



MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HIKINA WHAKATUTUKI

CURIOUS
MINDS 
HE HIHIRI I TE MAHARA

UNLOCKING CURIOUS MINDS CONTESTABLE FUND



2023
ASSESSMENT
GUIDELINES

Te Kāwanatanga o Aotearoa
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.

MORE INFORMATION

Information, examples and answers to your questions about the topics covered here can be found on our website: www.mbie.govt.nz or by calling us free on: **0800 693 778**.

DISCLAIMER

This document is a guide only. It should not be used as a substitute for legislation or legal advice. The Ministry of Business, Innovation and Employment is not responsible for the results of any actions taken on the basis of information in this document, or for any errors or omissions.

ONLINE: ISBN 978-1-99-104112-8

JUNE 2022

©Crown Copyright

The material contained in this report is subject to Crown copyright protection unless otherwise indicated. The Crown copyright protected material may be reproduced free of charge in any format or media without requiring specific permission. This is subject to the material being reproduced accurately and not being used in a derogatory manner or in a misleading context. Where the material is being published or issued to others, the source and copyright status should be acknowledged. The permission to reproduce Crown copyright protected material does not extend to any material in this report that is identified as being the copyright of a third party. Authorisation to reproduce such material should be obtained from the copyright holders.

CONTENTS

MIHI.....	3
INTRODUCTION	4
ASSESSMENT ROLES AND RESPONSIBILITIES.....	5
ASSESSOR	5
MBIE	5
ASSESSMENT PANEL.....	5
ASSESSMENT PANEL CHAIR.....	6
CONFIDENTIALITY AND PRIVACY	6
CONFLICTS OF INTEREST	6
THE ASSESSMENT PROCESS AND TIMELINE	8
KEY DATES	8
TIME COMMITMENT	8
ASSESSOR BRIEFINGS	9
ALLOCATION OF PROPOSALS TO ASSESSORS	9
Assessors.....	9
UCM Assessment Panel.....	9
HOW AND WHEN ASSESSMENTS ARE RECORDED.....	10
FUNDING RECOMMENDATIONS AND DECISIONS	10
PERFORMING ASSESSMENTS	11
THE OBJECTIVES AND OUTCOMES OF THE FUND.....	12
ASSESSMENT CRITERIA AND SCORING GUIDE.....	12
ASSESSMENT CRITERIA AND SCORING GUIDE.....	13
VIEWING ASSIGNED PROPOSALS AND RECORDING ASSESSMENTS	14
ACCESSING IMS	14
ACCEPTING/DECLINING ASSIGNED PROPOSALS.....	15
VIEWING AND PRINTING ASSIGNED PROPOSALS.....	16
RECORDING ASSESSMENTS	17
CHECKING THE STATUS OF YOUR ASSESSMENTS	19
UPDATING YOUR IMS DETAILS	19

MIHI

Tēnā koutou

Thank you for agreeing to assess proposals submitted for funding from the Unlocking Curious Minds contestable fund 2023 investment round.

The Unlocking Curious Minds contestable fund, managed by the Ministry of Business, Innovation and Employment (MBIE), Hīkina Whakatutuki, aims to encourage quality projects that reach and inspire a broader base of New Zealanders through initiatives that bring science and technology to audiences that have less opportunity to learn about and to engage with science and technology. These guidelines detail what is involved in the assessment of Unlocking Curious Minds proposals and the role that you will play in that process.

Informed assessment of proposals is a critical aspect of MBIE's investment process, as it forms the basis of MBIE's funding recommendations. We have selected you and other Assessors based on your knowledge and experience. You have not been selected as a 'representative' of a particular organisation or sector. The names of all Assessors and their affiliated organisations are published on MBIE's website.

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

INTRODUCTION

As an Assessor, you are critical in helping us identify the proposals that have the greatest potential to deliver on the New Zealand Government's investment goals for the Unlocking Curious Minds contestable fund (the Fund).

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

We recommend that you read this document in conjunction with the Fund's Call for Proposals and other relevant information on the Fund's webpages.

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

Web [MBIE's Unlocking Curious Minds Contestable Fund webpages](#)

Email Proposal queries: curiousminds@mbie.govt.nz

IMS queries: imssupport@mbie.govt.nz

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

ASSESSMENT ROLES AND RESPONSIBILITIES

The following outlines the key roles and responsibilities involved in the assessment of the Fund's proposals.

ASSESSOR

Your role as an Assessor is to assess a selection of proposals submitted for funding from the Fund. Your key responsibilities include:

- Participating in an online assessor briefing.
- Declaring any conflicts of interest and adhering to our confidentiality and privacy policies.
- Reading and assessing accepted 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 strength and weakness comments in our Investment Management System (IMS) - a secure online portal.
- The UCM Assessment Panel will use the information provided by the Assessors to make funding recommendations to MBIE.

MBIE

Our key role in the assessment process is to:

- Check eligibility.
- Assign proposals for assessment.
- Address conflicts of interest.
- Informed by the Assessor scores and comments, decide on a shortlist of proposals for progression to the UCM Assessment Panel.
- Notify applicants of funding decisions.

ASSESSMENT PANEL

The role of a UCM Assessment Panel member is to:

- Participate in an online UCM Assessment Panel briefing.
- Read the shortlisted proposals.
- Attend an in person/remote Panel meeting in Wellington to discuss and ratify the shortlisted proposals, and apply portfolio balancing factors which include:
 - how well proposals meet the excellence and impact criteria for the fund
 - the range of New Zealand regions represented
 - innovative approaches to STEM engagement
 - representation of a wide range of science topics and concepts
 - inclusion of a wide range of audience experiences.

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

ASSESSMENT PANEL CHAIR

The role of the Chair is to:

- Prioritise the discussion of the Panel meeting taking into account the preliminary ranked assessment scores and any advice from Assessors.
- Identify and take appropriate action over conflicts of interest.
- Allow time for informed discussion and equitable decision-making for proposals and mediate views if required.
- Ensure that:
 - the Assessment Guidelines are followed, and
 - the Panel develops the appropriate commentary on the proposals to inform funding recommendations.
- Lead the development of a Panel Meeting Report that provides MBIE with advice regarding the Fund, including funding recommendations.

CONFIDENTIALITY AND PRIVACY

To ensure confidentiality, 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 (curiousminds@mbie.govt.nz) 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.

If you are from a University or Crown Research Institute or other large organisation, you may assist in the assessment of a proposal from that institution providing you have no direct or limited indirect interest in the proposal. If in doubt, declare and discuss with us.

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 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 UCM 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 AND TIMELINE

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

KEY DATES

- By 2 September 2022.....Assessor briefing
 - By 8 September 2022.....Proposals assigned
 - By 12 noon, 29 September 2022.....Assessor assessments and scores recorded in IMS
 - From 30 September 2022.....Applications shortlisted for progression to the UCM Assessment Panel
 - Early October 2022.....UCM Assessment Panel briefing
 - Late October 2022.....UCM Assessment Panel meeting
 - November 2022.....Funding decisions announced and applicant feedback
- All dates are NZ Standard Time.

TIME COMMITMENT

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

ASSESSOR	UCM ASSESSMENT PANEL MEMBER
<ul style="list-style-type: none"> Half a day to read through these guidelines and background documents and participate in an Assessor Briefing. 1-2 hours per proposal to read your assigned proposals, assign preliminary scores and enter those scores with comment in IMS (an estimate of 4 days in total). 	<ul style="list-style-type: none"> Half a day to read through guidelines and background documents and participate in a Panel Briefing. One day to review shortlisted proposals, assessment scores and comments, and prepare for the panel meeting. Full day to attend an in-person panel meeting Panel Chair: Half a day for follow up report writing, supported by an MBIE Investment Manager

ASSESSOR BRIEFINGS

Prior to performing assessments, Assessors and UCM Assessment Panel members are required to attend online briefing sessions. The purpose of these sessions is to introduce and outline the:

- Assessment process, roles, responsibilities, and requirements.
- Tools and resources that are available to them including the online scoring system.
- Content of the call for proposals including the structure of the proposal form and the assessment criteria.
- Key changes to the process for the current round.

Information about these briefings will be sent to attendees separately.

ALLOCATION OF PROPOSALS TO ASSESSORS

ASSESSORS

Proposals that meet the eligibility criteria are assigned to Assessors in part by aligning the proposal with Assessor expertise, availability, and absence of any potential conflict of interest. Together with the number of proposals submitted, this alignment determines the type and number of proposals that are assigned to an Assessor. Each proposal is assigned to three Assessors.

From 3 September 2022, we will confirm your role and inform you of your assigned proposals by email.

You use IMS to:

1. Log on to view your assignments, identify and notify MBIE 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.

UCM ASSESSMENT PANEL

Informed by the Assessor scores and comments, MBIE will form a shortlist of proposals for approval by the General Manager of the Science System Investment and Performance Branch, for progression to the UCM Assessment Panel.

The minimum cut off for this shortlist will be determined by those proposals with a total median weighted assessment score above the point at which the sum of funds requested reaches a minimum of 1.5 times the available funding.

HOW AND WHEN ASSESSMENTS ARE RECORDED

Assessor assessment scores and comments are recorded in IMS. This must occur on or before 12 noon, 29 September 2022.

The UCM Assessment Panel Meeting discussion is recorded by MBIE. The Chair then leads the development of a Panel Meeting Report that provides MBIE with advice regarding the Fund, including funding recommendations.

FUNDING RECOMMENDATIONS AND DECISIONS

The Assessment Panel Chair will provide us with a report with the Panel's advice on which proposals should be funded. The final funding decision will be made by the General Manager of the Science System Investment and Performance Branch in the Labour, Science and Enterprise Group, MBIE. Decisions will be publicly announced in November 2022.

When decisions are announced, we will provide the proposal's primary contact person with:

- information as to where their proposal sat in terms of percentiles
- comments from Assessors on the strengths and weaknesses of the proposal
- whether their proposal was shortlisted and progressed to the Assessment Panel.

A list of successful applicants along with their public statements will be published on the [Fund's webpages](#) and announced via a press release.

PERFORMING ASSESSMENTS

The following details further the steps for an Assessor in the assessment of funding proposals. Your assessment is important as it informs our decisions on which proposals progress through to the UCM Assessment Panel.

1. Read and understand the assessment criteria and the objectives and outcomes of the Fund.

Read these guidelines in conjunction with the Fund's 2023 Call for Proposals. Read and understand the assessment criteria and scoring guide detailed in these guidelines.

This guide provides a common interpretation to clarify and help ensure consistency in application and understanding.

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 on how to do this.
3. Read assigned proposals (see page 16 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.

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 17) and comment on why you selected those scores. If you have recorded a score below 3 or above 5, comments should include specific deficiencies or merits.

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.

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.

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

THE OBJECTIVES AND OUTCOMES OF THE FUND

THE FUND'S OBJECTIVES

The Fund supports projects that help New Zealanders, particularly those that have fewer opportunities to learn about and to engage with science and technology, by:

- Funding education and community outreach initiatives that focus on science and technology.
- Broadening their ability to engage with science and technology.
- Promoting the relevance of science and technology in their lives.
- Supporting them to engage in societal debate about science and technology issues facing the country.

THE FUND'S OUTCOMES

To enable:

- New Zealanders to understand the relevance of science and have the ability to use science to make informed decisions.
- Greater interest and uptake of higher education in science, technology, engineering, and mathematics (STEM).
- Increased knowledge and visibility of different research methodologies, including kaupapa Māori approaches and Pacific-centred research methods.
- Engagement with Mātauranga Māori as a knowledge system.
- The research, science and innovation system to connect to communities and respond to their needs.

ASSESSMENT CRITERIA AND SCORING GUIDE

To assess, read and understand the assessment criteria and use the scoring guide on the following page to help form your assessment and determine a score.

The scoring guide and the points to note for each assessment criteria provide a common interpretation that aims to clarify and help ensure consistency in both application and understanding.

When conducting your assessments, exercise your knowledge, judgement, and expertise to reach clear and soundly based decisions that are fair, objective and evidence based.

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.

ASSESSMENT CRITERION: EXCELLENCE (50% Weighting)	SCORE & KEYWORDS						
	1	2	3	4	5	6	7
<p>When assessing a proposal against the Excellence criterion, consider excellence as:</p> <ul style="list-style-type: none"> The extent to which the project plan demonstrates a realistic and coherent strategy, novel methods, scientific rigour, delivers value for money, and outlines a clear work programme with defined relevance to the target audience. The quality of the project team and their ability to connect and work collaboratively with the target audience. This includes evidence of linkages with relevant partners, in both the community and scientific field of engagement, and, where relevant, Māori involvement, and any co- funding considerations. 	<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>
	Content is missing, irrelevant or has no potential to deliver a quality project.	Many aspects are missing, have low relevance, or have little potential.	Many aspects are adequately met, but with some gaps or deficiencies.	All aspects met to a generally adequate level.	All aspects are adequately met; with some strongly met.	All aspects are strongly met; with some met at an excellent level.	All aspects are met in a highly innovative, relevant, credible, and exemplary manner.
ASSESSMENT CRITERION: IMPACT (50% Weighting)	SCORE & KEYWORDS						
1	2	3	4	5	6	7	
<p>When assessing a proposal against the Impact criterion, consider impact as:</p> <ul style="list-style-type: none"> The extent to which the project broadens the ability of the target audience to engage with science and technology, and responds to their needs, with clear indicators of how success will be measured. The extent to which the project promotes and increases the visibility of science, and different research methodologies, in the wider community with clear indicators of how success will be measured. The extent to which the project promotes and increases the visibility of higher education and science career pathways. The ability to reflect Te Ao Māori by demonstrating aspects of Māori centred research, kaupapa Māori research methodologies and enablement of mātauranga methods appropriately and respectfully. The ability to reflect other knowledge systems where appropriate such as Pacific-centred research. Evidence of impact and the credibility of the project approach to demonstrate that impact. 	<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>
	Content is missing, irrelevant or has no potential to have a positive impact.	Many aspects are missing, have low relevance, or have little potential.	Many aspects are adequately met, but with some gaps or deficiencies.	All aspects met to a generally adequate level.	All aspects are adequately met; with some strongly met.	All aspects are strongly met; with some met at an excellent level.	All aspects are met in a highly innovative, relevant, credible, and exemplary manner.

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 actions are performed in IMS

For all IMS queries, e-mail imssupport@mbie.govt.nz or call 0800 693 778 (Monday to Friday, 8:30am to 4:30pm).

ACCESSING IMS

► Log in to IMS

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

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** tab displays.


The screenshot shows the IMS Home page. At the top, there is a navigation bar with 'Home' and 'Project List' tabs. A search bar for the project list is located in the top right corner. The main content area features a 'Hello User' greeting, a welcome message, and a list of instructions: 'Visit the MBIE or Callaghan Innovation website to access information on your funding process*', 'Apply for funding', and 'Manage the end to end process of your application(s)'. Below this, there is a section for account details with fields for Name, E-Mail Address, and Address, and buttons for 'Edit my account details' and 'Change password'. The footer contains a 'Recently viewed' section with a link to a proposal and a 'Privacy Policy' link.

For existing Assessors:

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

► **Logout of IMS**

Do one of the following:

1. Click the **Logout** hyperlink (located top right of every tab).
2. Click the  (where *UN* is your initials) located top right of assessment **Scoring** page.

ACCEPTING/DECLINING ASSIGNED PROPOSALS

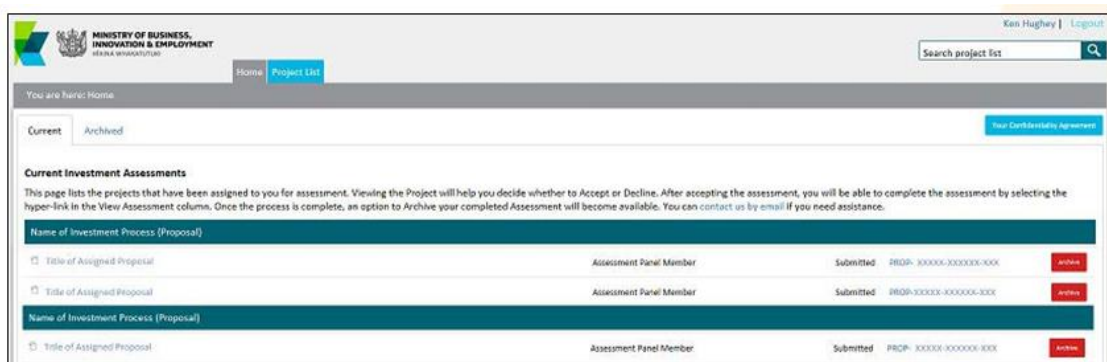
Proposals will be assigned to you for preliminary assessment by **8 September 2022**.

► **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 **2023 Unlocking Curious Minds Fund (Proposals)**.

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 us at curiousminds@mbie.govt.nz to discuss further.
 - There is **no conflict of interest**, close the summary and click the **Accept** button adjacent to the proposal.

The assessment 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.
3. 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, 29 September 2022**.

► To record your assessments:

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

The screenshot shows a web interface for recording assessments. The top navigation bar includes the Ministry of Business, Innovation & Employment logo and the breadcrumb 'Home > Assessments > ASMT-XXXXX (Submitted)'. Below the navigation, the 'Project: PROP-XXXX-UCMFLG-XXXXXX' is displayed. The main content area is divided into two sections: 'Assessment panel scores and comment' on the left and the scoring details on the right. The left panel has a list with 'Excellence (50%)' selected and 'Impact. (50%)' below it. The right panel has two main sections: 'Excellence (50%)' and 'Impact. (50%)'. Each section contains a text input field for the score and a larger text area for comments. An arrow points from the 'Excellence (50%)' link in the left panel to the corresponding input fields on the right.

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 once the assessment process is complete.

3. 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.

This screenshot is identical to the previous one, showing the assessment scoring interface. The only difference is the presence of a 'Save' button at the bottom right of the page, next to a 'UNDO' button.

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.

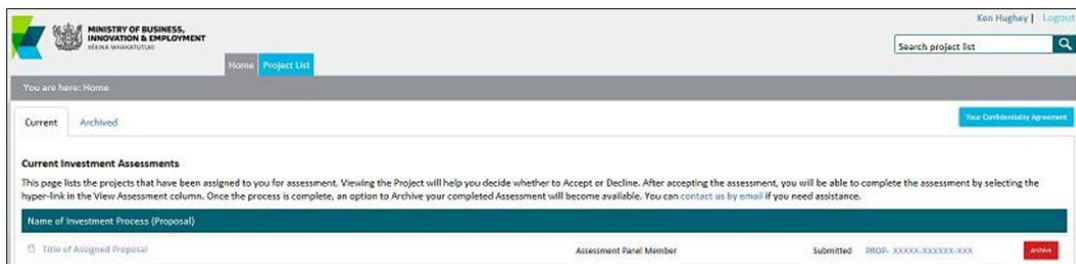
- Record a brief comment (between 25-50 words), regarding the main strength and the main weakness of the proposal for feedback to applicants.
- When your assessment is complete (you have recorded your assessment rating and comment(s) into all of the fields), click the **Submit** button.
- A summary dialog 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.





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

Check the completeness of your assessment of a proposal by looking at the left-hand Navigation panel

THE COLOUR 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.

UPDATING YOUR IMS DETAILS


From the **Home** screen in IMS, you can maintain your details as and when required.

► To view and/or update your details:

1. Click the **Edit My Assessor Profile** button on the **Home** tab.
2. Update your details as required and click **Save**.

► To change your password:

1. Click the **Change password** button on the **Home** tab.
2. Enter your new password and click **Save**.

You can also access these details by clicking  button (where UN is your initials) located top right of assessment scoring pages.



FOR MORE INFORMATION VISIT US
ONLINE AT WWW.MBIE.GOVT.NZ

PUBLISHED BY THE MINISTRY OF
BUSINESS, INNOVATION & EMPLOYMENT