Strategic Science Investment Fund:
New Zealand Data Science Platform

Assessment Guidelines

For Concept Platform Plans: 2018

MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

newzealand.govt.nz

Contents

Data science is dynamic and emerging, bridging multiple disciplines. We define data science as:

scientific methods, processes, algorithms and systems to extract knowledge and insights from data in various forms, both structured and unstructured, employing techniques and theories drawn from computer science, mathematics, statistics, information science, operations research and engineering.

Foreword

Thank you for agreeing to assess Concept Platform Plans submitted for strategic science investment funding to establish and host the New Zealand Data Science Platform.

The New Zealand Data Science Platform investment involves a two-stage application process. For the first stage, applicants submit a Concept Platform Plan. Informed assessment of Concept Platform Plans is a critical aspect of MBIE's investment process, as it forms the basis of MBIE's recommendations on whether to progress an applicant to stage two and invite them to submit a Full Proposal.

These guidelines detail what is involved in the assessment of Concept Platform Plans and the role that you will play in that process.

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

▬ 2 Introduction

As an assessor, you are critical in helping MBIE identify the Concept Platform Plans that have the greatest potential to establish and host a New Zealand Data Science Platform. Your assessment will help to inform decisions on whether to progress an applicant to stage two of the Data Science Platform investment process and invite them to submit a Full Proposal.

These guidelines detail the assessment process and the key roles and responsibilities for Concept Platform Plans only. If required, guidance on the assessment of Full Proposals will be provided separately.

We recommend that you read this document in conjunction with the New Zealand Data Science Platform Call for Proposals: Concept Platform Plans 2018 and other relevant information on MBIE's Data Science Platform webpage.

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

Email Assessment queries: SSIF.investment@mbie.govt.nz
Portal 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 Data Science Platform Concept Platform Plans.

Assessor

Your role as an assessor is to assess the Data Science Platform Concept Platform Plans. 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 Concept Platform Plans, 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, Concept Platform Plans 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 investment decisions.

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 Concept Platform Plans 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 Concept Platform Plans to inform funding recommendations and to enable appropriate feedback to applicants.
> Provide an assessment report to MBIE.

Confidentiality and Privacy

To ensure confidentiality, as an assessor you must:

> Ensure the safekeeping of all Concept Platform Plans 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 Concept Platform Plans with the applicant or any other party. If an applicant contacts you about a Concept:
   – direct them to us (SSIF.investment@mbie.govt.nz), and
   – email us with the details of your contact.
> Not use any confidential information for any purpose other than assessment.

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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 Concept Platform Plans.

OFFICIAL INFORMATION ACT 1982

Concept Platform Plans 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 Concept Platform Plans are fairly and reasonably appraised.

Before starting to assess, you must check your list of assigned Concept Platform Plans 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 different levels:

> A **direct** conflict of interest; where an assessor is:
  – directly involved with a Concept Platform Plan *(as a participant, manager, mentor, or partner)* or has a close personal relationship with the applicant, for example, family members, or
  – a collaborator or in some other way involved with an applicant's Concept Platform Plan.

> An **indirect** conflict of interest; where an assessor:
  – is employed by an organisation involved in a Concept Platform Plan but is not part of the applicant's Concept Platform Plan.
  – has a personal and/or professional relationship with one of the applicants, e.g., an acquaintance.
  – is assessing a Concept Platform Plan under discussion that may compete with their business interests.

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

Reporting Identified Conflicts

All conflicts of interest must be declared to MBIE.

If you identify a direct conflict with a Concept Platform Plan that has been assigned to you, you must decline the assignment. If you identify an indirect conflict, email MBIE at SSIF.investment@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 Concept Platform Plan 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 Concept Platform Plan.

Should the Chair declare a conflict of interest with a Concept Platform Plan, a Deputy Chair will be appointed for the ensuring assessment discussion.

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

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The Assessment Process

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

Key Dates

Assessor briefing	28 November 2018
Concept Platform Plans assigned	30 November 2018
Assessment recorded in the IMS portal	12 noon, 7 December 2018
Assessment Panel meeting	12 - 14 December 2018
MBIE decisions on Concept Platform Plans announced Invitation to submit a Full Proposal	February 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
1 day per Concept Platform Plan	Read your assigned Concept Platform Plans, assign scores and enter those scores with comment in the IMS portal.
3 days	Attend the Assessment Panel meeting (either in person or via video conference as agreed by MBIE) in Wellington New Zealand.

Assessor Briefing

Prior to performing assessments, assessors are required to attend a one hour briefing session via teleconference. The purpose of this session is to familiarise assessors with the:

> Assessment tools and resources that are available

> Content of the New Zealand Data Science Platform Call for Proposals Concept Platform Plans: 2018 including the structure of the application form, the assessment criteria, and the scoring guide.

Information about this briefing will be sent to attendees separately.

Allocation of Concept Platform Plans to Assessors

Concept Platform Plans that meet the eligibility criteria are assigned to assessors in the absence of any potential conflict of interest.

From **30 November**, MBIE will confirm your role and inform you of your assigned Concept Platform Plans 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 Concept Platform Plans.

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, 7 December 2018**.

Assessment Panel Meeting

The Assessment Panel meets in Wellington (either in person or via video conference as agreed by MBIE) on **12 - 14 December 2018** to discuss the preliminary assessment scores and supporting comments. Applicants may be invited to make a presentation to the Panel on their Concept Platform Plan.

The Panel's discussion and moderation may take into account any additional information gathered during the assessment process.

MBIE records the discussion, the consensus scores and the Panel's assessment.

Shortlist Recommendations and Decisions

The Assessment Panel Chair will provide MBIE with a report recommending which applicant should progress to stage two of the Data Science Platform investment process. The final decision on the shortlisted applicant will be made by the Deputy Chief Executive (DCE), of the Labour, Science and Enterprise Group, MBIE.

Results are publicly announced in **February 2019**. MBIE will provide general feedback based on the Assessment Panel's comments about the overall quality of all Concept Platform Plans to both successful and unsuccessful applicants.

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Performing Assessments

Use the following procedure to assess Data Science Platform Concept Platform Plans. If required, guidance on the assessment of Full Proposals will be provided separately.

The Assessment Steps

1. **Read and understand the assessment criteria, the Government's investment goals for the Platform and the Platform's focus.**

   Read and understand the assessment criteria detailed in these guidelines. This includes the scoring guide, the Government's investment goals for the Platform, and Platform's focus *(see over)*. The scoring guide and the points to note for each assessment criteria provide a common interpretation to clarify and help ensure consistency.

   We recommend that you also read the New Zealand Data Science Platform Call for Proposals: Concept Platform Plans 2018 available on MBIE's Data Science Platform webpage.

2. **Accept (or decline) assigned Concept Platform Plans.**

   Accept your assigned Concept Platform Plans or decline if you deem a conflict of interest exists *(see page 13 for details)*.

3. **Read assigned Concept Platform Plans** *(see page 14 for details)*.

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

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

   Independently score each Concept Platform Plan 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 Concept Platform Plan would deliver on the Government's investment goals for the Platform and Vision Mātauranga.

   Note that independent advice will be sought on Vision Mātauranga.

   While sections of Concept Platform Plans may align with the assessment criteria, evaluate the plan **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.

   Assessors are not required to apply the assessment criteria weightings to scores as this will be done by MBIE during the panel meeting.

   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.
   – word limits for comments apply; these clearly display top left of each **Comment** field in the IMS portal.

   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.

5. **Destroy (or return to MBIE) all Concept Platform Plans and supporting documentation** when the assessment process is complete.

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The Government's Investment Goals for the Platform

The goals for the investment in the Platform are to:

1. **Deliver excellence**: Produce excellent, cutting edge, dynamic and paradigm-shifting data science research.

2. **Grow capability**: Grow the scale, depth, excellence and impact of New Zealand's data science research community, with world-class academic leadership driving deep excellence in defined areas of data science. The Platform should build on existing expertise and attract top researchers, both senior and emerging.

3. **Leverage collaboration**: Foster and grow international and national connections between researchers and across institutions.

4. **Enable New Zealand researchers** to access innovative and advanced data science methods to tackle research questions and real world problems. The Platform will develop data science approaches, methods, tools and technologies that can be accessed by New Zealand researchers.

5. **Deliver additionality**: Provide fresh thinking, new people, new and expanded research, new collaborations and impacts that would not have happened without this investment.

6. Give effect to the **Vision Mātauranga** policy.

The Focus of the Platform

We expect the Platform to focus on addressing profound and complex data science challenges to expand the data science body of knowledge.

The Platform will focus on 3-4 technology themes inspired by 3-4 real world domains/use cases where advanced stretchy data science can help solve key challenges for New Zealand.

Possible technology themes include machine learning, statistical learning, data mining, image processing, language processing, visualisation, transparency and metrics, and Te Ao Māori and data science.

Possible areas of domain focus include urban systems, energy technologies, space technologies, biomedicine, future transport (including autonomous vehicles), health outcomes, and agritech. Cross cutting domains should be considered.

The Platform will have appropriate systems and tools to enable access and analysis of data.

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DATA SCIENCE CONCEPT PLATFORM PLANS

ASSESSMENT CRITERIA		SCORING GUIDE						
		Score & Keywords						
EXCELLENCE	Weighting	**1** (Low quality) *Missing* *Irrelevant* *No potential* *No credibility*	**2** *Minimal* *Low relevance* *Little potential* *Little credibility*	**3** *Some* *Partially relevant* *Some potential* *Some credibility*	**4** *Most* *Generally relevant* *General potential* *Generally credible*	**5** *Substantial* *Relevant* *Good potential* *Credible*	**6** *Comprehensive* *Very relevant* *Very good potential* *Very credible*	**7** (High quality) *Complete* *Highly relevant* *Excellent potential* *Highly credible*
The Platform will deliver excellence by developing cutting edge, dynamic and paradigm-shifting data science research for New Zealand. When assessing this criterion, assessors will consider the Concept's: > alignment with the focus of the Platform in the selection of the data science issue(s) or problem(s) to be addressed and how the method and high level approach (methodology) will enable the delivery of the research aims, > ability to develop deep excellence and world-class academic leadership in defined areas of data science, and > potential to develop new knowledge, approaches and/or scientific or technological advances that will be enabled by the proposed research.	25%	Content is missing, irrelevant or has no potential to deliver a high quality advanced Data Science Research Platform.	Many aspects are missing, have low relevance, or have little potential. For example, the research plan has no potential, and the strategic priorities have low relevance.	Many aspects are adequately met, but with some gaps or deficiencies. For example, the research plan shows some potential, but the strategic priorities have low relevance.	All aspects are met to a generally adequate level.	All aspects are adequately met; with some strongly met. For example, the research plan is relevant and the strategic research priorities are very credible.	All aspects are strongly met; with some met at an excellent level. For example, the research priorities are very relevant, and the research plan is highly credible.	All aspects are met in a highly innovative, relevant, credible and exemplary manner in terms of delivering world-leading data science research.
The Platform will build a high-performing collaboration to deliver excellent research and grow domestic and international science connections. When assessing this criterion, assessors will consider the Concept's potential to: > foster and grow international and national connections between researchers and across institutions, > build and maintain a skilled team with the relevant cross-institutional connection and resources needed to deliver the proposed research, and > enable research partners to access innovative and advanced data science methods to tackle research questions and real world problems.	25%	Content is missing, irrelevant or has no potential to build a high performing, well-connected team.	Many aspects are missing, have low relevance, or have little potential. For example, there are no provisions for facilitating access, and science connections have low relevance to data science capability.	Most aspects are adequately met, but with some gaps or deficiencies. For example, the proposed team and research accessibility show some potential, but science connections have little credibility.	All aspects are met to a generally adequate level.	All aspects are adequately met; with some strongly met. For example, the team shows good potential and access facilitation to end users is comprehensive.	All aspects are strongly met; with some met at an excellent level. For example, the team has a comprehensive mix of skills, and the proposed science connections show excellent potential.	All aspects are met in a highly innovative, relevant, credible and exemplary manner in terms of the quality of the team and its research partnerships and connections.

DATA SCIENCE CONCEPT PLATFORM PLANS

ASSESSMENT CRITERIA		SCORING GUIDE						
		Score & Keywords						
IMPACT	Weighting	**1** (Low quality) *Missing* *Irrelevant* *No potential* *No credibility*	**2** *Minimal* *Low relevance* *Little potential* *Little credibility*	**3** *Some* *Partially relevant* *Some potential* *Some credibility*	**4** *Most* *Generally relevant* *General potential* *Generally credible*	**5** *Substantial* *Relevant* *Good potential* *Credible*	**6** *Comprehensive* *Very relevant* *Very good* *potential* *Very credible*	**7** (High quality) *Complete* *Highly relevant* *Excellent potential* *Highly credible*
The Platform will create direct and indirect benefits for New Zealand by generating value for data science research end-users, including data science-based industries. When assessing this criterion, assessors will consider the Concept's potential to: > develop data science approaches, methods, tools and technologies that can be accessed by New Zealand researchers, > build the capability (scale and depth), excellence and impact of New Zealand's data science research community, > deliver additionality, provide fresh thinking, new people, new and expanded research, new collaborations and impacts that would not have happened without this investment, and > [1]support the Vision Mātauranga policy and support unlocking the science and innovation potential of Māori knowledge, resources, and people for the benefit of New Zealand.	25%	Content is missing, irrelevant or lacks potential or credibility to create benefits for New Zealand.	Many aspects are missing, have low relevance, or have little potential. For example, the scale of benefits lacks credibility, and minimal opportunities for leveraging value have been identified.	Most aspects are adequately met, but with some gaps or deficiencies. For example, the scale of benefits has some credibility but leveraging opportunities is minimal.	All aspects are met to a generally adequate level.	All aspects are adequately met; with some strongly met. For example, the scale of benefits is credible, with comprehensive leveraging of partnerships.	All aspects are strongly met; with some met at an excellent level. For example, the proposed scale of benefits is very credible, with excellent potential for leveraging via partnerships.	All aspects are met in a highly innovative, relevant, credible and exemplary manner in terms of the scale and likelihood of potential benefits to New Zealand.

The Platform will successfully deliver the expected benefits of the investment.
 	
 When assessing this criterion, assessors will consider the credibility of the:
 > Platform to deliver research, science or technology or related activities of the scale and type needed,
 > Platform to embody or give effect to the Government's investment goals,
 > Platform to develop effective pathways to impact for data science end-users and their sectors,
 > [1]Platform to increase capability, capacity, skills and networks that will benefit the research, science, and technology sector, and achieve the objectives and outcomes of the Vision Mātauranga policy, and
 > Concept to establish and maintain the proposed Platform, including:
   – credibility, capability and sustainability of the host organisation,
   – effectiveness of its governance and management arrangements,
   – the host's track record for successfully establishing and leading collaborative, agile and high-performing research platforms,
   – credibility of the underpinning partnerships, and
   – potential to capitalise on new opportunities and effectively manage risks.
	25%	Content is missing, irrelevant or lacks credibility or potential in terms of delivering benefits via end-users.	Many aspects are missing, have low relevance, or have little potential.
			
			 For example, material on governance or management is missing, and the pathway for delivering benefits has little potential.
				Most aspects are adequately met, but with some gaps or deficiencies.
				
				 For example, the pathway for delivering benefits has some credibility but the proposed organisational arrangements show little potential for effective governance or management.
					All aspects are met to a generally adequate level.	All aspects are adequately met; with some strongly met.
						
						 For example, the proposed governance and management structures show good potential, and the pathway to impact is very credible.
							All aspects are strongly met; with some met at an excellent level.
							
							 For example, the pathway to impact shows very good potential, and the means of maximising opportunities and effectively managing risks is highly credible.
								All aspects are met in a highly innovative, relevant, credible and exemplary manner in terms of delivering expected benefits via end users.

[1]A Vision Mātauranga expert will review all Concept Platform Plans and provide advice to assessors and to MBIE on these criteria.

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Viewing Assigned Concept Platform Plans and Recording Assessments

This section details how to access the Concept Platform Plans 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 all IMS portal queries, e-mail or call:
>
> **Email**   imssupport@mbie.govt.nz
> **Phone**   0800 693 778
>   (Monday to Friday, 8:30am to 4:30pm)

■ **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. Click the **portal** link in this email. The IMS portal's access agreement displays. This agreement details the terms and conditions governing the use of the portal.

   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 portal's **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.
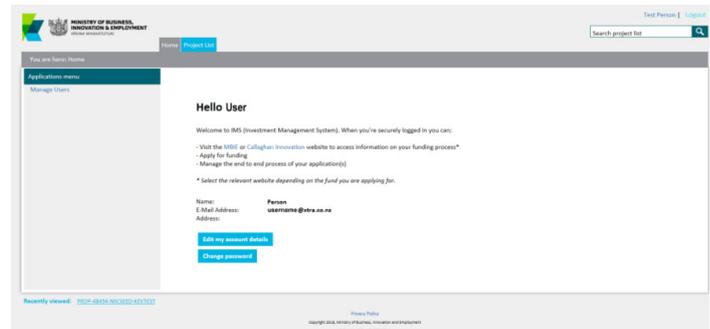
The **Home** page of the MBIE IMS portal

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 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 Concept Platform Plans

Concept Platform Plans will be assigned to you for preliminary assessment on or by **30 November 2018**. Additional plans 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 Concept Platform Plans assigned to you displays.

3. Scroll down the list to see your assignments.

   The Concept Platform Plans 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 **New Zealand Data Science Platform**.

4. For the first Concept Platform Plan listed, click the link under **View Project**. A summary of the Concept opens in a new browser tab.

5. After reading the Concept's 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 Concept.

     3. In the resulting dialog, enter the reason and click the **Save** button.
        The declined Concept is automatically removed from your assigned list.

     4. Close the summary.

   ▪ You deem an **indirect conflict of interest** exists, close the Concept's summary and email us at SSIF.investment@mbie.govt.nz to discuss further.

   ▪ There is **no conflict of interest**, close the summary and click the **Accept** button adjacent to the Concept.

   The Concept is allocated an **In progress** status.

6. Repeat the above steps for all the Concept Platform Plans in your list.

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Viewing and Printing Assigned Concept Platform Plans

■ **To view and print a Concept Platform Plan:**

1. Access the **Home** tab > **Investment Assessment** page > **Current** tab.

2. Click a Concept Platform Plan's **View Project** link. The full Concept *(in PDF form)* displays in a separate browser tab.

3. From here you can view, print and if required download the Concept to enable access without having to be logged into the portal.

   The Concept Platform Plan's identification number is prominently displayed in the header of the Concept. Concepts must be kept confidential. You **must**:
   - ensure the safe keeping of all Concepts and related documents *(e.g., workbooks and notes, etc.)* during the assessment process.
   - destroy all saved/printed Concepts *(or return to MBIE)* after the assessment process is completed.

Recording Assessments

Your assessments are due on or before **12 noon, 7 December 2018**.

■ **To record your assessments:**

1. Access the **Home** tab > **Investment Assessment** page > **Current** tab.

2. Click a Concept Platform Plan's **View Assessment** link. A **Scoring** page opens in a separate browser tab.

You can view and print the Concept Platform Plan by clicking the printer icon next to the Concept's number at the top left of the **Navigation** panel.
You **must**:
   - ensure the safe keeping of all Concepts and related documents, e.g., workbooks, notes, etc.
   - destroy all saved/printed Concepts 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.
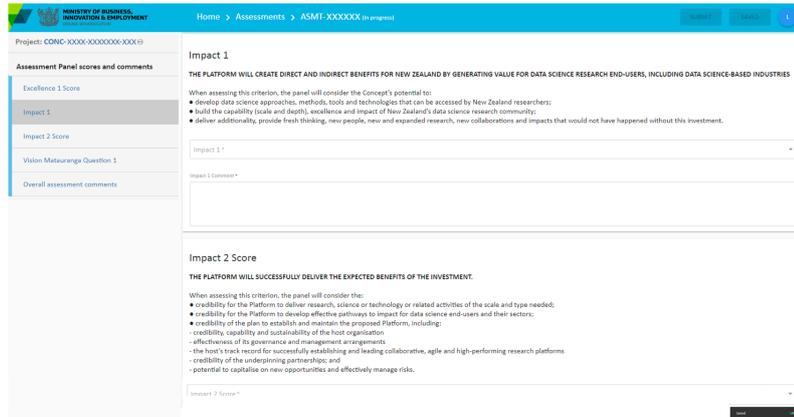
Your entries are automatically saved at regular intervals. A **Save and Undo** panel displays *(bottom right of the screen)* every time an automatic save occurs at which time you are given the opportunity to **Undo** the changes if necessary.

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.
–   word limits for comments apply; these clearly display top left of each **Comment** field.
Respond only to what you have been asked to assess.

4. When your assessment is complete (you have recorded your assessment rating and comment(s) into all of the fields), click the **Submit** button.

5. A summary dialog displays with your assessment. If your recorded answers are satisfactory to you, click 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 Concept Platform Plan is automatically assigned the status **Submitted**.

6. Close the browser tab displaying the **Scoring** page and return to the tab displaying your list of assignments.
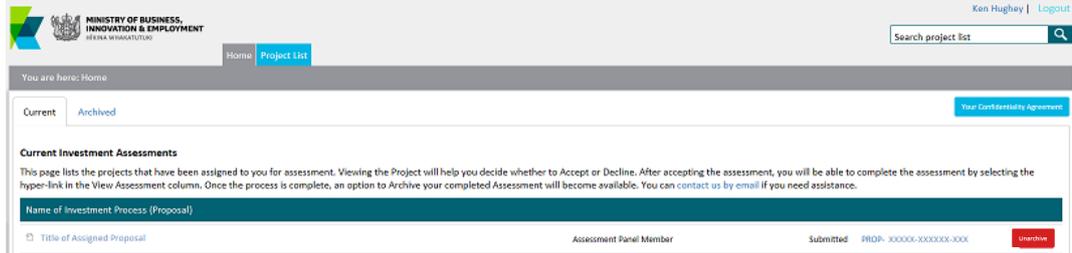
You may need to refresh the browser page to display the change in status.

7. For the Concept Platform Plan you have just scored, click the **Archive** button. The Concept is automatically removed from your list of assignments.
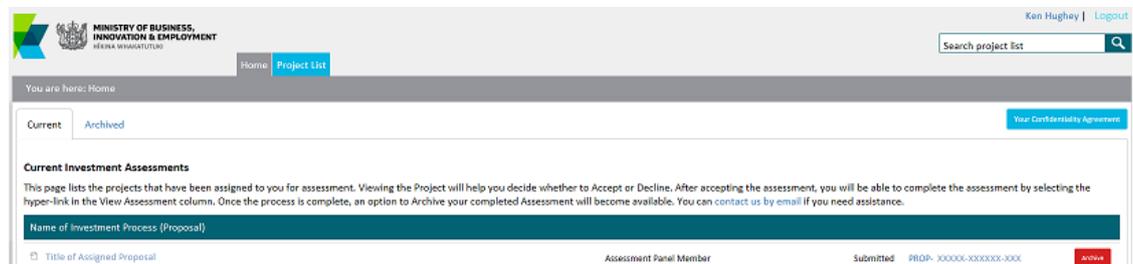
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View all archived assignments on the **Archived** tab. You can retrieve the Concept Platform Plan at any stage by clicking the **Unarchive** button.

Remember to destroy all saved/printed Concept Platform Plans after the assessment process is completed.

Checking the Status of your Assessments

You can check the completeness of your assessment of a Concept Platform Plan 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.

■ **To view and/or update your details:**

1. Click the **Edit my account details** 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 the **UN** 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 MBIE's Science and Innovation webpages.