MTI Tech Board Review Process & System Instructions

PROCESS:

When a funding application is submitted, a request is sent out via email to the appropriate Tech Board sector members. Those who have the time, expertise, and are not conflicted will reply to the email stating that they are willing do the review. Reviews are done online via our grant management software, Blackbaud Grant Making. As a reviewer you will be able to set up your account and give feedback on a funding request.

If you agree to do a review, you will receive an email invitation from our software system letting you know that the application is available for your review. The email will come from mail@grantapplication.com Please add this to your 'safe senders' list so the emails don't go to your junk folder.

Please be aware that the software is not compatible with Chrome or Edge browsers.

You will need to use one of the browsers listed below.

> Internet Explorer (IE 11)
> Mozilla Firefox (v 45 or later)
> Safari for Mac

Each reviewer will have access to invited requests and their respective application documents. Additional documents in the Reviewer Portal may include an outside financial review from FAME, technical reviews from AAAS and the Investment Summary from MTI staff.

Each question of the review requires you to enter a number value (1 to 4) in the box of the review form.

SYSTEM INSTRUCTIONS:

Blackbaud Grantmaking Reviewer Portal

Blackbaud Grantmaking is the grant management tracking system used by MTI. The Reviewer Portal is part of this system. As a Reviewer, you will be able to log in with your personalized account to give your feedback on a funding request.

You will receive a welcome email similar to the one below. Click on the URL in the email or cut/paste into your browser to launch webpage.

From: MTI Online Reviews <mail@grantapplication.com>
Sent: Wednesday, February 26, 2020 4:35 PM
To: Barb Ford <bford@mainetechnology.org>
Subject: MTI review request

Dear Review Committee Member,

Your input has been requested on proposal 20190051 from The Thing, Inc. This review would be due by 2/26/2020.

Please log in to ReviewerCONNECT (https://mti.goreviewers.com/#/app/dashboard) to view the details of this request. Passwords expire every 90 days; you may need to reset your password if it has been more than 90 days since you last accessed the Reviewer portal.
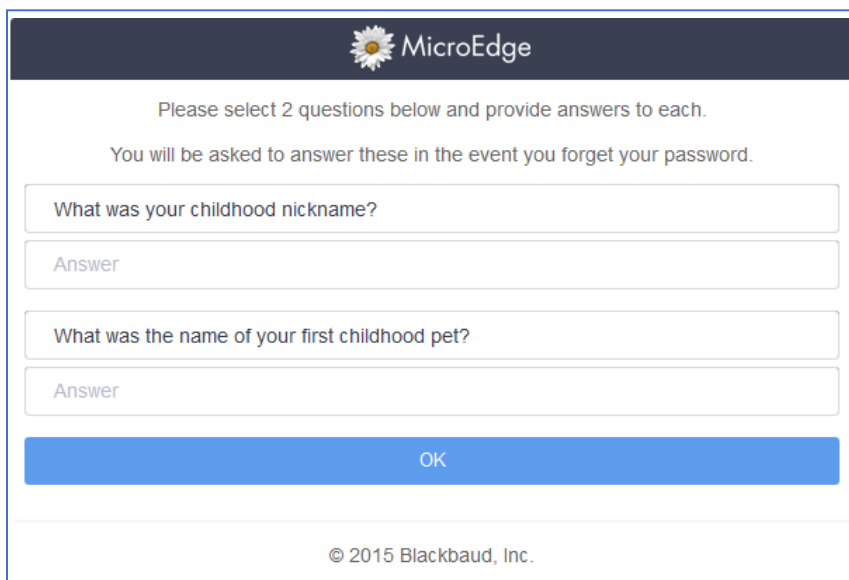
If you can review, please accept the review in the portal. If you are unable to review, please decline the review in the portal and select a reason from the drop-down menu at that time.

Thank you for offering your time and expertise to MTI and our clients!

Best,
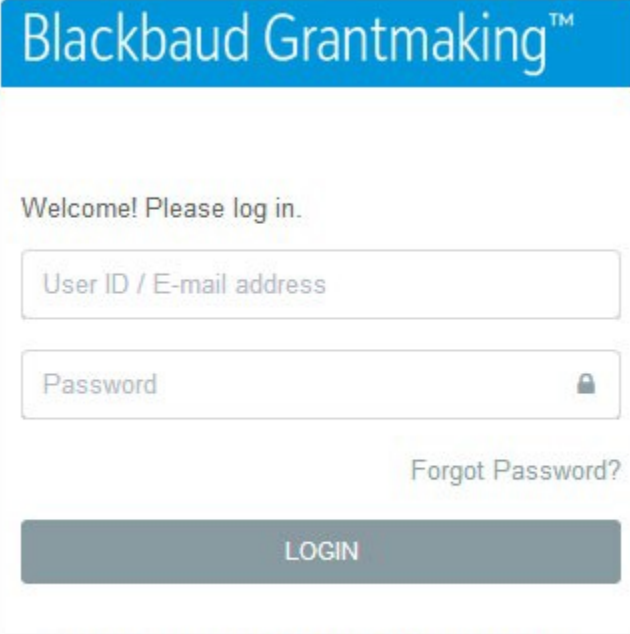
Lou Simms
Investment Officer
lsimms@mainetechnology.org

The first time you access the portal, you'll be asked to create a password and then you will log in with the new password. You may be asked to set up your security questions – select the question to see a list of questions to choose from:

If you have already used the portal, you'll access this with your email and password. You have three tries to access the system before you are locked out. Lockout is reset after 24 hours.

If you have forgotten your password, select the "Forgot Password?" link and a temporary password will be sent to your email.

The Review Portal launches:

Primary Navigation Buttons

The primary navigation buttons display information on Reviews and Announcements.

You can change your email or password from this screen and see any announcements that we have for you.

Left-hand Column
The left-hand column displays information about your Active Reviews:

Active		3
Invited		1
In Progress		2
Submitted		1
Pinned		0

Center – Filter, View, Sort and Display Options
The options to filter, view, and sort have drop-down menus to choose the information that is displayed on the page.

Filter

Filter reviews...

Display (more options)

Change the display to a card view or table display by clicking on the icons.

Table Display:

Filter   Display (more options)

Filter reviews   Q.   ""ea█████ ╤-

	Due Date	Organization	Project	Requested	Recommended	Required?
☐ * ☐	8 / 3 0/2018	April Test1		0.00	0.00	No
☐ *		Fanny Farmer Calibration		25,000.00	0.00	No
* ☐	9/30/2018	April Test1		0.00		No

Card View:

Filter

Display (more options)

Filter reviews... 🔍

☐ ✉ **In Progress**

📁 ☑ ♟ ⤢

Due Date
9/30/2018

Organization
Fanny Farmer Calibration

Project
Baker'sThingamajigs Development & Scale Up

Requested
25,000.00

Recommended

☐ ✉ **Invited**

📁 👍 👎 ♟ ⤢

Due Date
8/30/2018

Organization
April Test1

Project

Requested
0.00

Recommended
0.00

☐ ✉ **In Progress**

📁 ☑ ♟ ⤢

Due Date
9/30/2018

Organization
April Test1

Project

Getting Started

From the Invited tab, you will begin by selecting the review. You can use the open folder icon 📂 :
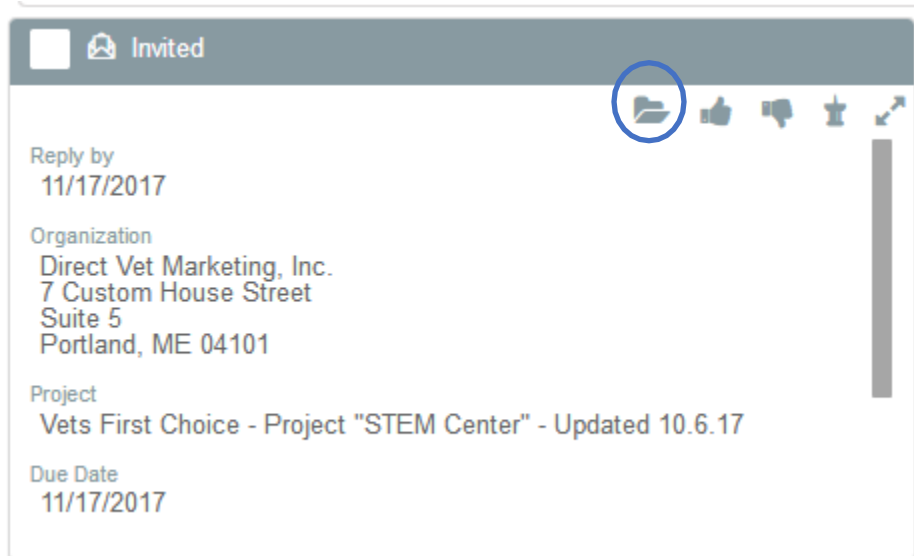
Or you can check the box and select 'Open' from the Actions menu on the right:

When you open the invitation, you must agree or decline the review to begin. After reviewing the basic information in the request section, select this from the RIGHT navigation bar:

No time? Not your area of expertise? Know the applicant? It happens, and we understand. If you decline to review, you will be asked why – just s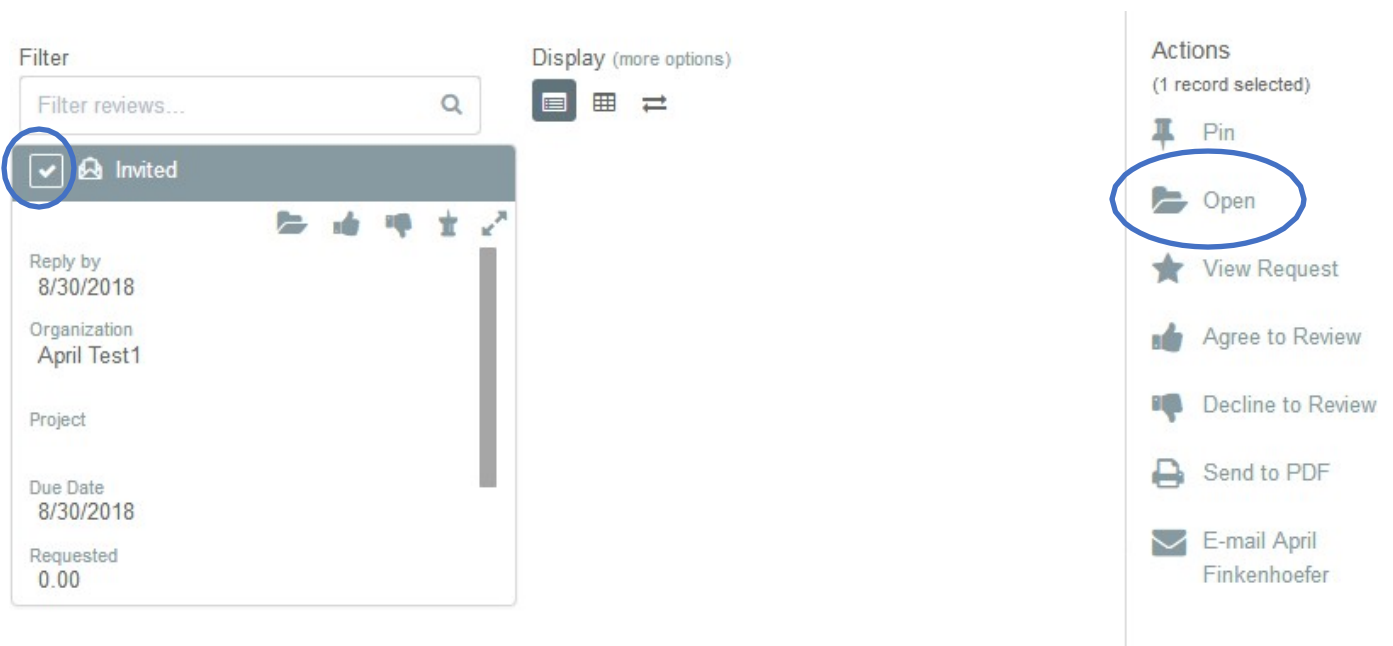elect from the options in the drop-down menu and feel free to put any notes you think will help us better select reviewers in the future. Click OK and the review is gone from your work area.

Decline to Review   ✕

* **Reason**   Reason   ▲

                       ⌕

                       Conflict of Interest

You will no longer   Outside area of expertise
to conduct it.
                       Not enough time: outside commitments

                       Not enough time: other MTI review requests

Notes

                                                              OK   Cancel

But if you can help us, you will click agree to review and you will be asked to confirm that you are accepting this review. Click OK and you can begin.

Confirm ✕

Are you sure you wish to review this
proposal? There is no undo for this action.
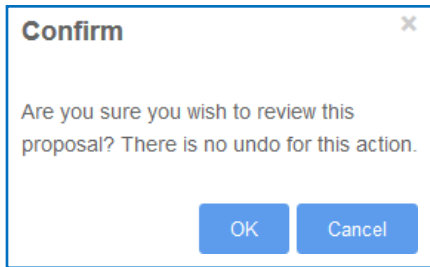
[OK] [Cancel]

If you are not ready to accept or decline to review at this time, click Cancel at the bottom of the page or on the Blackbaud Grantmaking logo at the top left to return to the main screen.

The Review is now available for your feedback. Each question's section has the applicant's response to the question (read-only), a comments field (optional) and a numeric score field (required) for your feedback (optional).

Feedback

Description of Team	agha;glh

Comments on Team

Does the core team have the qualifications to solve the problem/conduct the work? Plan to fill gaps in ability? What key challenges have team members faced? Do they have the ability to prototype or pilot?

✸ **Team Score**

Enter 1 (Red), 2 (Orange), 3 (Yellow) or 4 (Green).

The review sheet will add these (shown at the bottom):

Total Score	17

Some of the questions in the Feedback section will refer to documents the applicants submitted with their application. These are found in the Documents section, below Related in the left navigation area:

When you click Documents, a list of items attached to the application are provided. Find the file you need from the list and click on the download icon (arrow into a box):

Documents

Application1.html
Last updated on Sep 13, 2018
HTML version of Application
HTML version of Application [806]

Gantt Chart or Visual Roadmap
Last updated on Sep 13, 2018
April Test1 (Request [26066])
Attachment submitted with Application [807]

Scope of Work
Last updated on Sep 13, 2018
April Test1 (Request [26066])
Attachment submitted with Application [807]

Once you have completed your review, you can choose to:

Save & Close	Save	Cancel

- Save & Close – this option will save your changes and return to the home page
- Save – this option saves changes but keeps the record open
- Cancel – discards unsaved changes and returns to the home page

If you are done with this review and ready to submit your responses – select the submit button in the right navigation area. **NOTE:** *The review is only viewable by you until you select* **submit**.

Actions

⭐ View Request

☁ Upload Document

☑ Submit

🖨 Send to PDF

✉ E-mail April
Finkenhoefer

The confirmation pop-up appears, select OK to acknowledge:

Confirm ✕

Are you certain that you wish to submit your
feedback at this time? Please note that once
submitted, you will not be able to make further
changes to your feedback.

[Yes] [No]

Select "Yes" and your review is complete. Thank you for assisting with our review process!