

Unlocking Curious Minds Contestable Fund

# Assessment Guidelines

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2020 Investment Round

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Published August 2019

# Foreword

Tēnā koutou

Thank you for agreeing to assess proposals submitted for funding from the Unlocking Curious Minds contestable fund 2020 investment round.

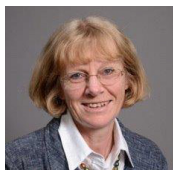
The Unlocking Curious Minds contestable fund, managed by the Ministry of Business, Innovation and Employment (MBIE), Hikina Whakatutuki, aims to encourage innovative, quality projects that enhance or broaden the connection and engagement of 'harder-to-reach' New Zealanders with science and technology. 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.



**Dr. Prue Williams**



**GENERAL MANAGER,**  
Science System Investment and Performance  
Ministry of Business, Innovation & Employment



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# Introduction

As an Assessor, you are critical in helping MBIE 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.

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

We recommend that you read this document in conjunction with the Unlocking Curious Minds Contestable Fund Call for Proposals and other relevant information at <http://www.curiousminds.nz/ucm>.

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

### Curious Minds

**website** <http://www.curiousminds.nz/ucm>

**Email** Assessment queries: [curiousminds@mbie.govt.nz](mailto:curiousminds@mbie.govt.nz)  
Portal queries: [imssupport@mbie.govt.nz](mailto: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 Unlocking Curious Minds proposals.

## Assessor

Your role as an Assessor is to assess a selection of proposals submitted for funding from the Unlocking Curious Minds contestable fund. Your key responsibilities include:

- > Participating in an Assessor briefing.
- > Declaring any conflicts of interest and adhering to MBIE's 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 MBIE's 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 MBIE. Note that the Assessment Panel does not have delegated authority to make funding decisions.

## Lead Assessor

In addition to the responsibilities of an Assessor, you will be asked to be a Lead Assessor for a selection of proposals. During the Assessment Panel meeting, you then introduce and lead the discussion on those proposals.

## Assessment Panel Chair

The Chair must:

- > 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 Panel follows the scoring system and provides sound advice.
- > Ensure that the Assessment Panel develops appropriate commentary on proposals to inform funding recommendations and to enable appropriate feedback to Applicants.
- > Provide a Panel report to MBIE.

## 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 MBIE ([curiousminds@mbie.govt.nz](mailto:curiousminds@mbie.govt.nz)), and
  - email MBIE with the details of your contact.
- > Not use any confidential information for any purpose other than assessment.

All Assessors must agree to adhere to MBIE's confidentiality and privacy policies which apply to all personal information collected by MBIE in the IMS portal before they can view their assigned proposals.

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### Official Information Act 1982

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

### Conflicts of Interest

MBIE follows a rigorous process to maintain the credibility of investment decisions and to assure Applicants that their proposals are 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 13 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, e.g., family members, OR
  - a collaborator or in some other way involved with an Applicant’s work programme.
- > 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 work programme.
  - have a personal and/or professional relationship with one of the Applicants, e.g., 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 proposals from that institution providing you have no direct or limited indirect interest in the proposal. If in doubt, declare and discuss with MBIE.

#### Reporting Identified Conflicts

**All conflicts of interest must be declared to MBIE.**

If you identify a clear and direct conflict with a proposal that has been assigned to you, you must decline the assignment. If you identify an indirect conflict, email MBIE at [curiousminds@mbie.govt.nz](mailto: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 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 Assessment Panel 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

Assessor briefing	Late August/early September
Proposals assigned	24 September 2019
Assessment recorded in the IMS portal	12 noon, 17 October 2019
Assessment Panel meeting	22 - 23 October 2019
MBIE's General Manager, Science System Investment and Performance makes funding decisions	November 2019

*All dates are New Zealand Standard Time*

## 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 Assessor Briefing via teleconference or in person.
1-2 hours per proposal (est. 3 days)	Read your assigned proposals, assign scores and enter those scores with comment in the IMS portal.
2 days	Attend the Assessment Panel meeting in Wellington, New Zealand.

## Assessor Briefing

Prior to performing assessments, Assessors are required to attend a two hour briefing session in person or via teleconference. The purpose of this session is to familiarise Assessors with the:

- > 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 this briefing will be sent to attendees separately.

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### How and When Proposals are Assigned

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 multiple Assessors, one of which is designated the Lead Assessor.

From **24 September 2019**, MBIE will confirm your role and inform you of your assigned proposals by email.

You use MBIE's IMS portal 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 12 for further instruction on the IMS portal.

### How and When Assessments are Recorded

Your assessment scores and comments are recorded in the IMS portal. This must occur on or before **12 noon, 17 October 2019**. 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 on **22 and 23 October 2019** to discuss the preliminary ranked assessment scores and supporting comments.

The Lead Assessor for a proposal introduces the proposal at the meeting. The Lead Assessor, and other Assessment Panel members assigned to the proposal, present their rationale for their scoring and any comments they have including those from Assessors not participating in the meeting. The entire Panel then discusses the proposal and preliminary scoring to arrive at a consensus score, and consensus comment for the proposal.

The Panel's discussion and moderation may take into account the mix of proposals that are considered for funding for local grants and regional/national grants, the distribution of proposals by region and local area, and the target groups. The split of the total available funding has not been fixed between the two different types of grants.

MBIE records the discussion, the consensus scores, a consensus comment and the Panel's recommendations on individual proposals and the portfolio as a whole.



## Recommendations and Funding Decisions

The Assessment Panel Chair will provide MBIE with a recommendation report as to which proposals should be funded. MBIE will then review the report and recommend how funding should be allocated to successful proposals.

The final decision on which proposals will be funded will be made by the General Manager of the Science System Investment and Performance Branch in the Labour, Science and Enterprise Group, MBIE. This decision:

- > Will be informed by the Assessment Panel's recommendation report
- > Will take into account:
  - the overall mix of proposals to ensure that there is a mix of delivery approaches
  - geographic locations
  - science and technology topics and projects that target a wide variety of audiences
  - any other information that it deems relevant.
- > May be contingent on:
  - pre-contractual conditions which must be met before the investment is contracted
  - special conditions in addition to the general terms and conditions set out in the Fund's Funding Agreement
  - a variation to the proposed term of a proposal
  - a variation to the funding allocated from that proposed and requirement that the proposed project plan be negotiated to MBIE's satisfaction to reflect the changed funding.

MBIE will advise the proposal's primary contact person of the funding decisions in **November 2019**. The successful applicants will be published on [MBIE's Unlocking Curious Minds Contestable Fund webpages](#) and the [Curious Minds website](#) and announced via a press release. MBIE provides general feedback based on the Assessment Panel's comments about the overall quality of all proposals.

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## Performing Assessments

Use the following procedure to assess proposals.

### The Assessment Steps

#### 1 Read and understand the assessment criteria and the objectives and outcomes of the Unlocking Curious Minds contestable fund.

Read and understand the assessment criteria detailed in these guidelines. This includes the scoring guide and the objectives and outcomes of the Unlocking Curious Minds contestable fund (*see over*). 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 Unlocking Curious Minds Call for Proposals available at <http://www.curiousminds.nz/ucm>.

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

Accept your assigned proposals or decline if you deem a conflict of interest exists. *See page 13 for details on how to do this.*

#### 3 Read assigned proposals (*see page 14 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 10*).

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 the Unlocking Curious Minds contestable fund.

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 the IMS portal (*see page 14*) and comment on why you selected those scores. Your comments should also identify if applicable the specific reasons for a deficiency, particularly if you are recording a score of 4 or less.

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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.
- if assessing excellence, only comment on excellence, if assessing impact, only comment on impact.

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.

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#### 5 Destroy (or return to MBIE) all proposals and supporting documentation when the assessment process is complete.

### Unlocking Curious Minds Contestable Fund Objectives

The Unlocking Curious Minds contestable fund supports projects that use innovative and/or best-practice approaches to 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.

### Unlocking Curious Minds Contestable Fund Outcomes

The outcomes of the Unlocking Curious Minds contestable fund are to have:

- > Science and technology-competent learners, and a greater number of people choosing science, technology, engineering and mathematics career pathways
- > A scientifically and technologically engaged public and a publically engaged science sector
- > A more skilled workforce and more responsive science and technology to meet the needs of New Zealand.

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## The 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	WEIGHTING
<p data-bbox="280 1016 316 1301" style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>EXCELLENCE</b></p> <p data-bbox="352 701 1007 730">When assessing a proposal, MBIE will consider excellence as:</p> <ul style="list-style-type: none"> <li data-bbox="352 741 1262 831">&gt; Whether a coherent strategy and project plan is identified, including clear outcomes, how outcomes will be achieved, and how success will be measured.</li> <li data-bbox="352 842 1270 931">&gt; Whether the project idea is relevant to the current issues and needs of the target audience and involves innovative approaches and engagement methods, appropriate for the target audience.</li> <li data-bbox="352 943 1302 1010">&gt; Whether it is clear that the science and technology component of the project will be managed to maintain scientific rigour and accuracy.</li> <li data-bbox="352 1021 1225 1088">&gt; The quality of the project team – including skills mix, available support, resources, experience and track record.</li> <li data-bbox="352 1099 1166 1128">&gt; Whether the idea can be delivered within the required timeframe.</li> <li data-bbox="352 1140 1182 1169">&gt; The ability of the project team to connect with the target audience.</li> <li data-bbox="352 1180 1246 1270">&gt; If relevant, the strength of linkages with relevant partners and others involved in science and technology engagement in the relevant area and field of engagement.</li> <li data-bbox="352 1281 1070 1310">&gt; Whether the project demonstrates good value for money.</li> </ul>	<p data-bbox="1350 701 1406 730"><b>50%</b></p>
<p data-bbox="280 1794 316 1966" style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>IMPACT</b></p> <p data-bbox="352 1339 1027 1368">When assessing a proposal, MBIE will consider impact as:</p> <ul style="list-style-type: none"> <li data-bbox="352 1379 1193 1447">&gt; Whether the project is likely to contribute to the Fund objective and outcomes.</li> <li data-bbox="352 1458 1289 1547">&gt; Whether the project is targeted toward a clearly defined target audience for whom there are opportunities and benefits for increased engagement with science and technology.</li> <li data-bbox="352 1559 1294 1715">&gt; Whether the successful delivery of the project is likely to deliver positive change in the way the target audience engages with science and technology so that science and technology becomes more important or relevant for them and/or they are able to engage societal debate about science and technology issues.</li> <li data-bbox="352 1727 1270 1794">&gt; Where possible, the extent to which the project will leverage off other organisations, resources, and/or initiatives, to maximise existing resources.</li> <li data-bbox="352 1805 1270 1872">&gt; <b>For Regional/National Grants only:</b> The extent of collaboration with other organisations and other initiatives/resources to deliver the project.</li> <li data-bbox="352 1883 1302 1928">&gt; <b>For refocused and previously funded projects:</b> Evidence of impact, where available, and the credibility of the systems used to demonstrate that impact.</li> </ul>	<p data-bbox="1350 1339 1406 1368"><b>50%</b></p>

SCORING GUIDE					
SCORE	KEY WORDS	EXCELLENCE	Weighting: 50%	IMPACT	Weighting: 50%
<b>1</b> <i>(Very low)</i>	<i>None Insufficient Not relevant No information Missing</i>	Content is missing, irrelevant or has no potential to deliver a quality project.		Content is missing, irrelevant or has no potential to have a positive impact.	
<b>2</b> <i>(Low)</i>	<i>Vague Unclear Unlikely Dubious Little relevance</i>	Many aspects are missing, have low relevance, or have little potential.		Many aspects are missing, have low relevance, or have little potential.	
<b>3</b> <i>(Below average)</i>	<i>Limited benefit / impact Minimum acceptable level Uncertainty Lacks detail</i>	Many aspects are adequately met, but with some gaps or deficiencies.		Many aspects are adequately met, but with some gaps or deficiencies.	
<b>4</b> <i>(Average)</i>	<i>Acceptable Sufficient Adequate Suitable</i>	All aspects met to a generally adequate level.		All aspects met to a generally adequate level.	
<b>5</b> <i>(Above average)</i>	<i>Significant Clear Multiple High level Robust</i>	All aspects are adequately met; with some strongly met.		All aspects are adequately met; with some strongly met.	
<b>6</b> <i>(High)</i>	<i>Certain Enduring Effective Major Comprehensive Strong Experience</i>	All aspects are strongly met; with some met at an excellent level.		All aspects are strongly met; with some met at an excellent level.	
<b>7</b> <i>(Very high)</i>	<i>Excellent Exemplary Detailed Step-change Impressive</i>	All aspects are met in a highly innovative, relevant, credible and exemplary manner.		All aspects are met in a highly innovative, relevant, credible and exemplary manner.	

**NOTE:**

- > The activities proposed for funding will lift levels of understanding and engagement with science and technology in “harder to reach” groups. They will also show strong evidence to support the rationale for the target group identified.

Hard to reach audiences include, but are not limited to, youth, Māori and Pasifika, and rural New Zealanders.

- > The activities and items proposed for funding are directly related to promoting or delivering the project.
- > In considering the assessment criteria set out above, reference should be made to the other requirements and conditions for the Unlocking Curious Minds contestable fund as set out in the Call for Proposals.

## 12

# 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 MBIE's IMS portal.

## Accessing the IMS Portal

To access the portal you require:

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

For portal support, contact MBIE's Investment Operations Team Monday to Friday between 8.30am and 4.30pm:

- > email [imssupport@mbie.govt.nz](mailto:imssupport@mbie.govt.nz)
- > call 0800 693 778

### ■ To log in to the IMS portal:

#### For first time Assessors:

1. You will receive an email containing your portal username and a temporary password. Copy and paste the **portal** link into Chrome or Firefox. The IMS portal's access agreement displays. This agreement details the terms and conditions governing the use of the portal.

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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.

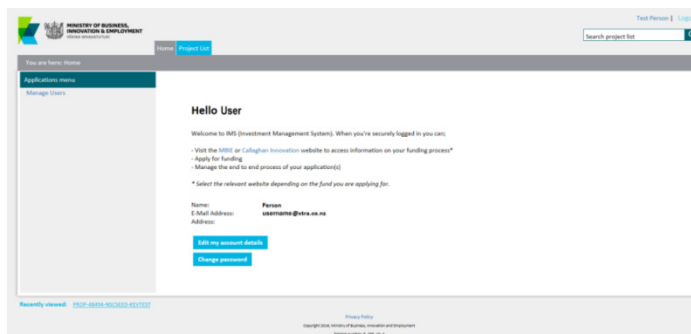
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2. Read and accept this agreement. Once accepted, an **Edit password** screen displays.
3. Following the on screen prompts, enter your temporary password and then enter a new permanent one.
4. Click the **Save Changes** button. The portal's **Home**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

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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.

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The Home page of the MBIE IMS portal

#### For existing Assessors:

1. Copy and paste the **MBIE IMS Portal** link ([ims.msi.govt.nz/](https://ims.msi.govt.nz/)) into Chrome or Firefox.
2. Type your Username and Password.
3. Click the **Login Securely** button. The portal's **Home** screen displays.

### ■ To log out of the portal:

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

UCM proposals will be assigned to you for preliminary assessment **24 September 2019**. Additional proposals may be assigned to you after this period as a result of adjustments required due to any declared conflict of interests.

### ■ 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 to first time Assessors when they first access their list of assignments. 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.

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

3. Scroll down the list to see your assignments.  
The Unlocking Curious Minds 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 **2020 Unlocking Curious Minds Fund – Local and Regional/National Grants (Proposals)**.
4. For the first proposal listed, click the link under **View Project**. A summary of the proposal opens in a new browser tab.
5. After reading the proposal summary, if:
  - › You deem a **direct conflict of interest** exists:
    1. Select the browser tab displaying the IMS portal.
    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 proposal's 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) 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.
6. Repeat the above steps for all the proposals in your list.

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## 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 the portal.

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The proposal 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.
  - destroy all saved/printed proposals (*or return to MBIE*) after the assessment process is completed.
- 

## Recording Assessments

Your assessments are due on or before **12 noon, 17 October 2019**.

### ■ 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 displays the 'View Assessment' page. At the top, the navigation path is 'Home > Assessments > ASMT-XXXX (Submitted)'. On the left, a sidebar shows the project ID 'PROP-XXXX-UCMFLG-XXXXXX' and a list of assessment categories: 'Excellence (50%)' and 'Impact. (50%)'. A red arrow points to a printer icon next to the project ID. The main area contains two assessment sections. The 'Excellence (50%)' section has a score input field and a text area for 'Excellence Comment \*'. The 'Impact. (50%)' section has a score input field.

You can view and print the proposal by clicking the printer icon next to the proposal 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.*
  - destroy all saved/printed proposals once the assessment process is complete.
-



- 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 assessment interface for a project. The header includes the Ministry of Business, Innovation & Employment logo and the breadcrumb 'Home > Assessments > ASMT-XXXX (Submitted)'. The project ID is 'PROP-XXXX-UCMFLG-XXXXXX'. The left navigation panel shows 'Assessment panel scores and comment' with 'Excellence (50%)' selected. The main content area has two sections: 'Excellence (50%)' with a score input field and a comment text area, and 'Impact (50%)' with a score input field. A 'Save and Undo' panel is located at the bottom right.

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.

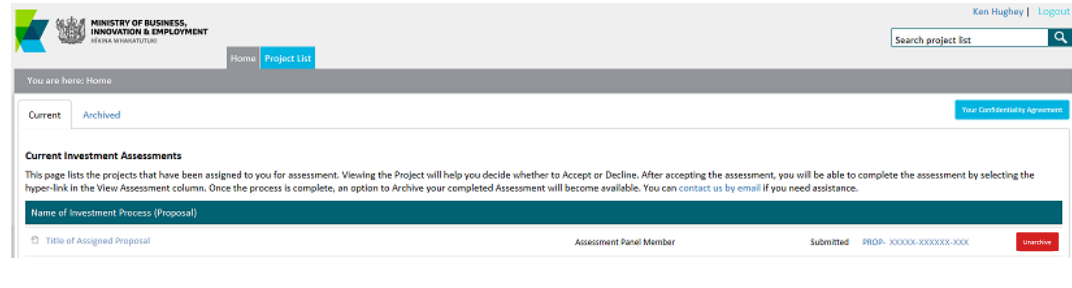
You may need to refresh the browser page to display the change in status.

- 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. The header includes the Ministry of Business, Innovation & Employment logo and the breadcrumb 'Home > Project List'. The user is logged in as 'Ken Hughey'. There is a search bar for 'Search project list'. The main content area has a 'Current' tab selected and a 'Your Confidentiality Agreement' link. Below is a section for 'Current Investment Assessments' with a brief description. A table lists the assessments with columns for 'Name of Investment Process (Proposal)', 'Assessment Panel Member', 'Submitted', and 'Archive'. A red 'Archive' button is visible next to a row.

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



Remember to 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.

## Updating Your IMS Portal Details

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

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>■ <b>To view and/or update your details:</b></li> <li>1. Click the <b>Edit My Assessor Profile</b> button on the <b>Home</b> tab.</li> <li>2. Update your details as required and click <b>Save</b>.</li> </ul> | <ul style="list-style-type: none"> <li>■ <b>To change your password:</b></li> <li>1. Click the <b>Change password</b> button on the <b>Home</b> tab.</li> <li>2. Enter your new password and click <b>Save</b>.</li> </ul> |
|--|--|

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

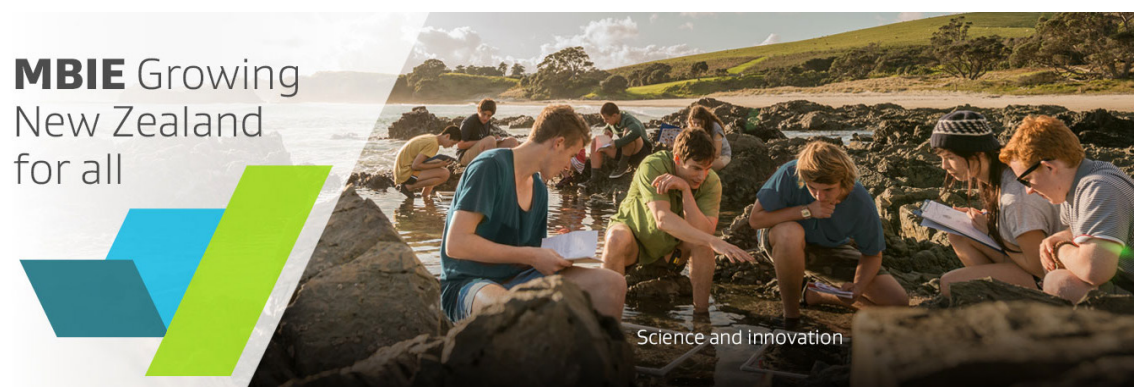
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New Zealand's science and innovation systems are critical to boosting the number of knowledge-intensive, internationally-connected firms.

The Ministry of Business, Innovation & Employment (MBIE) works to lift business expenditure on research and development, improve the benefits to the wider economy from business development assistance, and harness the potential of the digital economy.

MBIE's funding and support programmes aim to build a high-performing science and innovation system that will transform New Zealand into a more diverse, technologically advanced, smart nation.

For more information on how we invest, see our [website](#).



# CURIOUS MINDS

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MINISTRY OF BUSINESS,  
INNOVATION & EMPLOYMENT  
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