists might not have; and geographic and human diversity. The panel also includes representatives from six state agencies – the Departments of Natural Resources, Housing and Community Development, Commerce, Transportation, and Education, as well as the Maryland Historical Trust. The state's ethnic and cultural commissions are also invited to nominate potential panelists.

Because of the need to form a well-balanced panel, MHAA program staff may not be able to consider all of the qualified people who apply/are nominated in a given year. Qualified candidates will, however, be retained in a pool for future years.

Note: Members of the Maryland Heritage Areas Authority, employees of local heritage area management entities, as well as local heritage area management entity board members and grants review panelists, are not eligible to serve on the state Grants Review Panel.

Diversity

The Maryland Heritage Areas Program seeks to be inclusive and accessible to all applicants and to make diversity, equity, and inclusion central considerations in each step of our grants review process. We believe that varied perspectives and experience — among panelists, staff, and applicants — generate better grant projects to steward and share the heritage of our diverse communities. As part of this commitment, we seek to convene a Grants Review Panel that reflects the human and geographic diversity of Maryland.

Panelist Terms

Each non-state panelist may serve for 2 consecutive 3-year terms and panelists can re-apply to the panel after a 2-year absence. Whenever possible, the terms of the Grants Review Panelists will be staggered to ensure that there isn't a complete turnover of membership in any given year. Panelists will be reviewed by program staff at the end of each three-year term to ensure that they are meeting expectations and requirements.

Panelists Expectations, Requirements and Time Commitment

All panelists are required to:

- Participate in an initial orientation training process when first joining the panel.
- Participate in annual training sessions to include sessions on bias awareness.
- Review all applications assigned to them prior to the panel review meetings and complete a preliminary evaluation of the applications.
- Participate in one 2- hour small group meeting with fellow grant reviewers
- Submit all their scores by the assigned deadline.
- Attend two Grants Panel deliberation meetings (approximately 2 - 5hours on the selected dates).
- Participate in an after-action interview at the end of each grant cycle to provide feedback about the process.

Each panelist will be assigned between 20-25 applications to review starting in April. Each panelist should allow approximately 30 minutes-1 hour to evaluate each of those applications, depending on their length. In addition to the time spent reading and scoring applications, each panelist will be expected to attend two review meetings in June, and possibly a third meeting in July (if MHAA has questions about grants being recommended for funding). Panelists should also expect some additional hours for training and initial review of background materials.

In total panelists should expect to spend between 30 and 50 hours on grants review activities over the course of several months, mainly focused in May and June (see chart below). This is a significant time commitment but serving as a panelist also yields substantial benefits. Panelists gain a better understanding of Maryland's cultural resources, become better grant reviewers and writers, gain increased understanding of the grants review process, and serve their communities by playing important

roles in the distribution of funds to grantees across the state. Non-state panelists are also eligible to receive an honorarium (see below).

Activity	Estimated Time for New Reviewer	Estimated Time for Experienced Reviewer
Grant Reading/Reviewing	30 hours	15 hours
One Small Group Meeting	2 hours	2 hours
Additional Review of Local Heritage Area Priorities and Goals	3 hours	1 hours
Two Large Grant Review Meetings	10 hours	10 hours
TOTAL	50 hours	31 hours

Honoraria and Travel Costs

Non-state employees who serve on the Grants Review Panel are eligible to receive an honorarium, in recognition of the time and effort that panelists put into the grants review process. The honorarium is optional, and is calculated using the following model:

Activity	Payment Amount	Description of Activity
Training(s)	$50	Flat payment for any training required in a given year
Two Primary Grants Review Meetings	$100 per meeting	Meetings to review and discuss applications – may be in-person or virtual, generally 2 annually
Review of Grant Applications	$200	Flat payment for review of grant applications assigned in a given year
Travel (to in-person meetings)	Reimbursable	Reimbursements for mileage, accommodations, and meals for round trip travel to grant review meetings, based on the travel [rates and policies](#) for Maryland State employees. Reimbursement for travel expenses is also available to state-agency-appointed panelists.

MHAA program staff will provide the necessary forms to request an honorarium at the end of the year's grants review process. Panelists will be required to submit I-9 and/or W-9 forms and provide copies of identification documents in order to be added to the state's payment system and receive an honorarium payment.

All panelists (both state and non-state) are eligible to receive reimbursement for mileage and other travel costs at prevailing state rates for attendance at in-person meetings and trainings. Travel

regulations established by the State of Maryland apply to all panelists. Program staff will provide the necessary forms for reimbursement.

Orientation and Training

It is critical that all panelists are properly trained and provided sufficient background about the goals and objectives of the Maryland Heritage Areas Program, as well as details about the goals and objectives of each of the Certified Heritage Area for which they will be reviewing grant applications. All panelists must participate in an orientation and training process led by program staff. They are also provided with access to all relevant heritage area planning documents.

Review of Grant Applications

1. Before reviews of applications begin, all panelists receive the full list of applicant names and are asked to recuse themselves from any for which they have a conflict of interest. This is done via a form that is provided by program staff

2. Program staff will create approx. 8 small groups comprised of 4-5 panelists who will be assigned to review the same set of applications. MHAA staff will ensure that the assigned reviewers for each group have the expertise and diverse backgrounds necessary to evaluate the applications

3. Reviewers must score all applications that they are assigned to read, this allows program staff to generate average scores that are comparable for all applications.

4. Information is shared through Microsoft Teams and email and the assigned panelists provide scores for each application through the online reviewer portal, which is accessible at https://mht.goreviewers.com. Instructions on use of the online portal are available here: https://mht.maryland.gov/Documents/MHAA/reviewerportalguide.pdf.

5. Program staff create a ranking list based on the scores from the assigned reviewers, which will then be combined in an algorithm with the local heritage area ranking. The combined ranking list is circulated to the Grants Review Panel before the first Grants Review Panel meeting and will be the basis of the grant review discussion at the Panel meetings.

6. The Grants Review Panel holds two 2-5 hour deliberation meetings in June on selected dates where discussions about the rankings take place. The Grants Review Panel may choose to rearrange the ranking based on the group discussion.

7. At the second meeting of the Grants Review Panel, the final ranking and recommendations for funding will be completed. This includes discussing if any projects are being considered for partial funding. Also at this meeting, the Panel will review projects that are at or around the funding cut off point and propose a reserve list consisting of projects for which they recommend awarding grants if additional grant funds become available. The Panel will also identify any projects they are not recommended for funding or reserve list consideration and will provide clear justifications as to why. The Grants Review Panel will take time to meet with program staff after the second meeting to reflect on the grants review process, share their experiences, and make recommendations for improvement.

Responsibilities

Panel Chair	Panel Members	MHAA Program Staff	Local HA Staff
Nominated and elected by the members of the Grants Review Panel	Review and evaluate submitted grant proposals.	Coordinate meeting schedules and application processing.	Conduct review of applications at the local level and provide scores.
Preside over the Panel meetings, facilitating discussion by all Panel members.	Participate in discussion. Attend two larger group decisions meetings in June, and possibly a third in July, to make final funding recommendations to MHAA.	Inform the Panel in matters of MHAA policy. Provide clarification on pertinent facts regarding an applicant to the Panel.	Provide an overview letter detailing the local heritage area scores, rankings and reasoning, as well as an overview of the priorities of the local heritage area.
Review and evaluate submitted grant proposals assigned to them.	Attend small group meeting with fellow reviewers and heritage areas.	Provide information related to match, management capability, past performance, and any other pertinent information.	Attend and present ranking letters to reviewer small group meetings in May
Present applications as assigned at the grants review meeting.	Participate in orientation activities and review background materials on the program.	Record Panel comments and summarize recommendations for MHAA.	Attend June review meetings, if desired.
Participate in discussion.			If asked, provide clarification on pertinent facts regarding an applicant to the Panel.
Represent the Panel at MHAA meetings, presenting Panel recommendations for MHAA consideration.		Generate the ranking chart and keep up-to-date.	Participate in orientation and training activities, if desired.
Participate in orientation activities and review background materials on the program.		Lead orientation and small group sessions and provide background materials to reviewers.	

Evaluation Criteria and Scoring

MHAA publishes guidelines (https://mht.maryland.gov/Pages/MHAA/heritage-areas-resources.aspx) for the grant program, outlining the purpose, review criteria, and accompanying point assignments s for scoring and evaluation.

All applications are reviewed and scored according to the published review criteria, following a standard scoring rubric provided to all panelists.

All panelists should express their professional judgement of each proposal through their scores, written comments, and group discussion and do so with as much of an objective and unbiased perspective as possible. Applications should be evaluated on the merits of their contents and not just on how well or professionally they are written. Panelists should assess how well each application aligns with the Maryland Heritage Areas Program and the local heritage area's goals and objectives. A good proposal should:

- Demonstrate that it aligns with the priorities of the Maryland Heritage Areas Program;
- Successfully answer each required question in the application;
- Establish an achievable plan and budget to accomplish the proposed work;
- Demonstrate that the applicant will work with qualified individuals to complete the work; and
- Show that the project will have heritage tourism value.

In order to facilitate the discussions at the Grants Review Panel meetings, it is important that panelists take notes and enter comments on the applications in the reviewer portal. In addition to the score, each panelist is asked to provide pros and cons for each application to facilitate the group discussion. Good comments:

- Are presented in a constructive manner;
- Are concise, specific and understandable;
- Are specific to the individual application;
- Correlate with the rating given;
- Are framed as recommendations;
- Reflect the application's strengths and identify areas for improvement; and
- Are objective in nature and do not reflect subjective opinions.

Remember – successful AND unsuccessful applicants can use these comments to improve their awards or future applications! Panelists should approach this process as an advocate rather than a critic.

Things to avoid in scoring and commenting on applications include:

- Penalizing an applicant because the panelist feels the institution doesn't need the money – any eligible organization may apply for and receive funding, regardless of the need.
- Penalizing an applicant because the panelist feels the institution is too small or underfunded.
- Penalizing an applicant because of missing materials – program staff will take care of any missing materials and will inform panelists. If something is missing, panelists should contact staff for further guidance.
- Penalizing an applicant because their application lacks sophistication and is not written by a professional grant writer.
- Making derogatory remarks – panelists should offer suggestions for improvement rather than harsh criticism.
- Questioning an applicant's honesty or integrity. A panelist may question the accuracy of information provided by the applicant; if unsure how to phrase a concern, panelists should contact program staff.
- Offering or asking for irrelevant or extraneous information – panelist comments should concern only the information requested of applicants.

Panelists should pay attention to their own personal biases, both positive and negative, that can create a halo or pitchfork effect and impact their scores and comments. This includes prior knowledge of or experience with an applicant organization, familiarity with the project location or type, or knowledge of individuals involved in the project.

Conflict of Interest

For panelists, a conflict of interest exists if an individual panelist or a member of their immediate family during the past or upcoming 12 months:

a. Was/is actively involved in the governance of an applicant organization (as a member of a board of directors or steering committee),
b. Was/is a paid or unpaid staff member, or
c. Gained/stands to gain financially from the funding of an application under review.

Each panelist is required annually to identify all organizations with which he or she, or an immediate family member, is currently associated as a member, employee or board member. This information is kept on file at the program office.

Disclosure of affiliation with an applicant is required in order to protect MHAA, the panelists and applicants from actual, as well as the appearance of, conflict of interest. Affiliation with an applicant is to be declared before review assignments are made, and to be reiterated at the start of discussion of that application. **Panelists who have an affiliation may not join in the discussion of that application.**

Panelists shall not solicit, accept or agree to accept any gift of money, goods, loans or services, or engage in any other arrangements for personal benefit, which would improperly influence them in their panel-related duties and responsibilities.

Panelists shall not attempt to influence the vote of fellow panel members or MHAA members on applications or any other matter involving applicants with which they are affiliated.

Panelists who have reviewed an application should never represent the applicant in dealings with MHAA or other State agencies with regard to the grant application or award.

Violations of the Conflict of Interest policy may be investigated by MHAA and/or program staff. Action resulting from said investigations is at the discretion of MHAA, and may include removal from the Grants Review Panel and forfeit of the honorarium.

Confidentiality

Grants panelists may have access to confidential, proprietary, sensitive or non-public information of either the grant applicants, including applications and financial data, or of the Grants Panel, including documents, recommendations, opinions and/or conclusions. Grant panelists should treat all such information as confidential, whether or not it is identified as confidential. Do not discuss or reveal names, institutions, project activities or other information contained in the applications. Contact program staff if you have any questions concerning an application – do not contact an applicant directly.

Panelists must keep all Grants Review Panel deliberations and discussions, as well as all final recommendations for award, confidential. Grant award decisions are not final until the Maryland Heritage Areas Authority votes to approve them and are not to be made public until an official press release is issued (usually in July).

Violations of the confidentiality policy may be investigated by MHAA and/or program staff. Action resulting from said investigations is at the discretion of MHAA, and may include removal from the Grants Review Panel and forfeit of the honorarium.