



MCAAHC's African American Heritage Preservation Program Grants Review Panel Procedures and Guidelines

The Grants Review Panel of the African American Heritage Preservation 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 Historical Trust (MHT) and Maryland Commission on African American History and Culture (MCAAHC), the program's governing bodies, are distributed fairly and equitably across the State of Maryland.

About the African American Heritage Preservation Program Grant

The African American Heritage Preservation Program (AAHPP) provides grants to assist in the preservation of buildings, sites, or communities of historical and cultural importance to the African American experience in Maryland. Additional information about the program can be found here: <https://mht.maryland.gov/Pages/funding/grants-AAHPP.aspx>.

Panel Process Overview

The African American Heritage Preservation Program awards up to \$5 million in grants each year through a competitive process. Applications are reviewed for eligibility first by AAHPP staff before being distributed to the Review Panel.

Once the initial eligibility review is complete, the applications are reviewed by the 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 MHT Board at their yearly meeting in December.

Panelist Application / Nomination and Selection

Grants Review Panelists are community members with a commitment to the African American-related natural, cultural, and historical heritage of the State of Maryland, with knowledge and experience in areas relating to a broad range of corresponding fields. The African American Heritage Preservation Program strives to create a fair and impartial panel environment that is representative of the geographic, economic, and environmental 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 July – September for the upcoming grant cycle, but are accepted year-round via an online form at https://docs.google.com/forms/d/1gULcXIOgV64xtXcVHHERHZdvt_fd4D_h8kmbs4L9k8/edit. 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 skill-sets needed to review grants; specific educational and experience credentials that other panelists might not have; and geographic diversity.

Because of the need to form a well-balanced panel, AAHPP 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.

Diversity

The African American Heritage Preservation 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 geographic, economic, and environmental diversity of Maryland.

Panelists Expectations, Requirements and Time Commitment

All panelists are required to:

- Participate in an initial orientation training process when first joining the panel. Training 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 3 - 6 hours 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 September. 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 November. 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 September and October. 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 of \$100.

AAHPP 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.

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. 5 small groups of 4-5 panelists who will be assigned to review the same set of applications. AAHPP 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 and provide feedback on 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 ***Insert at later date***. Instructions on use of the online portal are available here: ***Insert at later date***

5. Program staff create a ranking list based on the scores from the assigned reviewers. 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 3-6 hour deliberation meetings in November 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	AAHPP Program Staff	AAHPP Staff Ctd.
<p>Nominated and elected by the members of the Grants Review Panel</p> <p>Preside over the Panel meetings, facilitating discussion by all Panel members.</p> <p>Review and evaluate submitted grant proposals assigned to them.</p> <p>Present applications as assigned at the grants review meeting.</p> <p>Participate in discussion.</p> <p>Represent the Panel at AAHPP meetings, presenting Panel recommendations for AAHPP consideration.</p> <p>Participate in orientation activities and review background materials on the program.</p>	<p>Review and evaluate submitted grant proposals.</p> <p>Participate in discussion.</p> <p>Attend two larger group decisions meetings in September to make final funding recommendations to AAHPP.</p> <p>Attend small group meeting with fellow reviewers and heritage areas.</p> <p>Participate in orientation activities and review background materials on the program.</p>	<p>Coordinate meeting schedules and application processing.</p> <p>Inform the Panel in matters of AAHPP policy.</p> <p>Provide clarification on pertinent facts regarding an applicant to the Panel.</p> <p>Provide information related to match, management capability, past performance, and any other pertinent information.</p> <p>Record Panel comments and summarize recommendations for AAHPP.</p> <p>Generate the ranking chart and keep up-to date.</p> <p>Lead orientation and small group sessions and provide background materials to reviewers.</p>	<p>Conduct initial eligibility review of applications.</p> <p>Attend and present Recommendations to MHT board in December.</p> <p>If asked, provide clarification on pertinent facts regarding an applicant to the Panel.</p> <p>Participate in orientation and training activities.</p>

Evaluation Criteria and Scoring

AAHPP publishes guidelines (<https://mht.maryland.gov/Pages/funding/grants-AAHPP-resources.aspx>) for the grant program, outlining the purpose, review criteria, and accompanying point assignments 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 judgment 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 Commission on African American History and Culture and the Maryland Historical Trust's goals and objectives. A good proposal should:

- Demonstrate that it aligns with the priorities of the African American Heritage Preservation 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

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 score sheet. 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 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 MCAAHC, MHT, 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 AAHPP 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 MCAAHC, MHT, or other State agencies with regard to the grant application or award.

Violations of the Conflict of Interest policy may be investigated by MCAAHC, MHT, or AAHPP program staff. Action resulting from said investigations is at the discretion of the MCAAHC and MHT, 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 Historical Trust votes to approve them and are not to be made public until an official press release is issued (usually in December or early January).

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