



MINISTRY OF BUSINESS,  
INNOVATION & EMPLOYMENT  
HIKINA W AKATUT

# AN OPPORTUNITY TO HOST THE NEW ZEALAND SCIENCE MEDIA CENTRE

2022  
**ASSESSMENT  
GUIDELINES**

New Zealand Government



MINISTRY OF BUSINESS,  
INNOVATION & EMPLOYMENT  
HĪKINA WHAKATUTUKI

## Ministry of Business, Innovation and Employment (MBIE) Hīkina Whakatutuki – Lifting to make successful

MBIE develops and delivers policy, services, advice and regulation to support economic growth and the prosperity and wellbeing of New Zealanders. MBIE combines the former Ministries of Economic Development, Science + Innovation, and the Departments of Labour, and Building and Housing.

### More information

Information, examples and answers to your questions about the topics covered here can be found on our website, [www.mbie.govt.nz](http://www.mbie.govt.nz), or by calling us free on 0800 20 90 20.

### Disclaimer

This document is a guide only. It should not be used as a substitute for legislation or legal advice.

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# FOREWORD

Tēnā koutou

Thank you for agreeing to assess the applications to host the New Zealand Science Media Centre. The New Zealand Science Media Centre is a unique part of the research, science and innovation (RSI) and media system in New Zealand, and the current service has proven to be an effective, trusted and globally connected service

These guidelines detail what is involved in the assessment of applications for a Host of the New Zealand Science Media Centre and the role that you will play in that process. Informed assessment of proposals is a critical aspect of our investment process, as it forms the basis of our funding recommendations.

We have selected you and other Panellists based on your knowledge and experience. You have not been selected as a 'representative' of a particular organisation or sector. The names of all Panellists and their affiliated organisations are published on our website.

The experience and expertise that you bring to the investment process is greatly appreciated. Thank you for supporting our science investment processes.

# INTRODUCTION

As an Assessor, you are critical in helping us identify the proposal that has the greatest potential to meet the objectives for hosting the New Zealand Science Media Centre investment opportunity.

These guidelines detail the assessment process and the key assessment roles and responsibilities.

We recommend that you read this document in conjunction with the Opportunity to host the New Zealand Science Media Centre Call for Proposals 2022 and other relevant information on our [webpages](#) for this hosting opportunity.

If you have any questions, feel free to contact us.

**Email**      Assessment queries: [curiousminds@mbie.govt.nz](mailto:curiousminds@mbie.govt.nz) (subject line: NZSMC)  
Investment Management System (IMS) queries: [imssupport@mbie.govt.nz](mailto:imssupport@mbie.govt.nz)

**Phone**      0800 693 778 (Monday to Friday, 8:30am to 4:30pm)

# PENALLISTS ROLES AND RESPONSIBILITIES

The following outlines the key roles and responsibilities involved in the assessment of proposals for a host of the New Zealand Science Media Centre.

Five assessors will make up the Panel and will be chaired by MBIE (non-scoring).

## ASSESSOR

Your role as one of five assessors is to assess the proposals and contribute to the Panel discussion. Your key responsibilities include:

- > Participating in an online New Zealand Science Media Panel briefing.
- > Declaring any conflicts of interest and adhering to our confidentiality and privacy policies.
- > Reading and assessing assigned proposals, allocating assessment scores that reflect your assessments (using a 7-point scoring system against the assessment criteria), and then recording your scores and supporting comments in our Investment Management System (IMS) – a secure online portal.
- > Attending an Assessment Panel meeting where:
  - > the preliminary scores and comments are reviewed
  - > proposals are scored and ranked, and
  - > advice on the assessment results is recorded by us.
- > The Assessment Panel does not have delegated authority to make investment decisions.

## PANEL CHAIR

The role of the Chair is to:

- > Prioritise the discussion of the Panel meeting taking into account advice from the Panel members and the preliminary ranked assessment scores.
- > Identify and take appropriate action over conflicts of interest.
- > Allow time for informed discussion and equitable decision-making and mediate views if required.
- > Ensure that:
  - > the Scoring system is followed, and
  - > the Assessment Panel develops the appropriate commentary on the proposals to inform a funding recommendation and to enable feedback to applicants.
- > Provide a Panel Meeting Report including a funding recommendation.
- > Confidentiality and Privacy.

The Chair will not score proposals submitted for assessment.

## Confidentiality and Privacy

To ensure confidentiality, as an assessor you must:

- > Ensure the safekeeping of all proposals and related documents (*e.g., workbooks, notes, etc.*).
- > Destroy any remaining documentation or return it to MBIE at the end of the assessment process.
- > Not correspond with or discuss the contents or assessment of any proposal with the applicant or any other party. If an applicant contacts you about a proposal:
  - > direct them to us, and
  - > email us at [curiousminds@mbie.govt.nz](mailto:curiousminds@mbie.govt.nz) (subject line: NZSMC) with the details of your contact.
- > Not use any confidential information for any purpose other than assessment.

You must agree to adhere to our confidentiality and privacy policies which apply to all personal information collected by us in IMS before you can view your assigned proposals.

## Official Information Act 1982

Proposals and their assessments are confidential. Note however that we are subject to the Official Information Act 1982 therefore information relating to an assessment may be released if we are requested to do so under the Act.

## CONFLICTS OF INTEREST

MBIE follows a rigorous process to maintain the credibility of investment decisions and to assure applicants that their proposal is fairly and reasonably appraised.

Before starting to assess, you must check your list of assigned proposals for any conflicts of interest and either accept or decline the assignments as appropriate (*see page 15 for details on how to do this*).

## WHAT IS CONSIDERED A CONFLICT OF INTEREST?

Conflicts of interest may occur on two levels; direct and indirect.

- > A direct conflict of interest would be deemed if you are:
  - > directly involved with a proposal (as a participant, manager, mentor, or partner) or you have a close personal relationship with the applicant, for example, family members, or
  - > a collaborator or in some other way involved with an applicant's proposal.
- > An **indirect** conflict of interest would be deemed if you:
  - > are employed by an organisation involved in a proposal but you are not part of the applicant's proposal
  - > have a personal and/or professional relationship with one of the applicants, for example, an acquaintance
  - > have or had involvement with a proposal that is in direct competition with a proposal being assessed or where the impacts proposed by a proposal under discussion may compete with your personal business interests.

## REPORTING IDENTIFIED CONFLICTS

All conflicts of interest must be declared to MBIE.

If you identify a direct conflict with a proposal that has been assigned to you, you must decline the assignment. If you identify an indirect conflict, email us at [curiousminds@mbie.govt.nz](mailto:curiousminds@mbie.govt.nz) (subject line: NZSMC) with the details for further discussion before accepting or declining the assignment.

## HANDLING CONFLICTS OF INTEREST DURING THE ASSESSMENT PANEL MEETING

If there is a **direct conflict** of interest with a proposal about to be discussed during the Panel meeting, declare the conflict to the Assessment Panel Chair. You will be required to leave the room during the ensuing assessment discussion.

The actions required for a declared **indirect conflict** of interest is the discretion of the Chair; this could be to:

- > leave the room
- > stay but remain silent unless asked to respond to a direct question
- > contribute to the assessment of the proposal.

Should the Chair declare a conflict of interest with a proposal, a Deputy Chair will be appointed for the ensuing assessment discussion.

All conflict of interest declarations and resulting assessor actions during the Panel meeting will be recorded.

# THE ASSESSMENT PROCESS

The key dates and an overview of the assessment process follows.

## KEY DATES

No later than 18 November 2021	Assessor Briefing
18 November 2021	Proposals assigned to Assessors
2 December 2021	Assessment recorded in IMS
8 December 2021	Assessment Panel meeting
December 2022	Applicants advised of outcome
January – 28 February 2022	Contracting Period
March 2022	Decision announced
1 July 2022	Contracts begin
1 July 2022	The New Zealand Science Media Centre operating

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*All dates are New Zealand Standard Time*

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## TIME COMMITMENT

We envisage your involvement in the assessment process to be as follows.

UP TO:	TO:
Half a day	Read through these guidelines and background documents, and participate in an online assessor briefing.
3-4 hours per proposal (up to 3 days in total)	Read your assigned proposals, assign scores and enter those scores with comment in IMS.
Up to half a day	Attend the Assessment Panel meeting in Wellington, New Zealand or online

## ASSESSOR BRIEFING

Prior to performing assessments, Assessors are required to attend a one hour online briefing session. The purpose of this session is to familiarise you with the:

- > Assessment tools and resources that are available.
- > Content of the Opportunity to Host the New Zealand Science Media Centre Call for Proposals 2022 including the structure of the application form, the assessment criteria, and the scoring guide.
- > Information about this briefing will be sent to you separately.

## HOW AND WHEN PROPOSALS ARE ASSIGNED

From **18 November 2021**, we will confirm your assigned proposals by email.

You use IMS to:

1. Log on to view your assignments, identify and notify us of any conflicts of interest and then accept or decline your assignments accordingly.
2. Open (*download and/or print*) all assigned, accepted proposals.

Refer to page 14 for further instruction on IMS.

## HOW AND WHEN ASSESSMENTS ARE RECORDED

Your assessment scores and comments are recorded in IMS. This must occur on or before **12 noon, 2 December 2021**. Assessor scores and comments will be collated and used to support discussions during the Panel meeting.

## ASSESSMENT PANEL MEETING

The Assessment Panel meets in Wellington or online on **8 December 2021**. The purpose of this meeting is to:

- > discuss the preliminary assessment scores and supporting comments
- > score and rank the proposals, and
- > form a funding recommendation for MBIE.

The Panel's discussion and moderation may take into account any additional information gathered during the assessment process. The consensus scores will be recorded by us and formally recorded in IMS. Further details on this meeting will be sent to you closer to the time.

The Assessment Panel does not have delegated authority to make investment decisions.

## RECOMMENDATIONS AND FUNDING DECISIONS

The Assessment Panel discusses and reaches a consensus about the preferred supplier, their consensus comments, and recommendations which will inform the Panel Chair's funding recommendation report.

Informed by the Panel Chair's funding recommendation, MBIE's Deputy Secretary, Labour, Science and Enterprise will make the final investment decisions.

Decisions will be publicly announced in **March 2022**. We will provide applicants with general feedback based on the Assessment Panel's comments about the overall quality of proposals.

# PERFORMING ASSESSMENTS

Use the following procedure to assess proposals.

## THE ASSESSMENT STEPS

### 1 Read and understand the assessment criteria and investment objectives and outcomes for the Call for Proposals 2022 to host of the New Zealand Science Media Centre.

Read and understand the assessment criteria detailed in these guidelines. The scoring guide and the points to note for each assessment criteria provide a common interpretation to clarify and help ensure consistency in application and understanding.

Read these guidelines in conjunction with the Opportunity to Host the New Zealand Science Media Centre Call for Proposals 2022 available on our [webpages](#) for this hosting opportunity.

### 2 Accept (or decline) assigned proposals.

Accept your assigned proposals or decline if you deem a conflict of interest exists (*see page 15 for details*).

### 3 Read assigned proposals (see page 15 for details).

### 4 Select an assessment score and record associated commentary.

Only assess the information presented in the proposal. Applicants are obliged to present the relevant information therefore if a proposal has obvious gaps, reflect this in your score and detail the significant issues in your comments.

As directed in your assignment, independently score each proposal using the assessment criteria (*see page 12 for details*).

For each criterion, select a score ranging from **1** (*low quality*) to **7** (*high quality*) from the scoring grid that best matches your assessment **AND** how well the proposal would deliver on the objectives and outcomes of this investment opportunity.

While certain sections of proposals specifically align with the assessment criteria, evaluate the proposal **as a whole** before finalising your assessment.

Record your assessment scores in IMS (*see page 16*) and comment on why you selected those scores. If the score is below 3 or above 5, your comments should include specific deficiencies or merits.

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Ensure that your comments are accurate, professional, honest, and correlate to the score and description associated with the scoring guide. Do not include names and be mindful that if requested to do so, they may be made available under the Official Information Act 1982.

Exercise your knowledge, judgement and expertise to reach clear and soundly based assessments that are fair, objective and evidence-based.

Be wary of 'drift' in your scoring. It is common for scoring to change as Assessors gain experience with the assessment process. If scoring has drifted you may want to review your scores and comments before finalising.

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### 5 Participate in an Assessment Panel meeting.

### 6 Securely destroy (or return to us) all proposals and supporting documentation when the assessment process is complete.

## THE OPPORTUNITY TO HOST THE NEW ZEALAND SCIENCE MEDIA CENTRE

The New Zealand Science Media Centre must be editorially and operationally independent responsible for its own strategic direction, operational matters and its communications and branding activities. We are now seeking applications from New Zealand organisations to Host the New Zealand Science Media and to continue the delivery of this programme for the next five years.

The New Zealand Science Media Centre:

- > fulfils a crucial need to provide accurate, evidence based information to the media. It does this through offering a trusted and independent link between scientists and researchers to journalists
- > facilitates a wider visibility of Mātauranga Māori and Kaupapa Māori research
- > ensures our research and media voices reflect our diverse population.

We are making this Call for Proposals to evaluate:

- > the provision of services a Host may have to offer
- > what opportunities exist for innovation in delivery models and hosting arrangements
- > that the Host's overheads and services are of value and cost effective (cost is not the primary criteria against which proposals will be assessed).

MBIE is responsible for implementing the Government's "A Nation of Curious Minds – A National Strategic Plan for Science in Society" ([the Plan](#)). Supporting initiatives are funded from Vote Business, Science and Innovation: Science in Society Appropriation, including a Science Media Centre. The New Zealand Science Media Centre will contribute to the outcomes set out in the Plan, by facilitating and strengthening links between the media and the science community.

## THE OBJECTIVES OF THE NEW ZEALAND SCIENCE MEDIA CENTRE

The objectives of the New Zealand Science Media Centre are to:

- > Work with the media to enhance the quality, depth and breadth of coverage of research related topics, particularly coverage of New Zealand RSI.
- > Ensure research, including Mātauranga Māori and Kaupapa Māori research, is able to be accessed by the media through meaningful and usable avenues.
- > Enable scientists, researchers and research organisations to work effectively with media by providing resources and training.
- > Encourage responsible and evidence-based science news reporting from journalists by providing resources and training.
- > Maintain networks and manage relationships between the key components of the science system, including Māori researchers and Māori research organisations, and Māori media.

## HOST REQUIREMENTS

We require the Host to:

- > Enable the delivery of the New Zealand Science Media Centre Work Programme (the Work Programme).
- > Give effect to The Treaty of Waitangi/Te Tiriti o Waitangi (Te Tiriti) through the Work Programme and activities.
- > Have priorities and strategies aligned with the objectives of the New Zealand Science Media Centre and to have respect for and uphold public media values and ethics.
- > Recognise the value the current Science Media Centre offers and commit to sustaining the programme into the future, with the opportunity to enhance the programme.
- > Have the ability to maintain a trusted programme, recognising that a New Zealand Science Media Centre is dependent on voluntary contributions from scientists and researchers (the requirement for the Host to maintain trust and credibility is critical to be able to draw on independent scientists and researchers input).
- > Have the ability to offer business continuity and provide services in a cost effective and reliable manner.
- > Continue with the structure of independent advisors which comprise scientists, researchers and media representatives.
- > Recognise that the role of the Host is not a commercial business opportunity, but is a prestigious contribution to the research and media systems in New Zealand.

## FUNDING OF THE NEW ZEALAND SCIENCE MEDIA CENTRE

Funding of the New Zealand Science Media Centre is expected to result in:

- > Increased public awareness about the role RSI can play in society.
- > An informed public when new RSI issues emerge.
- > Improved public access to New Zealand RSI content.
- > Increased public visibility of Mātauranga Māori and Kaupapa Māori research.
- > Improved information access to diverse communities with inequitable access to RSI reporting.
- > Informed public debate on RSI issues.
- > Enhanced connections between media and Kaupapa Māori researchers in RSI.

## FUNDING OF THE NEW ZEALAND SCIENCE MEDIA CENTRE HOST

Funding of the New Zealand Science Media Centre Host is expected to result in:

- > Providing an environment that enables the success of the New Zealand Science Media Centre.
- > Providing effective and efficient delivery of overhead services.

MBIE welcomes innovation in the delivery model and hosting arrangements. Critically, we expect respondents to maintain the same or similar capacity, capability, and expertise as offered by the existing Science Media Centre staff. MBIE will supply all available intellectual property of the existing Science Media Centre to the successful applicant.

# ASSESSMENT CRITERIA AND SCORING GUIDE

Use this scoring guide to help form your assessment and determine a score. When conducting your assessments, exercise your knowledge, judgement and expertise to reach clear and decisions that are sound, fair, objective, and evidence-based.

<h2>EXCELLENCE</h2> <p>50% weighting</p>		SCORE & KEYWORDS						
		1	2	3	4	5	6	7
<p>When assessing a proposal against this criterion, consider excellence as:</p> <ul style="list-style-type: none"> <li>&gt; The extent to which the proposal demonstrates how the New Zealand Science Media Centre will be editorially and operationally independent and responsible for its own strategic direction, operational matters and its communications and branding activities.</li> <li>&gt; The extent to which the proposed approach demonstrates a realistic and coherent implementation plan to enable the New Zealand Science Media Centre to operate independently to deliver on the fund objectives including through the initial implementation period.</li> <li>&gt; The understanding of the skills and competencies required of an independent New Zealand Science Media Centre team including how these support their ability to connect and work collaboratively with relevant partners in research, science and innovation, media, and Māori researchers and Māori research organisations, and respond to emerging issues. If known, identify the proposed team members and describe their role.</li> <li>&gt; The extent to which the priorities and strategies of the Host organisation are aligned with the objectives of the New Zealand Science Media Centre. Including the capacity of the Host organisation to establish and deliver an operationally and editorially independent work programme, that maintains the trust of researchers and media.</li> <li>&gt; How the proposal demonstrates value for money, particularly in relation to the assumptions and costing of overhead services and the overall budget.</li> </ul>		<p><i>(Low quality)</i> None Insufficient Not relevant No information Missing</p>	<p><i>Vague Unclear Unlikely Dubious Little relevance</i></p>	<p><i>Limited benefit/ impact Minimum acceptable level Uncertainty Lacks detail</i></p>	<p><i>Acceptable Sufficient Adequate Suitable</i></p>	<p><i>Significant Clear Multiple High level Robust</i></p>	<p><i>Certain Enduring Effective Major Comprehensive Strong Experience</i></p>	<p><i>(High quality) Excellent Exemplary Detailed Step-change Impressive</i></p>
		<p>Content is missing, irrelevant or has no potential to deliver quality services.</p>	<p>Content is missing, irrelevant or has no potential to deliver quality services.</p>	<p>Many aspects are adequately met, but with some gaps or deficiencies.</p>	<p>All aspects met to a generally adequate level.</p>	<p>All aspects are adequately met; with some strongly met.</p>	<p>All aspects are strongly met; with some met at an excellent level.</p>	<p>All aspects are met in a highly relevant, credible and exemplary manner.</p>

# IMPACT

50% Weighting

## SCORE & KEYWORDS

	1	2	3	4	5	6	7
	<p><i>(Low quality)</i> None Insufficient Not relevant No information Missing</p>	<p><i>Vague</i> <i>Unclear</i> <i>Unlikely</i> <i>Dubious</i> <i>Little relevance</i></p>	<p><i>Limited benefit / impact</i> <i>Minimum acceptable level</i> <i>Uncertainty</i> <i>Lacks detail</i></p>	<p><i>Acceptable</i> <i>Sufficient</i> <i>Adequate</i> <i>Suitable</i></p>	<p><i>Significant</i> <i>Clear</i> <i>Multiple</i> <i>High level</i> <i>Robust</i></p>	<p><i>Certain</i> <i>Enduring</i> <i>Effective</i> <i>Major</i> <i>Comprehensive</i> <i>Strong</i> <i>Experience</i></p>	<p><i>(High quality)</i> <i>Excellent</i> <i>Exemplary</i> <i>Detailed</i> <i>Step-change</i> <i>Impressive</i></p>
<p>When assessing a proposal against this criterion, consider impact as:</p> <ul style="list-style-type: none"> <li>&gt; Works with the media to enhance the quality, depth and breadth of coverage of science related topics of importance to New Zealand.</li> <li>&gt; Ensures science information is accessible to the media and meets the needs of the diverse communities of New Zealand.</li> <li>&gt; Provides resources and training to scientists and research organisations so they can work effectively with media.</li> <li>&gt; Provides resources and training to people working in the media to encourage responsible and evidence-based science news reporting.</li> <li>&gt; Develops and maintains networks and manage relationships between the key organisations in the research, science and innovation system and the media.</li> <li>&gt; Develops and maintains networks and manage relationships with Māori researchers and Māori research organisations and supports the reporting of Kaupapa Māori research.</li> </ul>	<p>Content is missing, irrelevant or has no potential to have a positive impact.</p>	<p>Content is missing, irrelevant or has no potential to have a positive impact.</p>	<p>Many aspects are adequately met, but with some gaps or deficiencies.</p>	<p>All aspects met to a generally adequate level.</p>	<p>All aspects are adequately met; with some strongly met.</p>	<p>All aspects are strongly met; with some met at an excellent level.</p>	<p>All aspects are met in a highly relevant, credible and exemplary manner.</p>

## VIEWING ASSIGNED PROPOSALS AND RECORDING ASSESSMENTS

This section details how to access the proposals assigned to you for assessment and how to record your assessment. Both of these actions are performed in IMS.

### ACCESSING IMS

To access IMS you require:

- > Chrome or Firefox.
- > Your MBIE IMS portal Username and Password.

For all IMS queries, e-mail or call: us Monday to Friday, 8:30am to 4:30pm)

- > **Email** [imssupport@mbie.govt.nz](mailto:imssupport@mbie.govt.nz)
- Phone** 0800 693 778

#### ■ To log in to IMS:

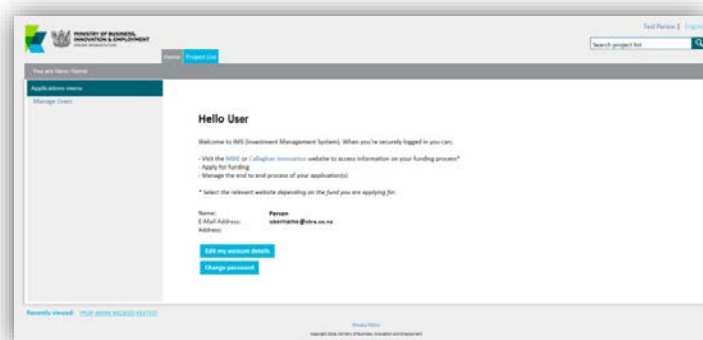
##### For first time Assessors:

1. You will receive an email containing your portal username and a temporary password. Click the **portal** link in this email. The IMS access agreement displays. This agreement details the terms and conditions governing the use of IMS.

Your temporary password will expire in 72 hours and can only be used once. The access agreement will only appear once, the first time you log in.

2. Read and accept this agreement. Once accepted, an **Edit password** screen displays.
3. Following the on screen prompts, enter your temporary password and then enter a new permanent one.
4. Click the **Save Changes** button. The **IMS Home** screen displays.

Five or more failed log in attempts will automatically lock you out of the system. If this occurs, contact the Investment Operations Team and ask for your account to be unlocked.



The IMS Home screen

##### For existing Assessors:

1. Click the **MBIE IMS Portal** link ([ims.msi.govt.nz/](https://ims.msi.govt.nz/)).
2. Type your Username and Password.
3. Click the **Login Securely** button. The **IMS Home** screen displays.

#### ■ To log out of IMS:

1. Do one of the following:
  - > Click the **Logout** hyperlink (located top right of the **Home** screen).
  - > Click the **UN** (where **UN** is your initials) located top right of assessment **Scoring** page.



## ACCEPTING/DECLINING ASSIGNED PROPOSALS

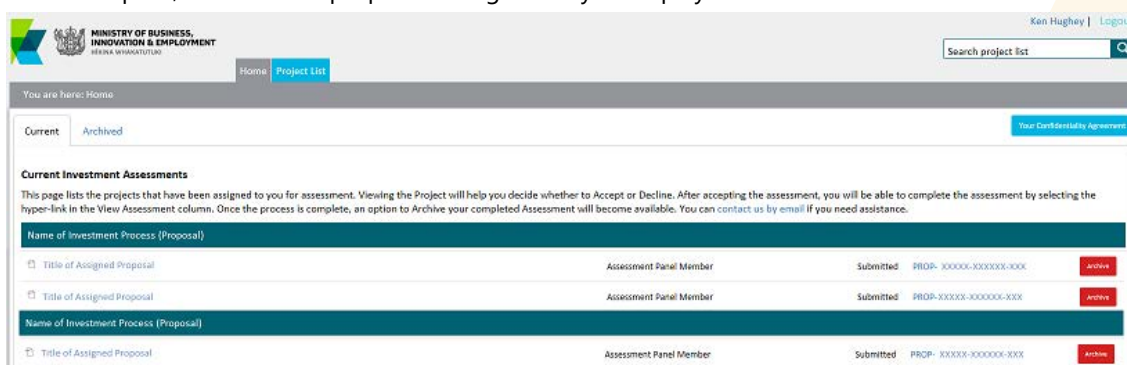
Proposals will be assigned to you for preliminary assessment **18 November 2021**.

### ■ To accept (or decline) an assignment:

1. On the **Home** tab, click the **Investment Assessment** link > **Current** tab.
2. Read and accept the confidentiality agreement. This agreement details the terms and conditions governing the assessment process.

This agreement will only display when you first access your list of assigned proposals if this is the first time you have been engaged by us to perform assessments. You can revisit this agreement at any stage by clicking the **Your Confidentiality Agreement** button located top right of the **Investment Assessment** link > **Current** tab.

3. Once accepted, the list of all proposals assigned to you displays.



4. Scroll down the list to see your assignments.  
The proposals assigned to you are listed under the **View Project** column, grouped by investment process. If you have performed assessments in the past, your new assignments will be at the top of the list under the heading **2022 New Zealand Science Media Centre Host**.
5. For the first proposal listed, click the link under **View Project**. A summary of the proposal opens in a new browser tab.
6. After reading the proposal summary, if:
  - > You deem a **direct conflict of interest** exists:
    1. Select the browser tab displaying IMS.
    2. Click the **Decline** button adjacent to the proposal.
    3. In the resulting dialog, enter the reason and click the **Save** button.  
The declined proposal is automatically removed from your assigned list.
    4. Close the summary.
  - > You deem an **indirect conflict of interest** exists, close the proposal's summary and email MBIE at [curiousminds@mbie.govt.nz](mailto:curiousminds@mbie.govt.nz) (subject line: NZSMC) to discuss further.
  - > There is **no conflict of interest**, close the summary and click the **Accept** button adjacent to the proposal.  
The proposal is allocated an **In progress** status.
7. Repeat the above steps for all the proposals in your list.

## VIEWING AND PRINTING ASSIGNED PROPOSALS

### ■ To view and print a proposal:

1. Access the **Home** tab > **Investment Assessment** page > **Current** tab.
2. Click a proposal's **View Project** link. The full proposal (*in PDF form*) displays in a separate browser tab.

- From here you can view, print and if required download the proposal to your computer to enable access without having to be logged into IMS.

The proposal's identification number is prominently displayed in the header of the proposal.

Proposals must be kept confidential. You **must**:

- > ensure the safe keeping of all proposals and related documents (*e.g., workbooks and notes, etc.*) during the assessment process
- > securely destroy all saved/printed proposals (*or return to us*) after the assessment process is completed.

## RECORDING ASSESSMENTS

Your assessments are due on or before **12 noon, 2 December 2021**.

### ■ To record your assessments:

- Access the **Home** tab > **Investment Assessment** page > **Current** tab.
- Click a proposal's **View Assessment** link. A **Scoring** page opens in a separate browser tab.

The screenshot displays the 'View Assessment' interface. At the top, the breadcrumb navigation reads 'Home > Assessments > ASMT-XXXX (Submitted)'. Below this, the project identifier 'Project: PROP-XXXX-UCMFLG-XXXXXX' is shown with a printer icon. The main content area is split into two assessment categories: 'Excellence (50%)' and 'Impact. (50%)'. Each category includes a text input field for the score and a larger text area for a comment. A left-hand navigation panel lists 'Assessment panel scores and comment' with 'Excellence (50%)' and 'Impact. (50%)' as selectable options.

You can view and print the proposal by clicking the printer icon next to the proposal's number at the top left of the Navigation panel.

You **must**:

- > ensure the safe keeping of all proposals and related documents, *e.g., workbooks, notes, etc.*
- > securely destroy all saved/printed proposals (*or return to us*) after the assessment process is completed.

- Enter your assessment scores and comments **into the relevant fields**. The areas you are required to respond to are detailed in the **Navigation** panel on the left hand side of the screen. You can either scroll down the page to view and enter all fields or click on a link in the panel for direct access.

The screenshot shows the 'ASSESSMENTS' page for a project named 'PROP-XXXX-UCMFLG-XXXXXX'. The left-hand navigation panel is titled 'Assessment panel scores and comment' and contains two links: 'Excellence (50%)' and 'Impact. (50%)'. The main content area is divided into two sections. The top section, 'Excellence (50%)', has a label 'Excellence (50%) \*' above a text input field, and 'Excellence Comment \*' above a larger text area. The bottom section, 'Impact. (50%)', has a label 'Impact. (50%) \*' above a text input field. At the bottom right of the main content area, there are two buttons: 'Save' and 'Undo'.

Your entries are automatically saved at regular intervals. A **Save and Undo** panel displays (bottom right of the screen) every time an automatic save occurs at which time you are given the opportunity to **Undo** the changes if necessary.

Ensure that your comments are accurate, professional, honest, and correlate to the score and description associated with the scoring guide. Do not include names and be mindful that if requested to do so, they may be made available under the Official Information Act. Respond only to what you have been asked to assess.

- When your assessment is complete (you have recorded your assessment rating and comment(s) into all of the fields), click the **Submit** button.
- A summary dialog displays with your assessment. If your recorded answers are satisfactory to you, click the **Save** button and then the **Submit** button. If not, click the **Back** button to return to the **Scoring** page and modify your assessment.

The **Submit** button is not active until all fields are complete. Once submitted, the proposal is automatically assigned the status **Submitted**.

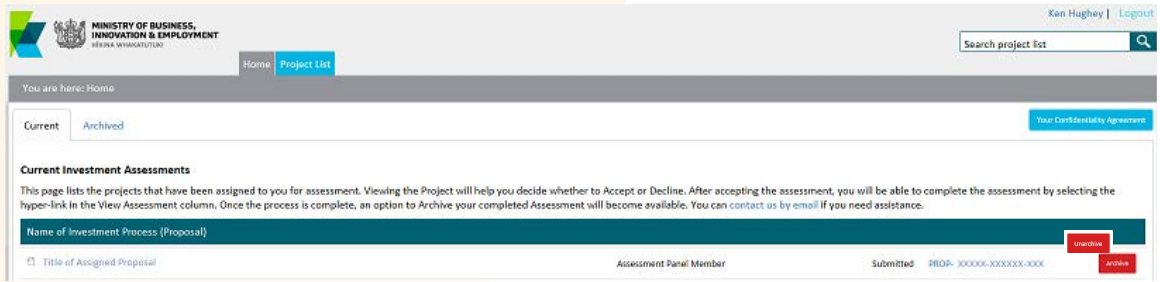
- Close the browser tab displaying the **Scoring** page and return to the tab displaying your list of assignments.

You may need to refresh the browser page to display the change in status

- For the proposal you have just scored, click the **Archive** button. The proposal is automatically removed from your list of assignments.

The screenshot shows the 'Project List' page. At the top, there is a search bar labeled 'Search project list' and a 'Logout' link for 'Ken Hughey'. Below the search bar, there are tabs for 'Current' and 'Archived'. The main content area is titled 'Current Investment Assessments' and contains a paragraph of instructions. Below the instructions is a table with the following columns: 'Title of Assigned Proposal', 'Assessment Panel Member', 'Submitted', 'PROP-XXXXXX-XXXXXX-XXXX', and 'Action'. The 'Action' column contains a red 'Archive' button.



View all archived assignments on the **Archived** tab. You can retrieve the proposal at any stage by clicking the **Unarchive** button.



Remember to securely destroy all saved/printed proposals after the assessment process is completed.

## CHECKING THE STATUS OF YOUR ASSESSMENTS

You can check the completeness of your assessment of a proposal in the left hand Navigation panel.

THE COLOURED BAR INDICATES YOU HAVE...	
	recorded a response
	yet to respond

You can also click the mouse at the top of the **Scoring** page to view a Progress bar.

A photograph of a mossy rock formation with a waterfall, tilted at an angle. The rocks are covered in vibrant green moss, and a small waterfall flows over them. The background is a dark, dense forest.

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