

30.20.40 Allocate Assessors

1.0 Process Summary

1.1 Process Owner

The Process Owner has overall responsibility for a process. They're accountable for the process operating efficiently and effectively.

Head of Pre Award

1.2 Process Champion

The Process Champions are responsible for ensuring the process documents are up-to-date, accurate and shared with Process Participants.



1.3 Purpose / Scope of the Process

Purpose/Scope of Process

The purpose of this process is to allocate Assessors to applications for assessment.

Process Start

The process is triggered when a competition closes, and all applications have been submitted.

Process End

The process ends when all the applications have been assigned to assessors for assessment.

1.4 Link to Process Model -



2.0 Standard Operating Procedure

Step No.	Main Operating Steps	Procedure and Guidance	Responsible	Consulted	IT-Systems	Documents (see section 3 for links)
1	Confirm all Ineligible Applications have been Removed	Procedure - Confirm from the Competition Manager that all the ineligible applications have been removed Guidance and Troubleshooting - This is important because ineligible applications are difficult to find if they are removed after assessors have been assigned.	Competition Delivery Executive	Competition Manager		
2	Create and Send Allocations Sheet to Innovation Lead	Procedure - Open a new Excel file from the Manual Allocations Matrix template. - Run a fresh IFS006 report of the relevant competition by- - Selecting 'No' to the question 'All Competitions Data?' - Selecting the relevant competition under 'CompID' option. - Selecting 'ACCEPTED' only under the 'Participant Status' option. - Export the report in an 'XLSX' format and open it. - Identify the competition ID and description from cell A3 of the report and enter them in cell A1 of the Allocations sheet of the template. - From the data table of the report, copy the list under the 'Invitee Name' column and transpose-paste it in cell F1 of the Allocations sheet. - Go to the 'Skills' sheet of the template and paste-values the same copied data in cell A2. - Select all the columns beginning from the first empty cell after the names list up to the last. Apply the 'Clear all' format. - Return to the IFS006 report and copy the data under the 'Skills Area' table heading. - Paste the data under the corresponding 'Skills Area' column, that is, in cell B2 of the Skills sheet of the template. - Run a fresh IFS002 report of the relevant competition. - Export the report in an 'XLSX' format and open it. - Copy the data under the following table headings of the report. -Project Number - Project Title - Lead	Competition Delivery Executive	Innovation Lead	Microsoft Excel	Assessor Allocation Spreadsheet

For information and support on Business Process Management and Documentation contact the Process Team.

Step No.	Main Operating Steps	Procedure and Guidance	Responsible	Consulted	IT-Systems	Documents (see section 3 for links)
		- Paste-values under the matching three column headings in row 4 of the Allocations sheet of the template. - Identify the first empty row after the pasted list. Select all the rows beginning from this row down to the last and apply the 'Clear all' format. - Close the report. - Save the completed Allocations Template file as 'XXXX Allocations Sheet', where XXXX is the competition ID or number Guidance and Troubleshooting - xxx				
3	Review Sector Specific Assessor Spreadsheet	Procedure - xxx Guidance and Troubleshooting - xxx	Innovation Lead			Assessor Allocation Spreadsheet
4	Manually Allocate Assessors to Applications	Procedure - xxx Guidance and Troubleshooting - xxx	Innovation Lead			Assessor Allocation Spreadsheet
5	Send Allocations Sheet to Competition Delivery Executive	Procedure - xxx Guidance and Troubleshooting - xxx	Innovation Lead	Competition Delivery Executive		Assessor Allocation Spreadsheet
6	Assign Applications to Assessor	Procedure Assign the applications to the Assessors in Innovation Funding Service (IFS), by referring to the assessor allocation spreadsheet	Competition Delivery Executive		Innovation Funding Service	Assessor Allocation Spreadsheet

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Step No.	Main Operating Steps	Procedure and Guidance	Responsible	Consulted	IT-Systems	Documents (see section 3 for links)
		Guidance and Troubleshooting • xxx				
7	Notify Assessors of Allocations	Procedure • Click on the Notify Assessors button on the home page for the competition. Guidance and Troubleshooting • Assessors should only be notified after the briefing slides and recording have been sent out. • The Notify Assessors icon should always be clicked on after any change has been made to allocations.	Competition Delivery Executive	Assessor	Innovation Funding Service	
8	Receive Notification of Allocation	Procedure • xxx Guidance and Troubleshooting • xxx	Assessor		Innovation Funding Service	
9	Review Assignment	Procedure • xxx Guidance and Troubleshooting • xxx	Assessor		Innovation Funding Service	
10	Accept Each Application to Assess?	If Yes, Go to Step 11 If No, Go to Step 12	Assessor			
11	Select Accept Assignment	Procedure • 5 Assessments per competition is required, at the costs of 120 GBP per assessment.	Assessor		Innovation Funding Service	

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Step No.	Main Operating Steps	Procedure and Guidance	Responsible	Consulted	IT-Systems	Documents (see section 3 for links)
		Guidance and Troubleshooting • xxx Process Ends				
12	Select Reject Assignment	Procedure • xxx Guidance and Troubleshooting • xxx Process Ends	Assessor		Innovation Funding Service	

3.0 Supporting Information

3.1 Related Training Materials

What training material is available to support this process

3.2 Related Policies / Guidance

What Policies and Guidance inform this process.

Assessors

Link to Policy/Guidance: Policy



3.3 Participants

Departments, Teams and Roles with the process.

Assessor

Competition Delivery Executive

Department: Business Operations Department

Team: Awards Team

Organisation: Innovate UK

Competition Manager

The Competition Managers in the Competitions Team within Pre-Award are responsible for the operational delivery of competitions through to the funding decision being made and communicated.

Department: Business Operations Department

Team: Competitions Team

Head of Pre Award

Innovation Lead

The Innovation Lead role is the business/technical lead, they have overall responsibility for a Competition or Project.

3.4 IT Systems

IT Systems and Applications used within the process.

Innovation Funding Service

IFS is Innovate UK's competition and applicant management application.

IT System Owner: IFS Product Manager

Microsoft Excel

Microsoft Excel is a spreadsheet application.

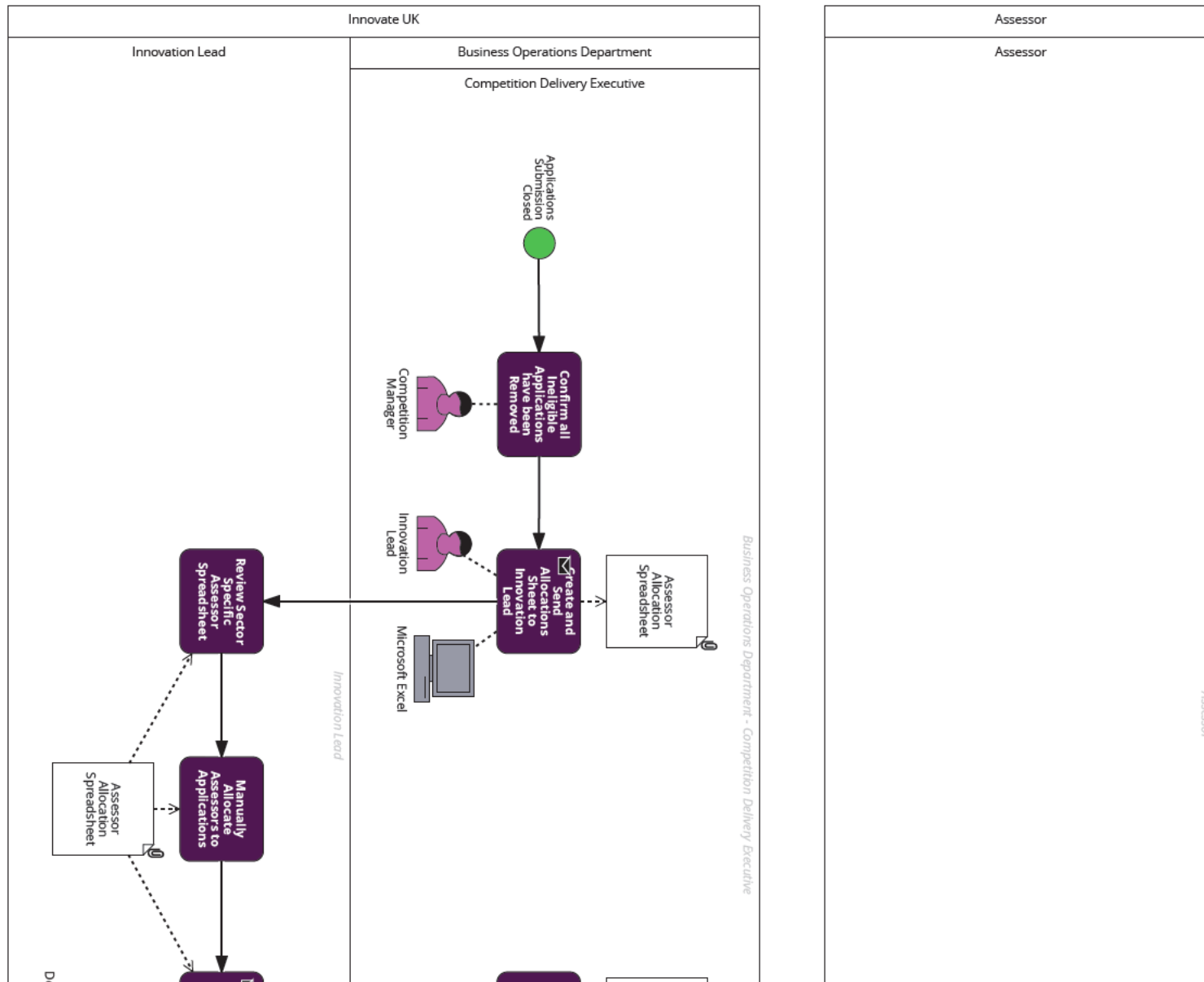
IT System Owner: Business Systems Product Manager

3.5 Documents

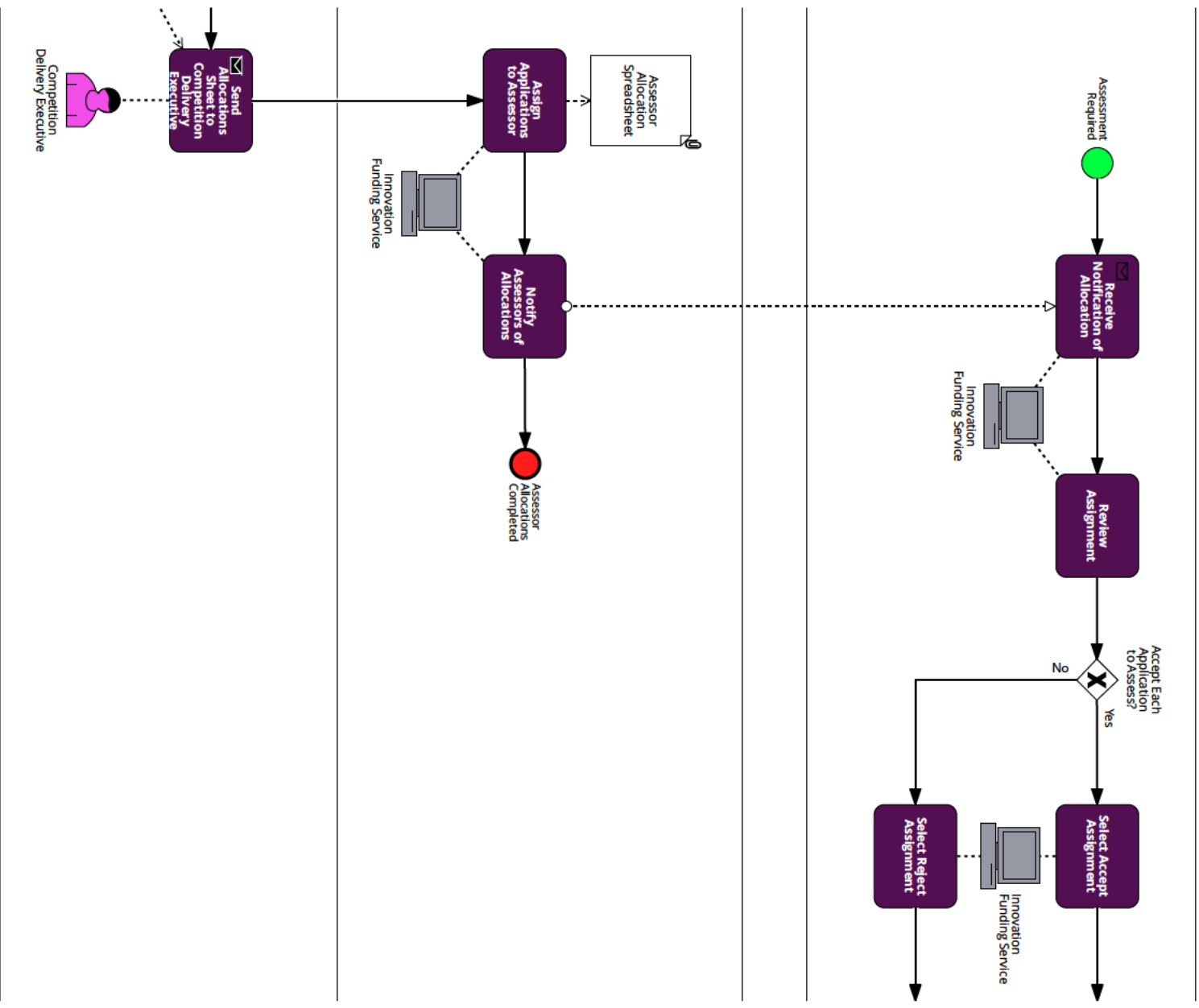
Documents used within the process.

Assessor Allocation Spreadsheet

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