Maryland Heritage Areas Authority

Grants Panel

Procedures and Guidelines

The Maryland Heritage Areas Program (MHAP) Grants Panel plays a critical role in the review of grant applications submitted to the Program. The Grants Panel will help the Maryland Heritage Areas Authority ensure that the grants awarded by the Authority are distributed fairly and equitably across the State of Maryland.

About the Maryland Heritage Areas Program

The Maryland Heritage Areas Program provides grants for projects that take place in the thirteen certified heritage areas across Maryland.
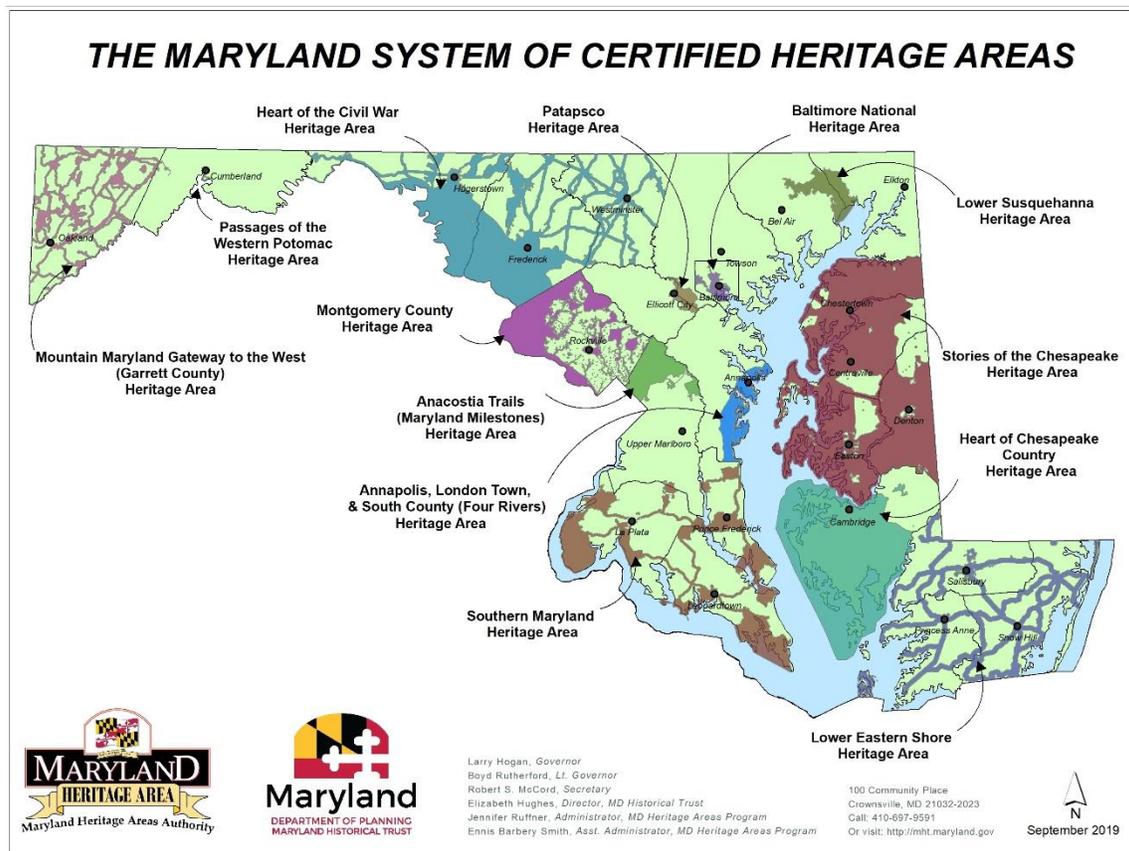
The Program supports economic development through the development of heritage tourism projects and the preservation of natural, cultural and historic resources. The three primary areas of focus for the MHAP are 1) Developing Heritage Tourism Products; 2) Building Partnerships; and 3) Sustaining Regional Identity. Additional information about the program, and the thirteen certified heritage areas, can be found here: https://mht.maryland.gov/heritageareas.shtml.

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 first by a review panel in the certified heritage area in which the project will take place. The applications received in a specific heritage area are then ranked by the local panel.

Once the local review and revision process is complete, the applications are reviewed by the state Grants Panel, the group for which this procedures and guidelines document is intended. The Grants 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 and economic development. Panel scores and discussion are used to rank the applications and make funding recommendations to the Maryland Heritage Areas Authority (MHAA). The Authority makes the final grant award decisions each year at their July meeting.

Panelist Application / Nomination and Selection

Grants panelists are community members with a commitment to the natural, cultural and historic heritage of the State of Maryland, with knowledge and experience in areas relating to a broad range of related fields. MHAP 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 Statement, below).

Applications/Nominations of prospective panelists are accepted year-round. Applications/Nominations can be made online at https://forms.gle/C88i4tb5pzVV9eSs5. The application/nomination form includes information about the individual's education, 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 the Maryland Heritage Areas Program.

Panelists should be comfortable using computers and have access to the internet, as all grant applications are submitted and reviewed online through the Reviewer Portal.

Panelists are selected by MHAP 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.

Because of the need to form a well-balanced panel, MHAP staff may not be able to consider all of the qualified people who 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 boards, grants review panels and staff, are not eligible to serve on the 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. For the initial year the Grants Panel is created, terms will be staggered to ensure that there isn't a complete turnover of membership in any given year. Panelists will be reviewed by MHAP 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.
- Read all applications assigned to them prior to the panel review meetings and complete a preliminary evaluation of the applications.
- Attend two Grants Panel deliberation meetings (10 am – 4 pm on the selected dates).

Each panelist will be assigned between 20 and 30 applications to review in May. Each panelist will be the "lead reviewer" for approximately 10 of those applications and should allow approximately 1-2 hours to evaluate each of those applications. For the remaining applications, a quicker read may be feasible, and panelists should allow approximately 30-45 minutes to review each of those applications. In addition to the time spent reading and scoring applications, each panelist will be expected to attend two day-long (10 – 4 pm) review meetings in June. As new reviewers, panelists should expect some additional hours for training and initial review of background materials.

In total panelists should expect to spend between 40 and 60 hours on MHAP 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 become better grant 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.

Activity	Estimated Time for New Reviewer	Estimated Time for Experienced Reviewer
Lead Reviewer Grant Reading	15 hours	10 hours
Additional Grant Reading	20 hours	10 hours
Two Grant Review Meetings	12 hours	12 hours
Orientation	3 hours	
Reviewing Background Materials	10 hours	5 hours
TOTAL	60 hours	37 hours

Travel Costs

Panelists serve on the Grants Panel without compensation. In order to off-set the workload, if panelists are not serving in their capacities as state employees, they are eligible to receive reimbursement for mileage and other travel costs at prevailing state rates. Travel regulations established by the State of Maryland apply to all panelists. MHAP 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 certified heritage area. All panelists must participate in an orientation process led by MHAP staff. They are also provided with access to all relevant heritage area planning documents. New panel members are assigned mentors to help them learn the ropes.

Review of Grant Applications

1. All panelists receive the full list of applications and recuse themselves from any for which they have a conflict of interest.

2. MHAP staff assign 3 panelists to review each application. Two of the panelists are assigned at random, the third is assigned based on area(s) of expertise.

3. Each application is assigned a lead reviewer, a second reviewer, and a third reviewer. The lead reviewer is expected to read the application more closely and present the application to the entire Grants Panel if there are questions; the second will need to do this if the lead reviewer is absent; the third reviewer will read and score but will not be asked to play as active a role in the presentation.

4. The three 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/pdf/mhaa/reviewerportalguide.pdf.

5. MHAP staff create a ranking list based on the scores from the three assigned reviewers plus a staff score which measures the applicant's past performance (if applicable), available matching funds and other quantitative factors, which will then be combined in an algorithm with the local heritage area ranking. The combined ranking list is circulated to the Grants Panel before the first Grants Panel meeting and will be the basis of the grant review discussion at the Panel meetings.

6. The Grants Panel holds two deliberation meetings, from 10-4 on the selected dates. At the first meeting, any local heritage area directors who are present may make a brief statement about the priorities of their heritage area and anything they particularly want the Panel to know about the applications from their heritage area. The Grants Panel will then begin discussing the final ranking of grant applications. The Grants Panel may choose to rearrange the ranking based on the group discussion.

7. At the second meeting of the Grants Panel, the final ranking and recommendations will be completed; the Panel will also 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. They will provide clear justifications as to why projects not selected for funding or the reserve list were not recommended.

8. The Grants Panel will take time at the second meeting to reflect on the grants review process, share their experiences, and make recommendations for improvement.

Responsibilities

Panel Chair	Panel Members	MHAP Staff	Local HA Staff
Preside over the panel meeting, facilitating discussion by all panel members. Review and evaluate grant proposals submitted to MHAP. Present applications as assigned at the grants review meeting. Participate in discussion. Represent the panel at MHAA meetings, presenting panel recommendations for MHAA consideration. Participate in orientation activities and review background materials on the program.	Review and evaluate grant proposals submitted to MHAP. Present applications as assigned at the grants review meeting. Participate in discussion. Make recommendations to MHAA. Participate in orientation activities and review background materials on the program.	Coordinate meeting schedules and application processing. Inform the panel in matters of MHAA policy. Provide clarification on pertinent facts regarding an applicant to the panel. Provide a staff score related to match, management capability, past performance and targeted investment criteria for capital grants. Record panel comments and summarize recommendations for MHAA. Lead orientation sessions and provide background materials to reviewers.	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. Attend Grants Panel review meetings, if desired. If asked, provide clarification on pertinent facts regarding an applicant to the panel. Participate in orientation activities, if desired.

Evaluation Criteria and Scoring

MHAA publishes guidelines
(https://mht.maryland.gov/documents/PDF/grants/Grants_MHAA_Guidelines.pdf) for the grant
program, outlining the purpose, review criteria and accompany weights for 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. Panelists should assess how well each application aligns with MHAP
and the local heritage area's goals and objectives. A good proposal should:

- Demonstrate that it aligns with the priorities of the program;
- Successfully answer each required question in the application;
- Establish an achievable plan 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, historic preservation or heritage education
  value.

In order to facilitate the discussions at the Grants Panel meetings, it is important that panelists take
notes and write comments on the applications that they are reviewing. In addition to the score, each
panelist will be asked to provide pros and cons for each application to facilitate the group discussion.
Good comments are:

- Presented in a constructive manner;
- Concise, specific and understandable;
- Specific to the individual application;
- Correlate with the rating given;
- Acknowledge the size and resources of the applicant organization; and,
- Reflect the application's strengths and identify areas for improvement.

Remember – successful AND unsuccessful applicants can use these comments to improve their awards
or future applications!

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 – MHAP staff will take care of any missing
  materials and will inform panelists. If something is missing, panelists should contact MHAP 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 MHAP staff.
- Offering or asking for irrelevant or extraneous information – panelist comments should concern only the information MHAP requests of applicants.

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 MHAP offices.

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 declare 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 MHAP-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 MHAP staff. Action resulting from said investigations is at the discretion of MHAA.

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 MHAP staff if you have any questions concerning an application – do not contact an applicant directly.