

Comments on Idealware's Sep 2006 Survey: Should Idealware Accept Vendor Funding to Write a Case Management Report?

A note on these comments: the scenario laid out in the survey, that several people responded to, was " One of the software vendors who would be reviewed has suggested they may be willing to fund the entire report. They would pay in advance, have no editorial control, and the Idealware writer in charge of recommendations would not know who had funded the work. The report would state who funded it, and Idealware would as always be committed to writing an unbiased and candid report."

There's no real control over how others might react to the potential bias inherent in such a collaboration, but the overall statement, 'The resulting report would be more useful than no Case Management report at all,' is the overriding mantra. I believe Blackbaud hosts and/or provides workshops/training sessions which discuss general principles, but highlight their software, explicitly in the advertising. As long as it is presented with all disclaimers, up front, I don't feel it's deceptive. I'm on listservs where many inquiries/discussions are presented re. case management software, so I believe the interest is definitely here! Good Luck.

The e-mail invite was perhaps intentionally vague - I clicked through not knowing the topic was Case Management packages. Those packages are not relevant to our organization, which is why I answered negatively above, but am generally satisfied with the reviewing process as laid out. Were a similar situation to arise re: software that my org might actually use, I think it's preferable to avoid funding from vendors, but if you remain committed to the editorial independence, that's 'better than no report at all.' Last comment - if the report is being moved onto or up the list of project priorities because of the availability of vendor funding, and its completion means that other reports that might reach beyond the human services sub-sector aren't getting done,

Be sure you do all of these things. And be extra sure that the vendor gets it and states it in writing. I know that NPower's heritage of Microsoft funding has made its efforts to be impartial more challenging.

Perhaps if the conditions of the vendor 'grant' were also included in the report then I could trust the veracity of the information. Without the assurance that the funder had no influence over the content and results of the report I would discount the report usefulness.

Listen, you need money from somewhere. If you are super up front about it, people will trust you because you are a good organization. One possibility as a mitigating factor, reach out to other vendors about splitting the cost or creating a pool to fund ongoing or quarterly updates to the report.

Lord Bless

It's a little bit questionable, but I think it could be okay. In my mind there's a difference between them purchasing a copy of each software package for you to review (to move the process along) vs. 'Here's ___ dollars. Please review our software.'

I think it is a slippery slope...other vendors will complain as well, and impune your findings - no matter how strict you are and how impartial. It is ok for PBS to get funding from an oil company for a theatre production, but not for NOVA or the NEWS HOUR...Maybe the vendor would support your overhead so that you could then afford to do the survey report independently...

This is a very tough one, as you can see by my wishy-washy responses, but the thin edge of the wedge for possible greater influence in future. Could we be sure that all the very best vendors are included, for example? Thank you for asking.

It is not uncommon for this to happen and I strongly promote the opportunity for you to make this happen. The need to have this information outweighs the potential impartiality as far as I'm concerned. It's still the customer's responsibility to determine their needs, weigh their options and make the choice. These types of reports only help identify options. Thanks for asking, Laura.

I trust you because I know you - if I did not, my answers would be less trusting. I suggest that rather than have a vendor fund a report in their specific area, they fund the next report, or provide funds for future unrelated reports. Of course this could still look wierd, and lead to the possibility of pressure. It would become hard to decide to leave their name out if their product didn't make the cut for the final 10 you review, and very hard to say if the product is crap and the support is dreadful. If there was a less direct way for funds to be

Ah the moral and financial quandry! Yet I believe you have the right tack: 'the Idealware writer in charge of recommendations would not know who had funded the work' I would say that's similar to newspapers. At least you're getting funded to write the report!

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<p>As long as disclosures were made up front (not in small print) about the vendor funding and how the research was conducted to produce an unbiased report, there should be no reason not to use the report.</p>
<p>this is not a type of software i use. however, i believe this type of information would be helpful to those who do.</p>
<p>It's a true dilemma and one I'm not sure there's an easy answer for but here's a couple of thoughts. Hope they help. - If the report is negative toward toward the sole funder's software you've probably lost them (and probably any other vendor) as a sole future funder but you'll have proved a point. - If it's very positive, suspicion will be rampant, whatever safeguards you have taken. - As tough a road as it is, I think you've reached the point that Choice online has made i.e. you make certain of your reports public but you charge membership or access fees for the rest, leaving you perhaps less financially secure but with an impeccable record for impartiality (which can't be regained once lost.) - Perhaps another alternative is to create an Idealware Foundation which many companies contribute to (and would perhaps feel some pressure to if they believed their software was any good), similar to the way that many sponsors support conferences but this then offers them no real protection from</p>
<p>This is a hard one. I know you need a sustainability strategy but also need to remain an impartial source of information to really be of any benefit. Many of us who provide services at low or no cost are in the same boat. I would love to hear how you navigate this decision. Meanwhile, keep up the great work!</p>
<p>Think: drug companies, doctors, research reports, and the integrity of the data produced. I think the integrity will probably not be questioned (much) at first. But it's a very slippery slope. How long will the perception of your ethics remain above reproach? Just something to think about. Today there is a collective tendency to value short term profit over long term gain. What have been the long term consequences of other organizations that</p>
<p>we are a nonprofit organization that takes on funding from industry. Like you are considering, our funders have no editorial control over our content and our writers don't know where the money is coming from. I don't have a problem with this. I don't think you should have a problem with it as long as your funders are doing this for the publicity and to support you and are not doing it for the positive review.</p>
<p>In the end, integrity is a faith-based institution, but I would trust Idealware simply because the general personality of the organization is very trustworthy. However, I think this practice is not a good idea. Another idea might be to use a 3rd party foundation or nonprofit through which to funnel the funding. This might create the appropriate level of separation to provide projects that maintain their integrity.</p>
<p>Even if you are able to keep 'chinese walls' up between funder and reviewer, you will have lost a lot of uniqueness, and your credibility. Better to have readers pay a nominal fee for the report than to accept funding from a vendor in the same space. Sell the report: \$x for a pre-reserved copy paid for prior to some date, \$5x for a copy purchased after that date. Allows you to fund your activities and still remain unbiased.</p>
<p>Whether they are underwriting a study or paying for advertising the Case Management software vendor is looking for a way to publicize their product. And while an offer of project funding is certainly alluring to a young nonprofit, it is very difficult to maintain an unbiased appearance when 'tainted' money is funding the operation. I would not dismiss the information but would be more critical of it. Further, I would be suspect of future Idealware reports as well. It's a tough decision. Good luck.</p>
<p>As a professional software test engineer, I have an abundance of comments. I will try to be brief. Gartner group, as well as 100 best Companies to Work For, and other organizations regularly charge exorbitant fees to the organizations or software they evaluate. Industry magazines accept ad revenues from companies they evaluate -- often placing the ads next to the articles. gartner and others often do not divulge these facts except in the fine print. However you also have an obligation to be fair and impartial. In the past you have often failed to get feedback from the vendors you appraise. As for this arrangement impairing your 'impartiality' you should realize that as a non-profit allied with 'Progressive' politics, to some folks your impartiality is so-so anyway. NARAL sponsors DIA. Idealware works with DIA. As a person who believes in the right to life but is also an engineer, I like your technical perspective, but i cannot agree with your politics. I believe your appraisal of CFS</p>
<p>My perception of disclosure and impartiality would determine how useful the results are to me. If Ideaware recommendations continue to appear accurate, I don't have a problem with where the source of funding.</p>

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<p>The concept of vendor payment made me pause, because it seems like a possible first step on a slippery slope. (I've had bitter experience of funder priorities interfering with mission before. It's not a good thing.) But your stated stipulations about anonymity and lack of editorial control seem solid to me--still completely aligned with your mission. I probably wouldn't use the report to make software decisions because our service model doesn't use a case-management system per se, but I'd still read it, because I read everything you put out!</p>
<p>My responses are influenced by the fact that I don't work in a human service organization and wouldn't have use for case management software. Also, I would've liked to have had a 'somewhat (dis)agree' option. ... I know that the humans who presently make up Idealware would not allow their impartiality to be impugned by the source of funding, but I've seen the impact that corporate funding has on nonprofits who help other nonprofits make IT decisions. It's a mixed bag, both in practice and in perception. Even if the staff at the funded org are angelic and supremely ethical, the general perception won't necessarily reflect that. Nothing's perfect, of course, but obtaining vendor funding certainly confuses things. My suggestion: Don't accept vendor funding.</p>
<p>I'm disagreeing about the Case Management report because it's not applicable to our organisation, not because I don't think it will be any good.</p>
<p>In this case, since Idealware already knows the vendor who would fund the research, I'd say go ahead and take it, if it means getting the research done. Although, in the future, Idealware should consider seeking blind funding for future initiatives. Have an outside organization or individual solicit and process donations from vendors, making sure that no Idealware staff are aware of who made the donation. File the donations in your end of year reports, or release the contributions to the public after the report has finished.</p>
<p>I think you have proven hitherto that you are impartial and a great resource! No worries. PS. I only chose 'Agree' on the first question instead of strongly agree because we aren't a human services org. But it will probably have some useful info anyway.</p>
<p>If links to vendors weren't a problem organizations like NTEN, TechSoup and NPower would already have done this sort of thing. But the truth is, there's no way to keep either the appearance or the reality of influence out of your work once you start relying on money associated with vendors. No matter what your editorial policy, you'll end up changing the way you make decisions. And then the unique place you have in the market place is lost, and TechSoup etc. could (and eventually will) do Idealware's job just as well.</p>
<p>Some questions to consider (maybe you have already considered them): 1. Why is the vendor willing to give IdealWare money? I assume they are a for-profit company, so they must see some benefit in it for them. Does IdealWare want to directly or indirectly be benefiting a company by accepting money from them? Will accepting their 'donation' set an expectation, intentionally or unintentionally, on the part of the vendor? 2. No matter how hard you try to avoid it, would IdealWare be influenced by the gift? How could you not be? Maybe not in this study, but in some other way at some other time, you will be influenced. 3. Would this open the door to all manner of vendor or supplier to start offering you money to do a study of their class or category of product? 4. What happens if the study finds that the vendor's product is the best? After taking their money, how do you say in the report that they have the best product without looking like you were bought? This reminds me of the</p>
<p>This is really tricky. The analog exists in the commercial space. Gartner is trusted because they fund a lot of their research from user fees. But at the same time they do 'commissioned' research that is basically marketing ware for vendors. They can afford to do this because they have long term brand recognition and a reputation for good research. This would probably be very difficult for IdealWare to pull off before that reputation is firmly established. I realize there are differences, as idealware would propose to separate knowledge of funding from report writing, but in practice this is difficult to do in actuality, and certainly difficult to avoid the perception of</p>
<p>It doesn't matter how good your firewall is -- the perception of influence is too powerful. Vendors' goal is to stay in business. Yours is to stay in business, and your business is providing trustworthy information. If this vendor is any good at all, they'll be around again in the future, and if you're any good, you'll stay in business too. Yes, THIS writer of THIS report THIS time may not know that BigShot Software Company is funding the report, but the exec director will know -- and that will influence the kinds of projects she conceives of in the future, and will make private foundations more likely to say 'well, can't you get a vendor to fund it?' if she comes to them for money. Research shows that even getting free pens and notepads influences doctors' prescription-writing -- EVEN WHEN THEY ARE CONSCIOUSLY ADJUSTING FOR IT, and pride themselves on being objective. Bottom line: there is no way for this not to contaminate your organization, especially over the long term. If the</p>

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<p>I'm afraid we have no need for case management software.</p>
<p>Regardless of how big or bright you put your 'unbiased' tag on the report, the fact that it was funded by a vendor will always make it questionable, and give a way out for those vendors that did not fund it. They'll say, 'well, of course, so and so funded it, so we wouldn't be surprised that our product was rated low'. You can never put a stop to such bad mouthing, even if it wasn't anywhere close to the truth. However, if that is the only way to actually get the report generated, that is if without the funding the report would be killed, then it's definitely worth doing it regardless of whether your objectivity would be questioned.</p>
<p>First - the only reason I wouldn't use the report is because I have no need for case management software. I understand the motivation here, but it's really bad business practice, and no reputable company with similar aims engages in practices like this. I understand that the sponsoring vendor would have no editorial control etc, but it still just doesn't feel right. Maybe this will make your users realize that they should really pony up with the donations! And have you guys applied for any grants? It seems you are providing a wonderful, needed service this crosses a line, vendor independence is key.</p>
<p>The only way i see it being acceptable is if you state up-front when the report is delivered about the funding and what it did effect in the report and wrote all that out in the report intro as well. (i.e. if really the reviewer didn't know who gave the money, the company had NO editorial control, etc. etc.) but even then you'd probably still I'd be curious about repercussions from the vendor if their software got a negative review!</p>
<p>I think if there is transparency and full disclosure of the funding source and review process for the readers, it wouldn't affect my decision as to the trustworthiness of the reporting. However, there does appear to be something of a conflict of interest if you're looking to critically review products produced by the company that is funding the study. As a young organization, it may not be a wise choice to continue earning the respect of your</p>
<p>As long as the impartiality of the report is prominent and the integrity of idealware is not compromised, I personally have no issues with accepting funds from vendors. Thanks!</p>
<p>I only say that I wouldn't use the report to make software decisions because it's not the kind of work I do.</p>
<p>As a Software vendor Company (CIWI GmbH) we might be interested to cooperate with your Case Report Study. If you are interested please contact me.</p>
<p>This is currently an issue with a great deal of research, especially pharmaceutical research and that conducted by universities and colleges. Once you go down that road there's no telling what would follow. The arrangement you describe in the survey seems too good to be true. When something seems that way, it often is.</p>
<p>We don't do case management, so I don't care about this particular report, but I understand your general concern about perceptions of partiality. I used to work for WebMD, where this is a major concern. I think it's very important they you do a full disclosure, as you have above, at the beginning of the report, and that the funding side have as little contact with editorial as possible. I would also worry about future projects that are funded this way, as it's easy to compromise little by little. Set up a full set of rules now, and stick by them.</p>
<p>You may recall that I did a very in-depth survey of nonprofit law firm (legal aid) case management systems. I have had extensive experience serving as a consultant to nonprofit law firms around their decisionmaking in this area. I can assure you that if the report had been funded by a CMS, its objectivity would have been compromised. In fact, no matter what you do, the vendors who don't come out as well in the review will find reasons to question its objectivity, and you don't want to give them even more ammunition. I strongly urge you to resist the lure of vendor funding. It would be much better to find foundation funding. Just look at what's going on with health care and pharmaceutical company funded studies -- no one trusts the studies, even when they</p>
<p>It would help if you had this wording or wording like it plastered all over the report 'They would pay in advance, have no editorial control, and the Idealware writer in charge of recommendations would not know who had funded the work. The report would state who funded it, and Idealware would as always be committed to writing</p>
<p>As a vendor, I do not believe that sponsorship would havee any impact on the report findings. But I do believe that many non-profit employees might believe otherwise.</p>
<p>I feel your pain, Laura. Money has to come from somewhere. I really like all the controls you put on it, and once I read it it seems valid, but it does take you down a notch in credibility. Don't get me wrong, I'll still read it and use it, but I do view things like Consumer Reports differently than Tech Crunch. I read them both if I get the chance and respect their opinions, but I never really trust the Tech Crunch write-ups of their sponsors. I wish I</p>

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<p>First, thank you for allowing users to provide feedback on this important topic (i.e., vendor funding) before a decision is made. Second, the only reason I subscribe to Idealware is because of its lack of advertising, etc. from vendors. I beg you to be 'unique' and continue on the path traveled by very few. I would welcome an annual membership fee to Idealware than to see vendor funded reports.</p>
<p>So long as there's full disclosure, I don't have a problem with this.</p>
<p>it's tough -- it gets out of the consumer reports world and into one which is similar to most magazines and has advertising. I have to admit -- it would also make me predisposed to like the vendor in question. That takes wonder how many reporters would be involved in researching the softwares and how long the whole process would take; would be very difficult to keep funding information confidential of such nature confidential.</p>
<p>I don't work for a nonprofit so I didn't answer the questions above, but I've done similar work with vendors and they get irked when their money goes towards bad PR. If they come out on bottom you can almost be sure they won't be coming back with more \$\$\$. My final thoughts on your doing this... -It's tempting to make slight changes to a report to make the sponsor look better. -You're a small organization, it sees likely that the author will hear who funded it. One small slip and... -If the vendor does come out on top, NPs will be suspicious (though I expect it, it sounds like the solution is good enough for them to put their wallet where their mouth is- so</p>
<p>I would prefer that you remain independent from companies who you are reviewing, although I would still read the resulting report. Because I work for a nonprofit, I understand the funding issue, but it can become a slippery</p>
<p>The last question should have a neutral option.</p>
<p>I think you can accept vendor money, but be transparent about how you vet vendor funding. What key principles do you uphold in every funded relationship? Idealware should make clear that it relies heavily on vendor services for the reviews, and in promoting effective software selection, that Idealware is in the business of building strong relationships with nonprofits and vendors in order to provide comprehensive review information. To keep things honest, you may want to expose more the advisory groups npo credentials, or reconstitute this to be more of bias oversight role with trusted nonprofit leaders represented.</p>
<p>With no 'not sure' option, I put agree for the 4th question. I'd say that the question of whether I would trust future content would depend on the final analysis of the report content. However, getting vendor money for a report is probably not the best way to ensure objectivity.</p>
<p>This is tricky - but it sounds to me like you have the cart in the right spot - so you can maintain your impartiality. If I could suggest an additional idea - it would be an even more compelling story if you could get SEVERAL of them to sponsor the report. Might be hard to do - but if you were able to maintain your impartiality and get all of them to provide funding - it would be in their best interests and would remove any hint of 'they paid me to say nice things about your software.'</p>
<p>My responses reflect my trust in Laura as an honest person with high integrity and ethics. I know that she would never do anything that wasn't 100% honest.</p>
<p>Vendor funding just brings up questions that should not be there.</p>
<p>Above I pretended I would read a Case Management when in fact I probably wouldn't as we don't do Case Management. I think the Consumer Reports extreme cleanliness is important to its success, even though I disagree with some of their ratings, e.g. their bias against small cars for safety reasons.</p>
<p>The fact that you are thinking this through so carefully makes me trust that you would produce an unbiased report. Have to discuss with the possible funder what happens if their software is terrible or not highly rated? Thanks for your careful approach.</p>
<p>Beware the air of impropriety! You're nice guys, but if you build a bed with the enemy's money, you'll be perceived as being in bed with them. imho</p>
<p>I think it would also help if the vendor that funded it was not given credit on the report itself (a form of advertising). They can be named as a general supporter of Idealware. This is not an issue for me as much as the client to whom I refer to Idealware.</p>
<p>Case management is not relevant to my work to begin with, but thanks for the opportunity for feedback.</p>
<p>Generally, I would be okay with reports underwritten by vendors if your process is as transparent as described</p>
<p>The system you've got worked out there looks good. Good for that vendor is they are up for funding it in such a way. You deserve to make a living for gawdsake! Sounds ok in an imperfect world to me.</p>

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<p>I think Idealware is smart to take this on in a very public and open way. You have to get your funding from somewhere and if the vendor is willing to pay for the report all the better. Any firewalls you can put up between them and the researcher/writer the better.</p>
<p>I have also worked with a market analyst firm as an analyst, so I understand where you're coming from. And because I've been on the vendor side internally (working with analysts) and now assisting both profit & nonprofit organizations with business & marketing activities, I can see the value in having the type of report you're suggesting. Many people don't understand the business of producing this type of research, nor the issues that arise when there is questionable 'pay for play'. Many analyst firms have successfully navigated this treacherous channel - and some have not! If you'd like to briefly discuss this, I'd be happy to help. -Cynthia Holladay email: cholladay@uprightmarketing.com http://www.uprightmarketing.com</p>
<p>Definitely a murky area. Hard to escape the 'appearance' of bias even though there may be none. Similar in some sense to 'soft' money in political campaigns.....</p>
<p>If the vendor is not looking to influence they should give the money to the foundation that supports you.</p>
<p>If a company who is being reviewed and compared against others is funding the entire report, impartiality goes out the window. If all companies being reviewed for all reports agreed to pay the same fee the report would be</p>
<p>If you retain editorial independence that you are happy with, then why not? Someone has to fund research, and if consumers won't, then it only leaves vendors. What I would say is that if the research turns out to be remarkably flattering/positive about the sponsor vendor - EVEN IF these are the actual results - then people may trust it less. But that is beyond anyone's control.</p>
<p>It could well be a 'slippery slope' but that depends on the ethics of the vendor.</p>
<p>Case Management is not an area that is of concern to me, hence the items marked 'Disagree'. However, under the controls that you have described, I don't see a problem with IdealWare receiving funding from a reviewee.</p>
<p>I know funding is though but don't do it. NTEN drank this cool aid and look what it has gotten the sector. JACK SHIT!!!! I know you are impartial and would still trust you under these circumstances but others might not, and it is a slippery slope. I am a vendor and you all rock so keep up the good work with out the blood sucking leaches of the non profit industrial complex on your back.</p>
<p>it would have to be a completely blind fund where there was limited possibility of knowing which vendor was doing the funding.</p>
<p>Since we're not interested in using Case Management software, I probably wouldn't read the articles. If the guidelines stated in question 2 were followed, I wouldn't consider the funding to be a problem.</p>
<p>I have no interest in case management reports, as it does not relate to what my NPO does. So whether you take vendor money for that does not matter for me. Hence the not too helpful response to check boxes above. Though if you took money from an organization or related foundation to write a report on something that interests me/my org as long as it is clearly stated up front that this has been done I would be fine with it. If on the other hand I found out later that your report on email services that recommended we use exchange was funded by MS then I would be annoyed. When I evaluate information for any product I use the vendors information as a source they are TOTALLY biased obviously yet everyone still does it. If a report is sponsored by a vendor it may make me think less of it, but I would still probably use it in my evaluation of some product.</p>
<p>This is no small undertaking, to review 10-20 packages. I suppose that one vendor is in a strong position in the market, and thinks it will benefit from the report. I am strongly inclined toward open source applications, and I would not want to see a report that reviewed only the obscured applications. If it will cover a broad spectrum, I think it would be great; if software decisions can wait long enough for me to see the report, I would use it to make software decisions, either to acquire a particular application or not to acquire any applications at this time.</p>
<p>Bottom line is that everyone has to get paid. Software and hardware magazines regularly take money from very firms for which they review products, do analysis, rate quality, etc. Granted there's a chinese wall between ad sales and editorial, but at a very basic level, it's clear that the firms for which you have maintain your impartiality for objective reporting, pay your bills. Therefore, I would argue that Idealware could take money from said vendors, provided Idealware does the following (1) fully disclose the instance(s) where this funding has taken place (2) add an additional disclaimer in the text of the case study should any particular firm that paid for the report be given a higher grade/standing than a competitive firm and (3) be prepared to change policies if a</p>

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I would think this would not be a fair assessment of any product if written by a vendor. There would not be impartiality here and I feel it would be a mistake for you to undertake this project. If you do go with it, please drop me from your e-mail lists.

If a vendor is willing to provide funding given the scenario, 'They would pay in advance, have no editorial control, and the Idealware writer in charge of recommendations would not know who had funded the work,' they must be quite confident in their product. A potential downside would be that if I read a report that gives strong ratings for one vendor above others and then see that the vendor funded the report, my skepticism is bound to

With the controls you apparently will have in place (payment in advance, no editorial control, writer not aware of who funded the work), it would appear to be a good deal.

If you make clear in the report all that you said here (person making recommendations didn't even know who funded it) that would help. Even saying that, however, should the top ranked candidate TURN OUT to be the entity that funded the report, there would be an unavoidable appearance of conflict of interest.

Thank you for asking. This is a tough issue, but it is also important that you have the money you need to do even better research and trial tests. This requires participation from the vendors whenever possible (technical, at least). I would suggest you set up a 'double-blind' approach where your fund development team solicits all vendors for contributions, not just the one who is offering to finance it. Then you could have the funds to survey existing customers for their satisfaction, as well as assess the technology. Name the funders with an acknowledgement, but keep it secret before the publishing date. In fact, if the fund collection was handled outside your organization, then even better. Solicit in-house, but let an accounting firm publish the names of

Case Management issues don't really apply to our organization.

Laura: given your growing reputation as a trustworthy and thorough source, I don't think you'll have any problems. I'd suggest that you make it clear at the beginning and the end of the review, that the funder had no

We don't manage cases so this would not be of use for us. Other than that, sounds good.