



Grant Reviewer Selection and Engagement Guidance

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This guidance is a compilation of internal processes, practices, and resources from thirteen grant making agencies, shared with the Office of Grants Management in the Spring of 2025.

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Purpose

This document provides guidance to support executive branch agencies, boards, and commissions with the recruitment of grant reviewers and formation of grant review panels in a competitive grant process. It is organized around the stages of grant reviewer engagement, from planning and grant reviewer recruitment through evaluation of the process.

Introduction

This guidance to state agencies is to help standardize grant reviewer selection processes. Grant reviewers play a role in determining which grant proposals receive funding by evaluating grant proposals against pre-established criteria. This guidance is intended to assist agencies in developing and implementing their own procedures for forming grant review panels, including characteristics of review panels and grant reviewers, logistical considerations, and process documentation.

This document provides guidance on these topics while recognizing the decentralized nature of grant making in the State of Minnesota. The unique requirements of each grant program and agency structure must be considered when reviewing this guidance. Agencies that choose to use grant review panels should document how they identify potential members and select the reviewers.

Grant Policies Relevant to Grant Reviewer Selection Processes

Three Office of Grants Management (OGM) enterprise grant management [policies](#) establish important requirements for grant proposal review.

- [OGM Policy 08-01: Grants Conflict of Interest](#) requires state agencies to work deliberately to avoid conflicts of interest in grant-making at an individual and organizational level, provides definitions of actual and potential conflicts of interest, and highlights transparency as a guiding principle. The policy also references [MMB Policy HR/LR 1445: Code of Ethical Conduct](#) that is applicable for executive branch employees.
- [OGM Policy 08-02: Rating Criteria for Competitive Grant Review](#) describes and provides examples of grant review criteria and sets an expectation for a standardized scoring system that is presented on a grant proposal scoring sheet used by all grant reviewers. The policy establishes an expectation for grant review panels to discuss each proposal and reviewers' scores to assist the state agency with decisions on final funding recommendations. Those award recommendations may be informed by additional factors such as geographic distribution, service to special populations, and the grant applicant's history as a state grantee.
- [OGM Policy 08-03: Writing and Publicizing Grants Notices and RFPs](#) establishes an expectation that state agencies recruit and include community-based grant reviewers, providing them with stipends whenever possible.

Phase 1: Grant Reviewer Pool Planning and Recruitment

Definitions:

- **Grant reviewer pool:** A group of people who are qualified to be grant reviewers and might be selected to be on the grant reviewer panel. A grant reviewer pool could potentially include state employees, content experts, community members, or people in other roles.
- **Grant reviewer panel:** The group of people selected from the grant reviewer pool or through other means who will be the grant reviewers for a specific set of grant proposals.

Considerations Related to the Grant Reviewer Pool

When building a grant review pool, consider the following questions:

- Is there an existing pool of required or potential grant reviewers?
- Are there laws, statutes, or rules that govern how grant reviewers must be selected?
- Does the agency need to recruit reviewers?
- How often is recruitment needed (e.g., each time an RFP is posted, annually, as needed)?

The granting agency should set aside time to plan for recruiting a grant reviewer pool. Grant reviewer pools may be established for a particular grant cycle or retained across multiple RFPs and grant cycles. The goal is to recruit a diverse pool of individuals based on their background, content knowledge, geographic location, and lived experience.

Steps for establishing a grant reviewer pool include:

- Agencies collaborating with their legislative and legal support teams to identify any laws, rules, or other funding requirements that impact how the agency or program should establish its grant reviewer pools. For example, there may be requirements that dictate grant review eligibility, or outline the minimum qualifications, expertise, geographic location, characteristics, or life experiences required of reviewers.
- Documenting the minimum and desired qualifications potential reviewers need to serve on grant reviewer panels, including consideration of any technical knowledge or certifications that may be relevant or required.
- Creating a recruitment plan which conveys the requirements for eligibility to participate and the expectations for time commitment.
- Conducting outreach to create a pool of potential reviewers.
- Documenting pool recruitment efforts.
- Ensuring documents used and meetings organized are accessible to people with disabilities and address accommodation needs.

Here are two different approaches to establishing a grant reviewer pool currently in use across the state enterprise:

- **Appointed advisory councils or boards:** Grant programs may have established advisory councils or boards that are legislatively directed to review grants and make award recommendations.
- **Open opportunities:** Programs may publicize grant reviewer opportunities via GovDelivery, industry listservs, or other communication methods such as a website, newsletters, and press releases. These listservs can include external partner networks, previous reviewers, and community members. Interested potential candidates review information about the requirements and complete an application for consideration to be included in a grant reviewer pool. The specific methods for application and selection vary by agency and grant program.

Agency Staff Involvement and Processes

Agencies should have clear internal processes established related to outreach, communication, recruitment, orientation, disclosing and managing conflict of interest, training, and managing the grant review process. It is important to consider which roles and responsibilities of agency personnel will be involved in grant reviewer selection and support and ensure this information is documented. Whenever possible, state employees directly involved with a grant program should not also serve as grant reviewers for that same grant program. Throughout the process of building the grant reviewer pool, agencies must take steps to avoid, minimize, or otherwise reduce the impacts of actual or potential conflicts of interest, including individual and organizational conflicts of interest as defined in [OGM Policy 08-01: Grants Conflict of Interest](#).

Questions to consider include:

- Who is managing the process of recruiting and supporting grant reviewers?
- What is their capacity?
- What other roles are involved?
- Is there a clear process outlined to support agency staff?
- How long will each phase take?

Grant Reviewer Characteristics

Before recruiting or selecting a grant reviewer pool for a particular funding cycle, agency staff should define the required and desired characteristics of potential grant reviewers. Depending on the grant program, these characteristics could be broad or defined in detail. Some agencies maintain a pool of interested and eligible reviewers across multiple funding cycles. The grant reviewer pool may include community grant reviewers, state employees, and/or advisory council members. The following list includes considerations that might be used for building a grant reviewer pool.

- **Geographic location:** Should reviewers be from a variety of locations across the state or from a specific area that is the focus of the grant program?
- **County and community size:** Does the review panel include reviewers from large and small counties and communities, including tribal and sovereign nations?

- **Expertise:** Do reviewers need a specific level of technical expertise or advanced understanding of the grant program goals, promising practices, and community needs to provide effective review of grant proposals?
- **Stakeholder representation:** It is beneficial to include grant reviewers that are close to the work or community as well as those with an outside perspective.

Number of Reviewers and Time Commitment

Prior to recruiting potential grant reviewers to the grant reviewer pool, the agency should consider the number of grant reviewers needed to accommodate the agency's upcoming competitive grant reviews. To the extent possible, agencies should try to estimate the number of grant proposals anticipated, the amount of time it would take to the grant reviewers to review the proposals and participate in other activities such as training, orientation, and evaluation. Then the agency should work to build a Grant Reviewer Pool to accommodate these numbers.

Many agencies prefer recruiting more reviewers than necessary to join the Grant Reviewer Pool to mitigate for conflicts of interest, scheduling conflicts, and other unexpected situations during the formation of Grant Review Panel. Most state agencies have each grant proposal reviewed by at least two reviewers to help mitigate risk, errors, and bias. On average, agencies plan for each reviewer to review 8-10 grant proposals over a 10–14-day period.

Questions to consider include:

- Is there an estimated number of grant proposals?
- How long will it take for each grant reviewer to review? See Table 1 for general estimates based on information provided by enterprise agencies.

Table 1. Estimated Grant Reviewer Time Commitment

Grant Reviewer Activity or Task	Estimated Hours to Complete
Training and orientation	1-2 hours
Grant proposal review	2 hours per proposal
Grant review panel meeting	2-3 hours per grant cycle/RFP
Process evaluation/feedback	30 minutes

Phase 2: Grant Reviewer Pool Application Process

Agencies may ask that eligible and interested individuals complete an application to become a grant reviewer. A grant reviewer application should contain information the agency will need from the applicant and information about the process for being selected as a grant reviewer pool member, including if a stipend will be offered.

Agencies should only ask for data that is needed and work with their data practices compliance official for decision-making on the grant reviewer application content and guidance on Tennessee warnings, as applicable.

All grant reviewers who apply or express interest should receive an acknowledgement and communication about the status of their application. Clear instructions about next steps, timeline, and any requirements should be communicated in writing.

Table 2. Considerations for Grant Reviewer Applications

Phase 2: Decision points	Questions to Consider
Grant Reviewer Application format	• Where will potential applicants find the grant reviewer application? • How will people complete and submit the application? • What technology will be used to manage grant reviewer applications?
Application process/timing	• How long will the grant reviewer application opportunity be open? • How will applicants receive information about the status of their application? • How and when will those not selected for this grant cycle be contacted? • Will those not selected be invited to remain in the reviewer pool?
Application content	• What information does the grant reviewer applicant need to provide? • Is any of the information they need to provide private data? • Are there details about the process that should be included in the application? • Is contact information provided for questions? • Are applicants required to be provided with a Tennessee Warning and/or given information about how their private information will be used and stored? Contact your agency's Data Practices Compliance Official and legal counsel for more information.
Accessibility	• Is the application available in alternative formats to accommodate individuals with disabilities? • Will the application be available in both digital and print formats?

Phase 3: Grant Reviewer Panel Selection

Grant reviewers may be selected from a pool of eligible reviewers or directly invited based on requirements in funding appropriations, charters, or legislation. Agencies should document the methods for selecting and communicating with grant reviewers.

Grant reviewers can participate in multiple cycles of grant proposal review, as time and opportunity allow. Some panels combine state agency staff reviewers and external community reviewers with similar expertise. Some agencies have found that a mix of new and returning reviewers can be beneficial for the grant review panel.

Table 3. Considerations for Selecting the Grant Review Panel

Phase 3: Decision points	Questions to Consider
Number of reviewers	• Is the pool of reviewers large and diverse enough to meet the program needs? • Is additional recruitment from within or outside the agency needed? • How many grant reviewers will be needed to participate in the specific grant review panel?
Representation	• Are there eligible reviewers that meet the specific criteria established by the grant program? • How will the team prioritize individual skills, lived experience, and expertise? • How will grant reviewers be selected to join the grant review panel?
Communication	• How and when will grant reviewers be contacted and invited to participate in a specific grant review panel? • Which agency staff person is responsible for communicating with potential and selected grant reviewers?
Data practices and records management	• What records of the process are required to be kept and for how long? • How will personal information of grant reviewers be handled? • How is the agency keeping any private information on individuals collected from grant reviewers secure?

Phase 4: Training and Orientation

Training can be planned concurrently with Phases 1-3. It will be helpful to potential grant reviewers to know the training obligations and timing as they consider participating as a grant reviewer. The intention behind training grant reviewers is to ensure they have the knowledge and skills needed to review and score grant proposals consistently and fairly.

During training, agency staff should inform grant reviewers that their names, comments, and any conflicts of interest they may have will be publicly disclosed at the end of the grant award process. Any comments documented by grant reviewers are considered public data.

Prior to reviewing grant proposals, grant reviewers should understand:

- The goal of the grant program.
- The roles of the reviewers and agency staff.
- The system and criteria for scoring proposals.
- Grant review timelines.
- Data practices.
- Conflict of interest.
- Expectations for submitting and discussing feedback on proposals.

If the selected reviewers are all experienced with reviewing the specific grant, agencies may choose to offer written instructions only. If reviewers are new to the process, additional technical assistance beyond written instructions, such as a live training, may be required. Some agencies include self-paced anti-bias training as part of grant reviewer orientation. Many agencies use online meetings including hybrid or fully online to connect with grant reviewers. When planning training events, agencies should consider the needs of grant reviewers including technology access, transportation, accessibility, childcare, and language translation.

Conflict of Interest

As referenced in Phase 1, agencies must take steps to avoid, minimize or otherwise reduce the impacts of actual or potential conflicts of interest, including individual and organizational conflicts of interest, throughout the process of working with grant reviewers.

Before receiving any grant application materials, reviewers should be given a list of all applicants to review and affirm that the reviewer does not have a conflict of interest with any of the grant applicants. This includes the categories of potential conflict of interest, actual conflict of interest, individual conflict of interest, or organizational conflicts of interest.

State Employees

Employees must avoid any action which might result in a conflict of interest, a potential conflict of interest, or the appearance of a conflict of interest. It is the employee's responsibility to recognize and understand this. An employee who becomes aware or is not sure if an actual, potential, or apparent conflict of interest exists must work with their supervisor, who then must confer with the agency human resource office or agency's ethics officer to make the appropriate determination. As a reminder, [MMB Policy HR/LR 1445: Code of Ethical Conduct](#) states that employees may be subject to discipline, up to and including discharge, for engaging in actual, potential, or appearance of a conflict of interest, and for failing to disclose actual, potential or apparent conflicts of interest.

- Would this employee's involvement in the development, review, or evaluation of grant proposals result in an actual, potential, or appearance of a conflict of interest?

All Potential Reviewers

Per OGM Policy 08-01: Grants Conflicts of Interest:

- All grant reviewers must complete and sign a conflict of interest disclosure form for each competitive grant review in which they participate.
- All grant reviewers must identify where actual or potential conflicts of interest exist. This includes individual conflicts of interest and organizational conflicts of interest.

Reviewers that have questions or disclose a conflict of interest should work with appropriate state agency staff to ensure that the conflict of interest is avoided, mitigated, or resolved before any reviewers are assigned grant proposals for review. Agency staff should only assign proposals to reviewers after receiving each of their Conflict of Interest (COI) forms and verifying that no actual, potential, or apparent conflict of interest have been disclosed or take steps to resolve or mitigate for circumstances when a conflict of interest is disclosed:

- A community reviewer will not be assigned proposals where they have an actual or potential conflict of interest, including an individual or organizational conflict of interest. If a community reviewer identifies an actual or potential conflict of interest, the agency must work to resolve or mitigate the conflict, depending upon the circumstance.

State employee will not be assigned proposals where they have identified an actual, potential, or appearance of a conflict of interest as referenced in [MMB Policy HR/LR 1445: Code of Ethical Conduct](#).

Considerations for Training and Orientation

The following table outlines considerations for the training and orientation phase.

Table 4. Considerations for Conducting Grant Reviewer Training and Orientation

Phase 4: Decision points	Questions to Consider
Scheduling training dates and times	• Will multiple dates and times be available? • What timing makes sense with other pre-award activities for the grant opportunity? • Do the training times support participation with work schedules and caretaking responsibilities?
Scheduling training location(s)	• Who will send the meeting invitation or reserve space? • Will the training be available online or in person or both? • If in person, does the space have the technology and furniture needed?
Training materials	• Is a handout or instruction manual needed? • Will there be a presentation? • Who will create and/or update these support materials? • Are there tip sheets or FAQs to support review and/or navigation of any grants management systems?
Paperwork/Administrative tasks	• What forms or steps do grant reviewers need to complete for stipends, conflict of interest, etc.?
Trainer	• Who is responsible for leading the training? • What do they need to be successful?
Accessibility	• Will the training materials need to be provided in multiple or specific languages? • Do the training materials meet the state's accessibility standards? • Will applicants need certain types of technology to view and complete the training?

Phase 5: Grant Reviewing and Scoring

The process for reviewing and scoring grant proposals should be established in compliance with OGM Policies [08-02: Rating Criteria for Competitive Grant Review](#) and [08-03: Writing and Publicizing Grant Notices and RFPs](#). Some additional tips related to reviewing and scoring include:

- The rubric used by grant reviewers should contain weighted criteria against which all proposals are considered as well as detailed instructions on how to use the rubric.
- Grant reviewers' scores and comments inform agency staff and leadership decisions in making awards. In some cases, grant reviewers and decision makers may be the same individuals. In other cases, grant award decisions take multiple factors including grant reviewer feedback into account.
- The agency should document comments and scores to maintain transparency of the process, while respecting individual grant reviewer confidentiality. Comments and scores can be saved and maintained separately and can be tied to a unique grant reviewer ID number that are assigned to individual grant reviewers.
- Reviewers should be reminded that they may not share any information they encounter during the review process that may violate [Minnesota Statutes, section 13.599](#). This statute relates to which and when information contained in a grant proposal is public versus not public.

There may be instances where all grant application materials can be provided to all grant reviewers. However, there are instances where this is not feasible, such as when there are too many proposals. In such situations, agency staff could choose to assign proposals based on reviewer expertise.

Table 5. Considerations for Grant Reviewing and Scoring

Phase 5: Decision points	Questions to Consider
Gather and distribute final list of potential grantees	• When will this list be available? Grant reviewers will need this list to determine if they have a conflict of interest. • Who will create a simplified list to share with grant reviewers?
Distribute and collect conflict of interest (COI) forms	• What guidance for considering conflict of interest is needed for grant reviewers? • When will the forms be due?
Conflict of Interest mitigation	• How will the agency mitigate, manage, and resolve conflict of interest? • How will this process or activities be documented? • Who will be involved?
Assign proposals for review	• How do conflict of interest responses impact assignments? • Who will make the assignments?
Timeline for review	• How much time is budgeted for review of proposals? • Is time set aside to answer grant reviewer questions as they arise?
Collect and finalize scores	• Are any scores missing or unclear?
Score and feedback synthesis	• How will scores and comments be shared? • Who will do this task?
Host review meeting	• What will the agenda be? • Who will facilitate?
Recommendations for awards	• How are recommendations presented? • To whom?

Phase 5: Decision points	Questions to Consider
	• What approvals are needed?

Phase 6: Stipends and Process Evaluation

Concluding the grant reviewer engagement involves processing stipends, if applicable, and evaluating the grant review process.

Table 6. Considerations for Processing Stipends and Evaluating the Grant Review Process

Phase 6: Decision points	Questions to Consider
Stipends	• Are stipends permitted by agency policy? • Who is involved in approving and issuing payments? • How must stipend payment details be tracked? • If stipends are based on hours, who is tracking and approving grant reviewer time? • Is there a specific timeline for completing payments? • Have we adequately informed grant reviewers about the potential for tax implications?
Process evaluation	• What would agency staff find helpful to learn more about from grant reviewers? • How will this feedback be gathered? • How will the information be used?

Resources

Visit the [OGM website](#) for templates and resources to support grant reviewer participation in the grant review process.