Community Advisor Assessment Guide

Guidelines for the application of Scoring Criteria in the Catalyst Fund Process

Short link: https://bit.ly/CA-Guide

Outline

General Guidelines

The Community Advisor (CA) is a self-assigned role in the Cardano Project Catalyst Community.

Within this role you assess proposals in the assessment phase. You are asked to determine how well each proposal matches each of the three criteria: **impact**, **feasibility and clarity**. The combined individual score across the three criteria will give an overall score for the proposal.

As a CA you play an important role in the Catalyst funding process by providing guidance to voters who will use it to make their decisions. You are also offering feedback to proposers through your rationale.

Your assessments must be conducted independently of other CA's.

Important: You can **NOT** be a CA in challenges that you are participating in as a proposer, implementor or actively working with a proposer in (eg. rewarded mentorship). Assisting and suggesting improvements to proposers as a CA is desirable and encouraged.

Please consider each of the following points as you undertake your assessment(s):

- Assign for each criteria a score between 1 and 5.
- For each of the three criteria a score <u>and</u> a genuine rationale must be provided.
- Each criteria should be considered and assessed on its own.
- Your rationale should explain the score you have given and show proof of critical thinking. If a rationale does not correspond with the score given, the review will be removed.
- Any score without a rationale **will be filtered out** in the quality assessment stage performed by the veteran Community Advisors (vCAs) and you will not be compensated.
- Every bit of a proposal should be taken into consideration including attachments, links and the comment section below the proposal (make sure to look for these)
- Your rationale should help the voters make their decision, so make sure your considerations, scores and rationales are comprehensible and actually add value.
- Consider and communicate what additional information or improvements the proposer could include in order to obtain a higher score in future funds.
- Time is the most precious of assets. Do not waste the voter's time: your rationales must be thorough and concise at the same time.
- Submitted assessments can be edited until the review window closes.
- Be sure that you submit your assessment correctly. If you prepare them in a separate document and submit them on Ideascale, take care when you copy and paste into Ideascale.

- **Consider formatting**. Including line breaks between paragraphs makes it easier to read
- The CA tool (https://cardanocataly.st/ca-tool/#/) can help with drafting and organizing assessments (NB: CA tool does not update ideascale). Use it to keep track of your work.
- The reward system is carefully designed so that it rewards more to assessors that demonstrate a higher quality or work.. Keep this in mind at all times while writing your assessments and think long term while you build your reputation as a CA.
- Your assessments should pre-digest the projects with your critical thinking so that the voters can grasp the quintessence of the proposals and make the most insightful decision.
- If you think a proposal is in the wrong challenge, check the Ideascale comments as this conversation may already have happened. Reach out to the challenge team lead and/or proposer to see if the proposal was accepted in the challenge. If you conclude it's in the wrong challenge, score and assess appropriately. While you are at it, add additional useful feedback on the content of the proposal, it may help the proposer next time.
- Remember that you work for the voters (the community), the proposers and yourself in that order.

Guiding Principles

The following principles are designed for CAs and should be followed to help the community fulfill the intention of being **a safe and lively environment to explore the fullest potential of human collaboration.**

- **Treat proposals and proposers with respect.** In the assessment phase, you can still contact the proposer. Use this opportunity before making any assumptions. Misunderstandings are more likely than malign behavior. While it is easy to take a negative view of suggestions / messages / activities that you don't understand or disagree with, instead of wasting your energy on arguments, try to find clarity and common ground. More often than not, it is likely that you (or the proposer, or both) are simply misunderstanding something about each other / the proposal / the challenge or the context.

- **Separate the idea from the way it is written**. Considering the proposal as it is written, does it express the idea appropriately and provide a clear path to success or does it need more assistance / collaboration / resources to reach its full potential? A great idea poorly communicated can come across as a poor proposal. Offer your critical analysis of the proposals in a respectful, unobtrusive and non-accusative manner. Focus on what is said in the proposal and not who is saying it.

- **Community Advisors offer advice**. Offer your best advice and feedback to help proposers write better documentation, explain their ideas more clearly, assess risks or build stronger teams. Be aware that as a CA you should not take over the writing of a proposal. If you find a project that you wish to collaborate on, you have to change your own standing point from a CA to a proposer. The integrity of the system lies in the hands of each of us and our decisions.

- **Be mindful of your time and knowledge.** No one expects you to commit more time than you have available. So assess as many proposals as you can and know that it's enough. To assess one or two proposals is already a phenomenal help for this process. Some proposals will be technical in nature, although it is encouraged that proposers prepare their proposals at a level suitable for most voters. Don't feel that you have to provide an assessment if a proposal is beyond your technical knowledge. Even if a proposal exceeds your technical knowledge, you may still have skills and knowledge appropriate to assess portions of the proposal - in which case, feel free to do so. **Catalyst is designed so that quality will always be more rewarded than quantity.**

Scoring Criteria - Regular Challenges

1) Impact

Scoring the impact of a proposal means that you are assessing whether the proposal addresses the objectives laid out in the challenge or not. As each challenge has its own set of objectives, be sure to be fully aware of them as you conduct your assessment. The objectives can be found in Ideascale under the heading "campaign brief" in the sections about **what success looks like** and **key metrics to measure**. Since the challenge settings can be interpreted differently by different people, it is your role to determine and explain to the voter why the proposed solution fits into the specific challenge category - based on what the proposer has communicated and your own knowledge. It is not possible to effectively assess the impact of a proposal without understanding the challenge, so start by learning the challenge first. It is advised to work per challenge: focus on one challenge at a time, keeping the specific challenge's goal in mind while you assess the proposals.

Suggested characteristics of an impactful proposal:
- The proposal identifies a problem within the challenge which needs to be solved.
- The proposal clearly articulates how it will add value to the Cardano ecosystem.
- The key metrics and goals of the proposal align with the outlined challenge settings.
- The proposal is able to scale to address future challenges.

Score meaning:
- (1) I strongly disagree
- (2) I disagree
- (3) Neutral. I neither agree nor disagree
- (4) I agree
- (5) I strongly agree

  ... that **this proposal effectively addresses the challenge.**

2) Feasibility

Scoring the feasibility of a proposal means that you are assessing whether a proposal is likely to be successfully implemented or not. It is your task as a CA to assess the proposal's ability to solve the problem that has been identified. There are no firm rules for this; it will all depend on what information the proposer has provided.

A feasible proposal has considered the following aspects:
- The proposer provides evidence (references, links, etc.) of relevant skills and experience needed to implement the proposal.
- The proposer knows, in an identifiable manner, the type and number of team members required to implement the proposal.
- The budget is outlined clearly and broken down into identifiable items.
- The budget is reasonable to achieve the set goals.
- If additional funding is required to implement the proposal, the proposer has provided a verifiable plan in this regard.
- The proposal offers a realistic timetable to complete the work.
- The proposal provides a sensible and conductible plan for implementation that shows not only what is being done but also how.
- The plan describes the resources necessary to implement the proposal.
- The proposal clearly explains technical aspects like architecture, language and technologies if they are crucial for implementation.
- The proposer has considered challenges and risks relevant to a successful implementation.

Score meaning:
- (1) I strongly disagree
- (2) I disagree
- (3) I neither agree nor disagree
- (4) I agree
- (5) I strongly agree

  ... that **it is highly likely that this proposal will be implemented successfully.**

3) Clarity/Auditability

Scoring the auditability of a proposal means that you are assessing if the information provided is sufficient to audit the progress and the success of the proposal. The audit phase is essential to ensure the implementation. After successful funding, the proposer periodically reports the progress to the community. Therefore, the community needs to know what to expect from the proposer up front. As you work through the proposals look for **milestones with identifiable measures of success** which when achieved can be measured by community.

An auditable proposal has considered the following aspects:
- A roadmap with milestones and a time horizon for achievement.
- Metrics/KPIs that define the success of the proposal.
- Clear understandable description of the targeted problem.
- Clear understandable solution that addresses the problem.

Score meaning:
- (1) I strongly disagree
- (2) I disagree
- (3) I neither agree nor disagree
- (4) I agree
- (5) I strongly agree

    ... that **this proposal provides me with sufficient information to assess the progress in attaining its stated goals.**

Scoring Criteria - Community Challenge Setting

Community-defined challenges are critical for Cardano community self-governance, and generate a unique way to achieve Cardano's mission.

Challenge setting is different from other challenges as it's about proposing new challenges, for the future., Challenges define which issues and opportunities will be the focus of the coming fund, For example, in Fund 8, voters will be choosing the challenges for Fund 9, and proposers in Fund 9 will create projects to solve them. Challenges should be relevant and meaningful to the

Catalyst ecosystem and community, and address needs and opportunities that further our common goals.

1.) Alignment

This challenge is critical to achieve Cardano's mission.

2.) Feasibility

The Catalyst community has the capacity to address this challenge. Bonus if there's an established challenge team.

3.) Verifiability

Success criteria and suggested metrics are set correctly to measure progress in addressing the challenge.

Catalyst Fund9 Challenge Setting Strategic Goals

Fund8 Challenge Setting has taken input from community and IOG stakeholders as part of a horizon scanning activity to help focus and center Community Challenge Setting on some core themes and attributes. These inputs continue as an extension into Fund9 as well.

Challenges should be aligned with the Fund9 strategic goals:

1. **Prepare a group of people willing and able to make contributions to the ecosystem.**

2. **Turn Cardano into an open source project.**

3. **Accelerate the growth and evolution of developer & app ecosystem.**

If Fund9 Challenge Setting proposals do not meet one or more of the above attributes, then assessment prioritization by CAs and voters should favor proposals which do meet these goals.

Learn more about what Challenge Setting is about from this time stamped Challenge Team presentation by James Dunseith of Gimbalabs: https://youtu.be/nP0r5KwNtQk?t=4790

Definitions of a quality assessment

These are Catalyst definitions that are applied to help participants, including Community Advisors (CA), veteran community advisors (vCA), voters, and proposers to understand how assessments and review feedback should be provided so that:

- CAs are clear on what is expected of them for assessments
- vCAs are clear on what is expected of them reviewing CA assessments

These definitions have been set in consultation with Catalyst Community Advisors (CAs) and veteran Community Advisors (vCAs)

		Guidance on what is expected	
Focus	Why is this important?	EXCELLENT (where most or all are achieved)	GOOD
Positive feedback-loop	*CAs that provide practical coaching help the proposer to deliver a better project.* *The reader (voter, proposer and vCA) should be able to understand why these guiding points are important to the community advisor and how addressing them would improve scoring the proposal.*	Actionable coaching points are provided to guide the proposer about what is and isn't strong about the proposal, and / or what could be improved to become a more compelling proposal in the future.	CA has provided feedback about the strengths and weaknesses in the proposal; however the feedback either lacks clear actionable coaching points or the action points appear to be not so carefully considered to be useful to the proposer.

CA contemplation of their own ability to assess a proposal	*Individual CAs may come from a wide range of backgrounds and experience levels. CAs are encouraged to provide* **sufficient but** <u>**concise**</u> *information regarding their relevant qualifications and knowledge regarding a proposal. Alternatively, they can refer to expert sources of information (a shortened URL for example) when providing feedback so long as concise context is given as to why that source is provided. Lack of such information may indicate a more subjective opinion to the reader (voters, proposers, vCAs).*	The CA has been able to define which assertions they are better qualified to make in the proposal, can explain its fit to address the Catalyst Challenge and feasibility of plans, and which opinions are more intuitive, or outside the advisor's domain of expertise. The CA managed to achieve this **seamlessly**, showing that they know what they are talking about through careful argumentation and pertinent details showing their deep understanding of the proposal subject without pasting a full resumé. (If you are an expert in a field you should be able to teach the reader something they might not see without this expertise).	The CA demonstrates proof of critical thinking in their argumentation **But** The CA has only provided tenuous clarity about which of their assertions are made based on their own domain expertise, and which are more intuitive or they have less experience or knowledge in. **Or** It is unclear how the CA has arrived at some of their judgments if the assertions made are outside of the CAs domain expertise, or in the case that the CAs domain expertise remains unknown to the reader.

CA scoring against Challenge criteria	*The reader (a voter, a proposer and vCA) should be able to understand how the score reflects the advisor's perspective and feedback provided.* *Specifics within the proposal are highlighted to illustrate understanding, and the advisor has provided supportive rationale that is aligned with the criteria.*	The CA has provided a reasonable and thoughtful justification to support the scoring. CA feedback addresses specific content assessed in this proposal. CA feedback is comprehensive and demonstrates that the entirety of the proposal was considered and understood. The CA score and comments are well balanced and logical, indicating that the feedback was based on a sound analysis of all the information provided.	The CA has made a fair attempt to justify their scoring against the challenge criteria; however the feedback generally lacks specificity or clarity to support their rationale and scores but is still useful and adds value to the voter.
CA opinion on the proposal overall	*Each challenge has its own intended outcomes. The job of assessors and voters is to qualify the validity and appropriateness of the activities described in the proposal and if it is a good use of Cardano Treasury funds to achieve these.*	CA feedback comments are unambiguous and they demonstrate a strong grasp of the objectives of the Catalyst challenge and the project team's objectives to address the challenge.	CA commentary demonstrates a basic understanding about the project's objectives to address the challenge; however there are gaps identified in their feedback or the feedback lacks clearly documented understanding.

Accountability to the Community	*Measures being taken so the project team remains accountable to the Community is at the heart of Catalyst.*	The CA clearly identifies how the proposing team will demonstrate their positive return on intention. CA scoring is backed up with supporting rationale whether they either agree or respectfully disagree with the realism and clarity of the plans and budget to deliver value for money appropriate to the project's intentions.	The CA has provided feedback; however, there are gaps identified and feedback is missing related to the proposers' auditability, project plans or budget appropriateness to deliver the project's intentions.

Insight for Length: In general, assessments with a length between 2,000 - 4,000 characters (300 - 700 words) across all 3 criteria do well. This is a guide, not a rule. Longer assessments have received a rating of excellent, as have shorter ones. Quantity is not a determinant of quality, and you should be as succinct as you can while still adding value.

Observing all the above can seem daunting but if you focus on being genuinely useful to the voters and the proposers by offering them your critical thinking abilities then your assessments should naturally fit.

Inadequate Assessment Statements:

Rationales similar to these given below are not in accordance with the standards of these guidelines as they do not offer guidance to voters and to proposers, **and will be filtered out**. To have your assessments counted towards the overall rating, inadequate assessment statements should be avoided.

For information about the reviewing-the-assessments process, please follow the guidelines for vCA (veteran Community Advisors).

No rationale given:
- This proposal is only fishing for funds.
- This proposal is irrelevant.
- This proposal is missing the point.
- I can't rate the proposal.
- Please don't vote for this proposal.

- It is a very good proposal. Should be implemented.
- This proposal (does not) effectively addresses the challenge.
- It is highly (un)likely that this proposal will be implemented successfully.
- This proposal (does not) provides me with sufficient information to assess the progress in attaining its stated goals.

Only a personal opinion given:

- This proposal is terrible.
- I like the idea but not the proposer.
- Is this a joke?
- Too many similar proposals.
- Asking for too much funds.

Unconstructive assessment:

- The proposal is poorly written, there is not enough information to properly understand it and it's purpose completely mismatches the challenge goals.
- The proposer's experience is not enough to execute the project, and there is no information about hiring experts. Very unlikely to be successful.
- This is a wonderful proposal, one of the best I have seen so far. It will have a tremendous impact on Cardano's future. The team is also wonderful and is sure to deliver!

Further Aspects of an Inadequate Assessment:

- The assessment is given from a biased perspective.
- It is clear that the proposal was not read through by the CA.
- It is clear that the scoring criteria and assessment guidelines were not applied or understood by the CA.
- The CA lacks clear articulation of the rationale for the assessment in a constructive way.
- The length of the assessment is insufficient to provide value, for example less than 150 characters across the three criteria fields of the assessment. These will be filtered.
- The assessment is composed of nonsensical, meaningless content. Here is an actual example of this from a previous assessment.:
  "I acquiesce considering causation learnedness peripheral heterogeneous cruxes that are assiduous is key to be dextrous to swooping auxiliary peeps with frailer together with no milieu in this stretch."

A great way to prevent yourself from falling into bad assessing habits is to read some of the previous funds' filtered assessments. Copy/pasting templated content across assessments will be flagged in the review process by a similarity analysis (see next section for further details) and will often result in the assessment being eliminated.

Examples of high quality assessments for inspiration and training:

A great way to write excellent assessments is to first read examples of excellent assessments, and get a feel for their structure, style and approach. Prior to getting started, and in order to make the most out of your investment of time and intention, it is recommended that you peruse a number of excellent assessments from previous funds. You should also review the inadequate examples later in this guide to prevent habits that produce low-quality results and cause assessments to be filtered in the review process..

Community Advisors who take the time for this important step at the beginning are far more successful at producing quality assessments and providing value to the community. You can also refer back to these examples for inspiration as you work. Remember, these are here as a guide only. Your work should be your own.

These are three examples of top-rated Fund7 Assessments, followed by a link to the eleven best-rated assessments from Fund7.

Assessment Example 1

Proposal: Stakeboard: Social Staking Platform
Link to Proposal: https://app.ideascale.com/t/UM5UZBrJv

Impact Assessment: Rating of 5 (I strongly agree)

"The problem described in this proposal is closely aligned with the challenge. Decentralization is a central and very important pillar for any public blockchain. Even though Cardano has an excellent distribution of block producers compared to other PoS blockchains, it is important to note that in the crypto space there are many cases where the competition is leveled down, specifically in this case it is the problem of PoS blockchains that have few validators (less than 30) and in many cases different validators are controlled by the same entity. "

"Decentralization is what ensures security and censorship resistance in a public blockchain, as it makes the costs of attacks (like 51% attack) higher, discouraging block creators from colluding to attack the blockchain. The proposal clearly and objectively describes the pain points that centralize the production of blocks in Cardano, which are large exchanges and owners of multi-pools."

"The proposed solution intends to facilitate the UI/UX of those who delegate through a marketplace. As a moderator in the Cardano community I receive complaints almost daily from users who have difficulties in seeking information about how and where to choose a pool. Today this type of information is manually curated in the vast majority of cases and having a platform that can offer curation has good chances of leveling the playing field between SPOs."

"The metrics/indicators/KPIs indicate a great potential impact on the SPO ecosystem."

Feasibility Assessment: Rating of 4 (I agree)

"First of all, Stakeboard is already a project in full development and with several deliverables completed before receiving funding from Catalyst, which indicates a reliable and productive team."

"The information about the team described in the proposal is detailed, the experiences described and the work already performed indicate that the team is fully capable of developing this work. The budget breakdown describes 3 items, however there are few details on how the money will be spent. The definition of $5,000 for "UX" seems vague to me, which compromises the feasibility assessment of the requested budget. I would like to see more details indicating the amount of work for each step/time required x corresponding remuneration."

"Despite the vague requested budget, I believe the requested amount is reasonable given the compensation of 2 engineers and the proposed deliverables. The roadmap is very well prepared, there is clarity in the timeline, deliverables/milestones over time."

"The plan itself does not present great technical complexity or barriers, as the concept is more focused on curating information/data on a website. The only point that I see as a risk and that raises questions about the feasibility of the marketplace is how Stakeboard will deal with the language barrier, considering that the goal is an easier UI/UX, how non-English speaking users will be served?"

Auditability Assessment: Rating of 4 (I agree)

"There is clarity in the description of the problem, the solution and how the proposal is aligned with them. The roadmap is very well designed, there are deliverables/milestones that make auditing the proposal easier."

"The metrics and KPIs were well chosen and I believe they are good indicators for evaluating success, as the chosen outputs would clearly indicate the number of users and participating SPOs and the progression over time."

Assessment Example 2

Proposal: Blockchain Latam Ecosystem Mapping
Link to Proposal: https://app.ideascale.com/t/UM5UZBrRP

Impact Assessment: Rating of 2 (I disagree)

"I found the idea of this proposal a bit confusing, and I'm not sure if it aligns well with the challenge's objectives. As I understand it, the project here would consist of drawing up a mapping of the various projects involving blockchain in Latin America. There would be a kind of data collection and analysis, with the

objective of understanding in a general way how Latin American investment and entrepreneurship is in relation to blockchain. However, I have some doubts about the usefulness of this. Starting with the fact that at no time, during the description of the proposal, the team quotes Cardano, emphasizes specifically on how our blockchain would be targeted, explains how such research would happen, what kind of data they would analyze, where the results would be presented. I also found it a little confusing to understand what the events they talk about at the end of the proposal are about: "With this, after each event the status of the activity metric will be shared with Catalyst". At no point during the proposal description was it explained what these events would be, I imagine they could be conferences with the aim of exposing the research done, but it would be essential that we had full understanding of all parts of the proposal. I also found it a little difficult to understand what the intention of such research would be, the authors claim that they would understand what is missing in the development of projects with the aim of improving them. However, this is quite abstract, each project that involves Cardano has a specific bias, I don't understand how a single group would be able to promote solutions for different types of projects. I think that Latin America would be benefited, while the projects developed there were contemplated with this kind of consultancy, benefiting the people involved and perhaps maximizing the results; the Cardano ecosystem would also benefit if the projects directly involved our currency, our blockchain, NFT and other ecosystem technologies, but as I said before, they don't directly cite Cardano at any time. That's why I think the proposal doesn't seem to bring the impact we're looking for, it doesn't clarify very well how the activities would be carried out, whether the studied content would only be known to the team or there would be some kind of exchange between the entrepreneurs, forming a network of connections. .. There are several doubts."

Feasibility Assessment: Rating of 2 (I disagree)

"The team provides us with an individualized description of each member so that we can get to know them and understand well what their work is all about. What I missed was, in addition to knowing their names and roles in the project, a brief history of previous work and mainly: how do these professionals relate to the Cardano ecosystem? What are the ways they dialogue directly with our blockchain? Usually in projects we have at least one person who has technical knowledge about our blockchain technologies, but that doesn't happen here. It is positive that there is a person whose role would be to monitor the KPIs and a person specialized in marketing, but it would be essential that there was also someone from the technology area. As such, the team does not convey much confidence in its ability to carry out the project successfully. Regarding the script, here we have the establishment of activities that would be carried out based on the months - but I believe that this part lacked details. Each of these topics could have been explained better, the explanations are very superficial. For example: in the first month, what would happen would be basically a field preparation. Analyze what would be done and how. But who would work on this part, what methodologies do they intend to adopt, what would be the weekly mobilizations? Likewise, there are some doubts regarding the activities developed in the other phases. And about the budget, it's the same: they even provide an explanation, but it's very short. "Communication, PR and Marketing = $12,400". Why this value? How much would it go to communication, and to PR, and to marketing? What would be the marketing strategy used? The total amount requested is relatively high, with more than 1/3 destined for this part of the disclosure... it needs more detail to understand what was actually going to happen."

Auditability Assessment: Rating of 2 (I disagree)

"The team does not establish direct KPIs that would serve to monitor project success. What we have here is, at the end of the proposal, a somewhat confused explanation about some events (as I said in the first analysis topic, it would be important to understand what they are about: their content, who would participate, where they would happen...) and also on the preparation of a report at the end of 1 year of work. But since we don't know what these events are, no confidence is conveyed that activities would actually be monitored. I think an annual report is a very big thing, it should be done monthly. Since we have a person on the team (Paula) who would work directly with KPI control, I think we could have a more detailed and concrete auditability. In addition to the monthly reports, some type of contact could be made with the teams of the projects that were analyzed. A kind of gathering of feedback, in other words, so that we could understand how these consultancies positively impacted their projects, what difference, in practice, the project in question is bringing to the continent. In the reports, it would be essential for the authors to clarify how the activities have specifically benefited our blockchain, as this is somewhat uncertain in all the details of the proposal. In general, I do not agree that this proposal is easily auditable through the information provided, I cannot see direct ways to evaluate the process or the results based on what was presented to us."

Assessment Example 3

Distributed Work-Reward Mechanism
Link to Proposal: http://app.ideascale.com/t/UM5UZBm5R

Impact Assessment: Rating of 4 (I agree)

"I believe the proposal addresses the challenge, nevertheless the proposal seems to be oriented to the "attribution, valuation & reward system" of relatively small projects, and even though that is a contribution to the challenge, it is not clear, given the information provided, how the team foresees that their project may scale up to the current and future requirements of Project Catalyst and Voltaire (i.e.: Cardano in general). The proponent team demonstrates experience, knowledge, and interest in the issue at hand. I understand that they are proposing a learn-by-doing approach and that they are emphasizing the execution and documentation of their experiment. I highly recommend that, if the proposal is funded, the team pays special attention to thinking about how their experience besides being transferred to other organizations in the Cardano Ecosystem, may be scaled to contribute directly to Project Catalyst ASAP and to the Voltaire era in the near future, to extract the most value from their effort to the community."

Feasibility Assessment: Rating of 4 (I agree)

"Given the experience presented, I believe it is highly likely that the proposal will be implemented successfully. Nevertheless, I also believe that the team has designed a very tight schedule, in particular, to achieve the "test runs" and their documentation. As we all know in the blockchain space, this type of sequential trial has a tendency to stretch timelines. Furthermore, in this proposal, the team provides milestones for three, six, and twelve months but only a detailed roadmap for three months. It is not clear or convincing (from this lack of information) how the team will fulfill its long-term goals. I am aware that the team has indicated that this proposal "will inform and provide support materials for SecretDecks "Off to

On-Chain Self Governance" proposal", and I will do my best to assess that proposal also, but the assessment of this proposal has to rely only on the information it contains and [it is] from that (absent) information is that I signal to the team and others this issue of incomplete information. It seems to me that the team trusts their capabilities and experience and has elaborated a "fuller" plan but is in the process of dividing it into sequential proposals could not track the completeness of all the information necessary to keep this proposal whole. As the team seems competent and experienced, and interested and dedicated to the project, these underly the confidence that I assign to their success. Nevertheless, if they are funded (but also if they are not) I would suggest paying attention to the issue of completeness of each individual proposal for their execution (or for their inclusion in a future funding round)."

Auditability Assessment: Rating of 3 (I neither agree nor disagree)

"The information provided is sufficient to fully audit the progress and success of the first stage of three months of the proposal. Also, the milestones provided are sufficient to evaluate the success of the project at six and twelve months. Nevertheless, a dedicated and experienced auditor, with technical knowledge in the specific domain area (software development, SourceCred, blockchain, Cardano stack? etc.) will be necessary to be able to evaluate progress within the three and six and the six and twelve month periods. Furthermore, the second component of the six months milestone "achieved self-funded status." is something that no project (in history) has guaranteed and that there is no way to guarantee. Yes, it is highly probable to achieve this goal in blockchain technologies, nevertheless, it is not an adequate milestone as it is very much independent from the work of the team."

11 Best-Practice, highly rated Rated Assessments from Fund7

[Here is a link to eleven best-practice assessments from Fund7](#) (community resource)

Consider this as further reading to help provide more examples of what excellent assessment work looks like. Just remember that each proposal should be considered an individual piece of work, and should be assessed in its own right. Comparing one proposal over another and using a comparative judgment approach, where two or more proposals are considered and scored side by side of each other, is not best-practice.

Examples of Inadequate Assessments:

Here are some examples of assessments that fell short and were filtered out.

Length check: (9 characters)
Impact: Yes

Feasibility: Yes
Auditability: Yes

Length check: (132 characters)
Impact: nice idea, proposal well presented and clear. it addresses the challenge completely
Feasibility: experienced team
Auditability: everything is clearly auditable

Length check: (148 characters)
Impact: Will fill a great need in the community if executed properly.
Feasibility: Team seems to have a good plan in place with the needed pieces to execute.
Auditability: Looks great

Similarity check:

Similarity check: (used by 6 CA's in Fund 7)
Impact: It's a good-value project that will address an immediate need in a quick and straightforward way, so it should be quite impactful

Similarity check (used by 9 CA's in Fund 7)
Impact: The solution proposed by the proposer was very specific, it solved some of the most important challenges in the campaign

The assessment has been completed.

What happens next?

Reviewing the Assessment Process

This is a self-correcting process which precedes the Ballot Submission phase and provides a service to CAs and proposers by enlisting Veteran Community Advisors to review assessments for quality and pass only the good and excellent assessments forward to voters..

In The Week Following CA Assessments:

1. A similarity script will be run centrally looking for similar assessments in the current fund and across previous funds. These will be flagged for potentially being discarded.
2. A length check will be done centrally, assessments with a character length of of 150 characters or less (across all 3 criteria) will be flagged for potentially being discarded.
3. Blank assessments (at least one of the 3 criteria is left blank) will be discarded.
4. Assessments that display copy/pasting of templates without thoughtful contribution of value specific to the proposal will be flagged for review and potentially discarded.
5. Community members will review assessments looking for evidence of gaming/nonsensical assessments. These will be flagged for potentially being discarded.

Discarded assessments will not be taken forward into the vCA review phase and will not be eligible for rewards.

Then, Veteran Community Advisors Have Specific Time to Review Assessments:

1. An anonymized CSV-file containing all assessments will be passed for peer review by veteran CA's who will filter out substandard assessments. (Tool such as the vCA-tool https://cardanocataly.st/vCA-tool/#/ exist to assist with this)
2. Proposers will also be invited to report substandard assessments.
3. Experienced CA's (known as vCAs - veteran Community Advisors) decide which reported assessments should be excluded.
4. A Catalyst admin removes the results of step 3. A list of all removed assessments will be published and a retrospective to review the process for the next fund will be held.

Ballot Submission

- The assessment score and a link to the proposal's URL on the Ideascale innovation platform will be visible from the Catalyst Voting app.
- All rationales provided by CA's will be attached to the original proposal in Ideascale.

Anonymity

Identity of the CA will be kept anonymous in Ideascale. However, despite our best efforts and testing, there's always a small risk, because of the nature of Ideascale being a 3rd party tool, and anonymity being an experimental feature, that the CA's identity might become known. Please make sure you understand that risk before assessing proposals.

Rewarding

Community functions (advisors, referrals, etc.) are rewarded usually within two weeks after fund results via wallet addresses as noted in their ideascale profiles. Your wallets should be up to date by the time results are published. There isn't a specific 'rewarding date' due to complexity of the process and related human processes.

Reward Scheme Upgrade for Community Advisors First Initiated in Fund 6

The goal of incentives is to assure CAs will provide a thoughtful and fair assessment to all proposals, and that each proposal will receive at least three assessments. Therefore:

A total of 5% of the challenge fund amount will be allocated as incentives for CAs and vCAs:
- 4% will be allocated as rewards for assessments to CAs
- 1% will be allocated to incentivize those reviewing the assessments (vCAs)

Goals of the reward upgrade:

- Grow the community of Community Advisors sustainably, keeping a core of qualified professionals, with fair rewards as an integral part
- Provide incentives for high quality reviews
- Provide comprehensive analysis for high budget proposals
- Ensure that each proposal is reviewed and CAs reviews are quality assured

in order to provide Community Advisors with:

- Transparent reward scheme
- Predictable reward amount dependent on quality level of the review;
  if there are risks - they must be understandable and have clear strategies to be handled
- Support for an option for gradual skill improvement: seasoned reviewers would get greater rewards for high quality reviews, new reviewers would still have a reason to contribute.

For more details on this new rewarding algo - please reference Catalyst town hall slides [here](#) and video explanation [here](#).

Main changes from previous funds

Implemented since Fund8

- [This document outlines the changes](#) in rewards and reputation management for veteran Community Advisors.
- Quick word about The Sustainable Development Goals (SDGs) fields in Ideascale
  - Since Fund8, there is an optional field for Proposers to submit/highlight SDG ratings to their proposals where relevant. This is part of a Fund6 funded project initiative that introduced the concept for the Catalyst community. In Fund8 it was considered as a part of the actual submission form. You can learn more about it via following links:
    - Closing Video: https://youtu.be/ypg6OwoIhyU
    - [Doc report](#)
    - [Presentation](#)

Implemented since Fund7

- This document was produced to give a clarifying overview of the rewards structure.
- New assessment review tools are in place, including: an activity database MVP to chronicle CA involvement over time, a singularity assessment script and exclusion threshold to auto-filter mal-intentioned CAs, and a simple reputation MVP.

Implemented since Fund6

For Community Advisors:

- The number of assessments rewarded per proposal increases from 3 to 5.
- Assessments are going to be classified as Excellent / Good / Filtered Out.
- **Excellent assessments will receive 3 times more rewards than Good ones**
- Filtered out assessments will not receive rewards and will not influence the final score
- Each proposal's rewards budget fits 2 Excellent and 3 Good assessments.
- **If there are more than 2 Excellent or 3 Good assessments, a lottery system is used.** The CA rewards system [is explained in this document.](#)
- Bonus rewards are available (20% of total CA rewards budget) for assessments. 'Approved' by the community (not necessarily funded), proportional to the proposals' budget.

Veteran Community Advisors (vCAs)

- Rewards are **proportional** to the number of reviews made

Please direct any further questions to the Telegram channel: *CatalystCommunityAdvisors* or the *CA/VCA Discord Server.*

To view Catalyst School workshops on "How to be a Community Advisor" and "How to be a Veteran Community Advisor," please visit the Catalyst School YouTube Channel.

This document was last updated on March 12, 2022 with major updates and is in effect for Fund8.

The Project Catalyst team thanks all our CAs for helping to build the future of Cardano and to co-author these guidelines!