



# History Trust of South Australia Peer Assessor Handbook

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## Overview

This handbook provides an overview of the process of assessing History Trust of South Australia (HTSA) grants as a peer assessor. It outlines the roles and responsibilities of a peer assessor and the process by which the HTSA ensures decision making is fair and transparent.

The HTSA runs two grant funds that require peer assessors. These funds are the South Australian History Fund (SAHF) and the Museum and Collections (MaC) Project grant. To be a peer assessor for these funds, you should have sufficient knowledge of, or experience in the field of history, museums or collection management.

People with questions about the grant assessment process should contact the Community Engagement team [atcommunity@history.sa.gov.au](mailto:atcommunity@history.sa.gov.au)

## About History Trust of South Australia

The HTSA is a statutory authority, legislated under the History Trust of South Australia Act 1981. The responsibility of the HTSA is to encourage current and future generations of South Australians to discover that this state's past is rich, relevant and fascinating. The HTSA achieves this responsibility through managing the Migration Museum, Maritime Museum, National Motor Museum and Centre of Democracy in partnership with the State Library of South Australia. In addition, the HTSA supports South Australia's history network of committed volunteer associations and local history specialists and offer annual grants. Each year we present the South Australian History Festival and the Bay to Birdwood historic vehicle run.

### History Trust of South Australia Grants

Each year the HTSA offers two annual grant programs that progressively add to South Australia's history and bring it to life. The SAHF supports community and individual projects, publications and research, while the MaC fund supports groups who participate in the MaC Development and Funding Program.

The grant programs support HTSA in its goal to:

- Champion South Australia's history and make it accessible
- Tell our stories locally and globally
- Foster innovative research and engagement
- Invest in emerging and established historians
- Welcome and share diverse voices and stories

### South Australian History Fund

SAHF provides grant support to projects, research or publications that contribute to the knowledge, understanding and sharing of South Australia's rich history.

Each year the SAHF provides up to \$10,000 for individuals and \$20,000 for organisations.

## **What can be funded**

- Community focused projects that help to explore, interpret or preserve South Australian History, making it accessible to local and global audiences
- Publication of both academic and popular forms of historical writing and presentation – including digital and online platforms
- Research by established and emerging historians that makes a significant contribution to the body of knowledge about, or understanding of, South Australian history.

## **Museums and Collections Project Grants**

MaC project grants support the development, preservation and sharing of community-held historical collections, promote best practices, and raise the profile, impact and reach of South Australian history and community history organisations.

Each year the MaC project grant provides up to \$20,000 to members of the MaC Development and Funding Program.

## **What can be funded**

A wide range of projects that help organisations care for, document, present and share collections and local history can be funded.

Project possibilities include:

- Projects that make connections with your communities and/or invite people to view historical events from different perspectives
- Innovative digital or physical history projects and exhibitions
- Collections or community development projects and programs that engage new audiences and/or engage existing audiences in new ways
- Projects that make connections with schools including education resources and programs
- Physical and digital publication projects that make history and collections accessible to local and global audiences
- Collection documentation/cataloguing,
- Digitisation or reformatting
- Development of collection storage facilities, rehousing and conservation of significant collections
- Engagement of specialists to conduct collection care or management review, significance assessment, or to develop interpretation or design plans for physical or digital projects
- Collection research activities and oral histories
- Visitor research
- Specialist workshops/skills training for staff or volunteers
- Projects that promote community wellbeing and lifelong learning
- Projects that engage local First Nations communities in the telling of our shared history

- Partnerships with other organisations that further your historical activities and impact.

More information can be found about both the SAHF and MaC Project grants here: [Grants | History Trust of South Australia](#)

## Roles and Responsibilities of Peer Assessors

Peer assessors bring expertise and knowledge of South Australian history, interpretation and collections management to this arm's length decision making process. Ensuring that funds are offered to individuals and organisations against merit based and project feasibility assessment criteria in a transparent and unbiased manner. As budget limitations will prevent all worthy applications from being funded, the peer assessment process ensures a robust evaluation with only the most meritorious applications being recommended.

The role of the assessors is to:

- Work within the SmartyGrants management system to assess assigned applications within a designated timeframe
- Undertake this task independently of other assessors while maintaining confidentiality
- Complete ratings and comments on the designated assessment form to record how well each application fits assessment criteria. This can include providing hints or feedback to applicants about their projects or applications or suggest conditions for grants should they be selected.
- Attend an assessment panel meeting (may be held in-person or virtually) to talk through assessments and agree selections and any conditions.

Peer assessors will review and assess each grant application on:

- its merit
- how it compares to other applications
- whether the application represents value for money
- the feasibility of the project
- how it aligns with the goals of the grant fund

To ensure peer assessors can perform their duties, peer assessors must:

- Familiarise themselves with the grants program they are assessing, its guidelines and applications process
- Understand their obligations under the *Code of Ethics for the South Australian Public Sector*
- Provide independent, unbiased assessment of all eligible applications transparently and in a consistent manner by the agreed deadline.
- Participate in independent assessment review and assessment meetings.
- Declare any actual, perceived or potential conflict of interests with any grant application.

- Keep all application details, assessments and discussions confidential. Peer assessors cannot discuss applications with applicants and should refer applicants to the HTSA.

Peer assessors who are repeatedly unable to fulfill their duties or who breach the *Code of Ethics for the South Australian Public Sector* may be asked to vacate their position in the pool.

HTSA's role is to

- Undertake administration around the grant fund, including checking applicant eligibility, organising applications for assessment, preparing combined assessment ratings/comments for reference at the panel assessment meeting and reporting to the History Trust Board
- support assessors to navigate and undertake the assessment process. This may include background information that gives you context for assessments
- undertake any follow-up with applicants following the assessment process

## Peer Assessment Process

The SAHF and the MaC project grants are both assessed in the SmartyGrant Management system.

Applicants submit their proposal through the SmartyGrant Management system during the open dates for the grant. After the grant closes HTSA staff assess the eligibility of each application. Assessment of content is not done at this stage only the eligibility of the applicant against the published criteria.

Once eligibility checks have been completed, eligible applications are made available to the appointed panel of peer assessors. Assessors are given approximately 3 weeks to independently assess each eligible application. At the completion of the independent assessment round, assessors attend an assessment meeting facilitated by the Grants Administrator and Senior Curator – Community Engagement. In this meeting applications are discussed, and a final list of recommended applications are confirmed.

## Grant Fund Goals

### South Australian History Fund

All applications to SAHF are assessed against the following criteria:

- Audience reach and value of the project to identified audiences, including any confirmed project partners or communities where relevant.
- Ongoing outcomes from South Australian history that reflect the contribution of the project to the telling of South Australia's rich and diverse history, advancing historical knowledge and/or raising the profile of history in the community.
- A clear project plan, budget, viability and capacity to deliver desired outcomes.
- Use of appropriate historical methods, techniques, skills and services

Additional criteria are also used to assess grant applications in the three SAHF grant categories:

#### Community-focused projects

- Enable communities to explore, interpret or preserve aspects of their history.
- Make South Australian history accessible to local and global audiences.

#### Publication projects

- Include new audiences or engagement platforms, including online and digital channels

#### Research projects

- Contribute significantly to the body of knowledge about or understanding of South Australian history.
- Lead to publication or significant public dissemination, including online and digital channels.

### Museum and Collections Project Grants

All applications to MaC project grants are assessed against the following criteria:

- Contribute to the development of rich and diverse South Australian history experiences for identified audiences.
- Be significant and relevant to preservation, care, interpretation, accessibility of or engagement with South Australian history.
- Lead to outcomes that will have lasting impact and value for South Australian history.
- Demonstrate understanding, and intended application, of good practice standards in caring for collections or engaging audiences.
- Be well-planned and accurately costed including estimates and quotes for service providers or equipment.

## Peer Assessor Management and Fees

### Recruitment

Expressions of Interest's to be a peer assessor can be received at any time via SmartyGrants. A link to the SmartyGrants application can be found here: [Grants | History Trust of South Australia](#). Interested parties need to complete an Expression of Interest form and provide an abridged version of their curriculum vitae.

All applications to be a peer assessor are reviewed by HTSA staff. Recommendations for appointment to the Pool of Assessors are made to the Chief Executive Officer of HTSA who approves the final selection.

### Appointment

Appointment to the pool is for two years, with pool assessors given the opportunity to reapply as part of biennial recruitment to the pool. Each grant round requires three

assessors, and each assessor is limited to assessing one grant round per year. In the event that a grant round can't be filled with assessors who have not sat on a round in that calendar year, approval can be sort from the Chief Executive Officer to appoint a peer assessor who has already done panel duty in that year.

Peer assessors can apply for HTSA grants while appointed to the pool of assessors, however they must declare their intentions to the HTSA. Peers who are applying for a grant in a particular funding round will not be appointed as an assessor to the assessment panel of the grant they are applying for. Peer assessors must have acquitted any outstanding HTSA grants before being placed on an assessment panel. Peer assessment panels are established in advance of the opening of grant rounds. A panel member who is appointed to a panel who intends to apply for a grant has two weeks to inform the HTSA. This allows for a replacement panellist to be appointed in a timely fashion.

Peers can resign from the Pool during their two-year period by writing to the HTSA.

Successful peer assessors must sign a Peer Assessor Panel Agreement.

### Induction

Peer Assessors appointed to a panel for the first time or who have not served on a panel in the last two years are required to complete an Assessor orientation. The orientation will cover:

- Overview of the HTSA Grants Policy and guidelines
- Overview of *Code of Ethics for the South Australian Public Sector*
- The roles and obligations of peer assessors and the HTSA.
- Objectives and Criteria for HTSA funding
- Application assessment process including the use of SmartyGrants.
- Approaches to consistency in assessment
- Administrative processes regarding invoicing and payment

### Fee schedule

The fees payable by the HTSA to the assessor for their services are:

- \$55 (GST Exclusive) per hour (pro rata) to undertake the following:
  - Attend orientation session when first appointed to a panel, orientation's need to be renewed after two years.
  - Independently assess grant applications via the SmartyGrants system.
  - Attend the panel assessment meeting.

The Assessor may not charge any amount greater than 20 minutes to undertake an assessment of any grant unless otherwise expressly agreed with by the HTSA.

Information regarding how to report hours spent will be made available upon appointment to a Panel.

State and Federal Government employees are not eligible for payment



### Claiming fees

Assessment, induction and meeting fees are paid by the HTSA upon submission of a report on hours and an invoice by the assessor. First time assessors will need to complete a Vendor Creation form, which HTSA will supply. More details about this process will be provided upon appointment to a grant panel.