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[TIRR - Reviewer Comments and Summary] [2006]

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Reviewer Scores

	Criteria	Total Possible Score	Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4	Reviewer 5	Reviewer 6	Average
A.	Importance of the Problem	4	4	4	4	4	4	3	4
B.	Responsiveness to an Absolute or Competitive Priority	4	3	4	4	4	4	4	4
C.	Design of Research Activities	35	24	24	22	29	23	21	24
D.	Design of Training Activities	15	15	14	14	15	13	14	14
E.	Design of Dissemination Activities	5	5	5	4	4	5	5	5
F.	Design of TA Activities	4	4	4	4	4	3	4	4
G.	Plan of Operation	6	6	5	5	6	6	6	6
H.	Adequacy and Reasonableness of the Budget	4	4	4	3	3	3	4	4
I.	Plan of Evaluation	10	10	10	10	10	9	8	10
J.	Project Staff	8	8	7	7	7	7	7	7
K.	Adequacy and Accessibility of Resources	5	5	5	5	5	5	5	5
*	Total Score	100	88	86	82	91	82	81	85

Reviewer Comments

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Summary

RRTC Proposal

RRTC on Community Living at ILRU - Abstract

The Rehabilitation Research and Training Center on Community Living at ILRU will conduct the activities listed below to provide target beneficiaries with new knowledge and resources to assist them in systems transformation. The target audience includes policymakers, administrators, practitioners, researchers, individuals with disabilities, advocates, students, and others involved in community living. The RRTC is designed to address the most important research needs in community living. Center training, dissemination, and technical assistance will make findings widely available and will provide other valuable related resources to the field.

1. Analyze and synthesize existing research in independent and community living. RRTC team members will identify state-of-the-science in current research through a comprehensive research review, informing their own work and making available a comprehensive, fully-searchable online catalog of research to the community living field.
2. Create and validate evaluation methods and instruments to enhance effectiveness in fostering independence and full participation. Identified methods and instruments will provide baseline measures for a system of comprehensive program assessments.
3. Create and validate an operational definition of the Olmstead population and develop criteria for use in applying the definition to existing data sets. The definition will provide a more concrete understanding of who is included in the Olmstead population and will support states in documenting effects of efforts to meet their Olmstead obligations.
4. Develop and validate outcome measures to support assessment of program effectiveness and efficiency in fostering independent living, integration, and community participation. Use of these measures will improve the measurement of program outcomes, identify the strengths and weaknesses of current programs in a meaningful way, highlight gaps in the system, and identify differences, if any, in the degree of success for different subpopulations.
5. Document evidence-based practices for assisting individuals to leave institutions or remain in the community, avoiding institutionalization. This research will focus on nursing home transition/diversion programs. Research in this area will support improved outcomes in consumer control, choice, and community integration, as well as an increased understanding of the effect programs have on community integration.
6. Document evidence-based practices to enhance consumer direction in Aging and Disability Resource Centers. Research will support improved outcomes in consumer control, choice, and community integration. This research will help target interventions and improve program effectiveness.
7. Translate findings of research into training, publications, and technical assistance. These activities will make research findings widely available in support of long term care rebalancing efforts and Olmstead implementation.
8. Provide other educational resources on systems transformation to support enduring change in community services.

A| **H133B060017**
Memorial Hermann/TIRR
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**84.133B-14 RRTC on Effective Independent and Community
Living Solutions and Measures**

SUMMARY OF APPLICATION STRENGTHS:

- The involvement of the Cornell University Survey Research Institute
- The definition of the Olmstead population which is founded on the ground-breaking work of McPherson and colleagues in the 1990's which transformed the child health services field established a new cross-condition and service-focused operation definition "children with special health care needs."
- excellent rationale supported by literature review and data for the need of the proposed research and training center
- clearly identified the target population with people with disabilities as the target group
- clearly articulated potential benefits of the proposed research and training activities on target population.
- Exhibit C table proposed activities and how activities relate to the priorities outlined by NIDRR
- clear understanding of policy and service implication related to Olmstead decision and the type of research and training activities are needed to ensure that people with disabilities would be able to avoid nursing home placement and live in the community
- proposed cohesive framework for conducting research using a range of research methodologies that is sustainable, meaningful and appropriate.

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**84.133B-14 RRTC on Effective Independent and Community
Living Solutions and Measures**

SUMMARY OF APPLICATION WEAKNESSES:

- minor concern is that the researchers did not differentiate other stakeholder groups in terms of their relative importance to the proposed activities and services to the R&T center.
- researcher failed to define and reference the major activities in sufficient detail as related to the achievement of the purposes of the priorities (1A to 1E) and 2A and 2B in Exhibit C.
- abstract format submitted by each group of researchers and the literature review included for each research project is minimal and not comprehensive. The quality of review varies somewhat from project to project.
- minimal input from consumers in the design and implementation of training materials and procedures
- key personnel time allocation may not be relative to the proposed activities.
- External evaluator is a good feature but using this person in the manner described does not seem to be cost effective

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PEER REVIEWER COMMENT SHEET

84.133B-14 RRTC on Effective Independent and Community Living Solutions and Measures Program Grant Review

GENERAL INSTRUCTIONS: The selection criteria to be used for evaluating an application under the **84.133B-14 Effective Independent and Community Living Solutions and Measures Program Grant Review** are found in the Application Packet. These criteria are included on the score sheets. The maximum number of points for each criterion is noted on the appropriate page. Please type or print **using blue or black ink only**.

INSTRUCTIONS FOR COMPLETING THE SCORE SHEET

1. Assign a score for each factor in the eleven categories of the criteria.
2. **For each factor**, briefly explain the **Rationale** for the points you assign.
3. **For each criterion**, briefly describe the general **Strengths and Weaknesses** of the application on the sheets provided.
4. **After the panel review**, enter the **Score** in the appropriate boxes on each criterion page and on the final page of the Peer Reviewer Comment Sheet.

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**CRITERION: (A) Importance of the Problem
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant clearly describes the need and target population	2	2
Rationale: The researchers have provided an excellent rationale supported by literature review and data for the need of their proposed research and training center on community living solutions and measures. They discussed the need for integrating funding sources and services provided by multiple federal agencies and how the R&T center can conduct research to help policymakers better define the Olmstead population, to better allocate resources, and to integrate government services. They also clearly identified the target populations, with people with disabilities as the most important target group. A minor concern I have is that the researchers did not differentiate other stakeholder groups in terms of their relative importance to the proposed activities and services of the R&T center.		
(ii) The extent to which the proposed project will have beneficial impact on the target population	2	2
Rationale: The researchers have clearly articulated the potential benefits of the proposed research and training activities on the target populations. The use of the logic model to describe activities and benefits to target group is appropriate and helpful.		

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TOTAL SCORE FOR CRITERION	4	4
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**CRITERION: (B) Responsiveness to an Absolute or Competitive Priority
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant addresses all requirements of the absolute or competitive priority.	2	2
Rationale: Exhibit C provided a table of proposed activities and how these activities will relate to the priorities outlined by NIDRR.		
(ii) The extent to which the applicant's proposed activities are likely to achieve the purposes of the absolute or competitive priority	2	1
Rationale: The researchers identified baseline research projects (1A to 1E) and 2A and 2B and how these activities are targeted to meet the three NIDRR priorities in Exhibit C. However, they failed to define and reference these major activities in sufficient detail as related to the achievement of the purposes of the priorities.		
TOTAL SCORE FOR CRITERION:	4	3

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**CRITERION: (C) Design of Research Activities
(35 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the research activities constitute a coherent, sustained approach to research in the field, including a substantial addition to the state-of-the-art.	6	6
<p>Rationale: The researchers demonstrate a clear understanding of policy and service implication related to Olmstead decision and what kind of research and training activities are needed to ensure that people with disabilities would be able to avoid nursing home placement and live fulfilling lives in the community. They proposed a cohesive framework for conducting research using a range of research methodologies that is sustainable, programmatic, appropriate, and meaningful.</p>		
(ii) The extent to which the methodology of each proposed research activity is meritorious, including consideration of the extent to which --		
(a) The proposed design includes a comprehensive and informed review of the current literature, demonstrating knowledge of the state-of-the-art;	5	3
<p>Rationale: Because of the use of an abstract format submitted by each group of researchers, the literature review included for each research project is minimal and uneven, with quality of the review varies somewhat from project to project. For example, there is little literature review covered in Project 1A. Importantly, although Medline and Ovid have been identified by the researchers, one of the most popular literature search databases, the PsychInfo, was not mentioned; a major oversight for a project proposed to conduct a systematic review of existing research.</p>		
(b) Each research hypothesis is theoretically sound and based on current knowledge;	5	3

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Applicant name: _____

Rationale:

The quality of the research hypotheses are uneven and vary from projects to project. Some projects provided only research questions and others both research questions and hypotheses. I also found some inattention to detail. For example, there is no reason for Project 1A to list its research questions as 9, 10, and 11 (p. 28). Project 1D listed four research questions. However, they stated five hypotheses and not four. Project 2A has two research questions but only one hypothesis. Project 2B has three research questions but only two hypotheses. Many hypotheses are not stated correctly as research hypotheses (neither null hypothesis or directional hypothesis with independent and dependent variables clearly identified in the hypotheses).

FACTORS:

	Max. Points	Score
(c) Each sample population is appropriate and of sufficient size;	5	3
Rationale: Several projects proposed to use secondary data. However, they did not provide any information about the sampling requirements or any a priori power analysis to compute the appropriate sample size for the proposed analyses. Similarly, for the intervention research projects, the researchers did not provide any a priori power analysis to compute the needed sample size for the corresponding statistical analysis to assure sufficient power for the analysis.		
(d) The data collection and measurement techniques are appropriate and likely to be effective; and	5	3

Application Number: _____

Reviewer Code: _____

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Applicant name: _____

Rationale:

Again, the P.I. should insist the principal researchers in each project follow a pre-determined format in writing their proposal including literature review, purpose of the study, research questions/hypotheses, sample/participants, measures, procedures, and data analysis. Because the P.I. did not insist on consistency, there is no consistency from one project to another. Take Project 2A -an example, The data collection and measurement section consists of 10 lines. The principal researcher in that project indicated that one of the key variables is SF-36, without giving any rationale why, whether it is going to be used as a predictor variable or an outcome variable. The principal researcher also did not provide any information regarding the psychometric properties of the Short Form-36, making it difficult to judge the measurement techniques are appropriate or not.

(e) The data analysis methods are appropriate.

5

3

Rationale:

Again, there is no consistency in reporting data analysis procedures. For example, in Project 1D, the researchers indicated that they will conduct a shift-share analysis without providing any technical detail of the procedure. For Project 1E, a data analysis section is not even included in the project.

FACTORS:

Max.

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(iii) The extent to which anticipated research results are likely to satisfy the original hypotheses and could be used for planning additional research, including generation of new hypotheses were applicable

4

3

Rationale:

Given the research hypotheses are not well defined and the statistical analysis used to test the research hypotheses is unclear, unclear about the utility of the research results.

TOTAL SCORE FOR CRITERION

35

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Application Number: _____

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**CRITERION: (D) Design of Training Activities
(15 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the proposed training materials are of sufficient quality, intensity, and duration.	3	3
Rationale: The P.I. indicated that the RRTC will use well established training strategies. It will be helpful if the P.I. will describe those well-established training strategies. However, the RRTC does have a long history of providing training in community living.		
(ii) The extent to which the proposed training content--		
(a) Covers all of the relevant aspects of the subject matter; and	5	5
Rationale: yes		
(b) If relevant, is based on new knowledge derived from research activities of the proposed project.	5	5
Rationale: yes		

FACTORS:

	Max. Points	Score
(iii) The extent to which the proposed training materials and methods are accessible to individuals with disabilities.	2	2

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Rationale:

yes

TOTAL SCORE FOR CRITERION	15	15
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**CRITERION: (E) Design of Dissemination Activities
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the materials to be disseminated are likely to be effective and usable, including consideration of their quality, clarity, variety, and format.	2	2
Rationale: The dissemination strategies are reasonable		
(ii) The extent to which the information to be disseminated will be accessible to individuals with disabilities.	3	3
Rationale: Acceptable		
TOTAL SCORE FOR CRITERION	5	5

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**CRITERION: (F) Design of Technical Assistance Activities
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the methods for providing technical assistance are of sufficient quality, intensity, and duration.	1	1
Rationale: Technical assistance methodology is reasonable.		
(ii) The extent to which the technical assistance is appropriate to the target population, including consideration of the knowledge level of the target population, needs of the target population, and format for providing information.	1	1
Rationale: The P.I. identified several target stakeholders for the research and training product information including consumers, educators, researchers, policymakers, students, etc. However, it is difficult to ascertain whether the information packaged by the RRTC will be designed and customized to the level of research sophistication of the target audience.		
(iii) The extent to which the technical assistance is accessible to individuals with disabilities.	2	2
Rationale: Acceptable		
TOTAL SCORE FOR CRITERION	4	4

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**CRITERION: (G) Plan of Operation
(6 points total)**

FACTORS:

	Max. Points	Score
(i) The adequacy of the plan operation to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, and timelines for accomplishing project tasks.	3	3
<p>Rationale:</p> <p>The P.I. provided a detail plan and the P.I. has extensive experience managing a large project of this kind.</p>		
(ii) The adequacy of the plan of operation to provide for using resources, equipment, and personnel to achieve each objective.	3	3
<p>Rationale:</p> <p>The use of resources etc. is reasonable</p>		
TOTAL SCORE FOR CRITERION	6	6

**CRITERION: (H) Adequacy and Reasonableness of the Budget
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the costs are reasonable in relation to the proposed project activities.	2	2

Application Number: _____

Reviewer Code: _____

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<p>Rationale:</p> <p>The budget to carry out the research and training activities are reasonable.</p>		
<p>(ii) The extent to which the budget for the project, including any subcontracts, is adequately justified to support the proposed project activities.</p>	2	2
<p>Rationale:</p> <p>The justification for subcontracts seems to be reasonable</p>		
TOTAL SCORE FOR CRITERION	4	4

**CRITERION: (I) Plan of Evaluation
(10 points total)**

FACTORS:

	Max. Points	Score
<p>(i) The extent to which the evaluation provides for periodic assessment of progress toward--</p>		
<p>(a) Implementing the plan of operation; and</p>	3	3
<p>Rationale:</p> <p>The plan of evaluation will work better if the P.I. would follow NIDRR's logic model. However, the P.I. provided a reasonable plan of evaluation.</p>		
<p>(b) Achieving the projects intended outcomes and expected impacts.</p>	3	3

Application Number: _____

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Rationale:		
Adequate		
(ii) The extent to which the plan of evaluation provides for periodic assessment of a project's progress that is based on identified performance measures that--		
(a) Are clearly related to the intended outcomes of the project and expected impacts on the target population; and	2	2
Rationale:		
Adequate		

FACTORS:

	Max. Points	Score
(b) Are objective, and quantifiable or qualitative, as appropriate.	2	2
Rationale:		
Adequate		
TOTAL SCORE FOR CRITERION	10	10

Application Number: _____

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**CRITERION: (J) Project Staff
(8 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.	2	2
Rationale: Adequate		
(ii) The extent to which the key personnel and other key staff have appropriate training and experience in disciplines required to conduct all proposed activities.	2	2
Rationale: The P.I is well known in the country for his work in this area.		
(iii) The extent to which the commitment of staff time is adequate to accomplish all the proposed activities of the project.	2	2
Rationale: Adequate		

Application Number: _____

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**CRITERION: (J) Project Staff
(Continued)**

FACTORS:

	Max. Points	Score
(iv) The extent to which the key personnel are knowledgeable about the methodology and literature of pertinent subject areas.	2	2
Rationale: The P.I. and research collaborators appear to have appropriate expertise in their proposed research or training areas.		
TOTAL SCORE FOR CRITERION	8	8

**CRITERION: (K) Adequacy and Accessibility of Resources
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant is committed to provide adequate facilities, equipment, other resources, including administrative support, and laboratories, if appropriate.	3	3
Rationale: Excellent.		
(ii) The extent to which the facilities, equipment, and other resources are appropriately accessible to individuals with disabilities who may use the facilities, equipment, and other resources of the project.	2	2

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Rationale:

Very appropriate

TOTAL SCORE FOR CRITERION	5	5
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A) **H133B060017**
 Memorial Hermann/TIRR
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Reviewer Code: 01

SUMMARY SCORE SHEET

<u>Selection Criteria</u>	<u>Score</u>
A. Importance of the Problem (4 points total)	4
B. Responsiveness to an Absolute or Competitive Priority (4 points total)	3
C. Design of Research Activities (35 points total)	24
D. Design of Training Activities (15 points total)	15
E. Design of Dissemination Activities (5 points total)	5
F. Design of Technical Assistance Activities (4 points total)	4
G. Plan of Operation (6 points total)	6
H. Adequacy and Reasonableness of the Budget (4 points total)	4
I. Plan of Evaluation (10 points total)	10
J. Project Staff (8 points total)	8
K. Adequacy and Accessibility of Resources (5 points total)	9
TOTAL SCORE:	88

Application Number

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PEER REVIEWER COMMENT SHEET

84.133B-14 RRTC on Effective Independent and Community Living Solutions and Measures Program Grant Review

GENERAL INSTRUCTIONS: The selection criteria to be used for evaluating an application under the **84.133B-14 Effective Independent and Community Living Solutions and Measures Program Grant Review** are found in the Application Packet. These criteria are included on the score sheets. The maximum number of points for each criterion is noted on the appropriate page. Please type or print **using blue or black ink only**.

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**CRITERION: (A) Importance of the Problem
 (4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant clearly describes the need and target population	2	2
Rationale: Good review of the Olmstead issues and how they affect consumers.		
(ii) The extent to which the proposed project will have beneficial impact on the target population	2	2
Rationale: Table on P. 11 depicts the projects logic model, and indicates the intended outcomes and long-term goals for the target population		
TOTAL SCORE FOR CRITERION	4	4

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**CRITERION: (B) Responsiveness to an Absolute or Competitive Priority
 (4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant addresses all requirements of the absolute or competitive priority.	2	2
Rationale: One of the priorities of the RFP requires attention to economic utility and cost and benefits. This was not explicit in this section, although it could be embedded in one of the research projects		
(ii) The extent to which the applicant's proposed activities are likely to achieve the purposes of the absolute or competitive priority	2	2
Rationale:		
TOTAL SCORE FOR CRITERION:	4	4

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**CRITERION: (C) Design of Research Activities
(35 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the research activities constitute a coherent, sustained approach to research in the field, including a substantial addition to the state-of-the-art.	6	4
<p>Rationale:</p> <p>The applicant provides an extensive and well documented review of the problems and issues in IL and the Olmstead Act implementation. However, an overall framework for the research projects linked to a conceptual or theoretical model is not provided. The intensity of the research has merit, but the lack of breadth of the research is a deficit.</p>		
(ii) The extent to which the methodology of each proposed research activity is meritorious, including consideration of the extent to which --		
(a) The proposed design includes a comprehensive and informed review of the current literature, demonstrating knowledge of the state-of-the-art;	5	4
<p>Rationale:</p> <p>Uneven quality to the literature reviews for each study; with some (#1) not adequate.</p>		
(b) Each research hypothesis is theoretically sound and based on current knowledge;	5	4

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Rationale:

There are two research areas with 7 projects between the two. Research area #1 is designed to contribute to building a measure of key independent living outcomes. The 2nd area is designed to use the instrument to evaluate two intervention studies. Uneven evidence of attention to research hypotheses – some of the studies have no hypotheses, only research questions.

**CRITERION: (C) Design of Research Activities
 (Continued)**

FACTORS:

	Max. Points	Score
(c) Each sample population is appropriate and of sufficient size;	5	3
<p>Rationale: Sample sizes for the field studies are inadequate – studies lack power analysis, particularly those involving intervention studies. The sample sizes reported are not sufficient so achieve the intended outcomes. Issues regarding sample representativeness are not sufficiently addressed.</p>		
(d) The data collection and measurement techniques are appropriate and likely to be effective; and	5	4

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Rationale:

I don't understand why the instrument that is being developed in 1E is not being tested in the intervention studies? A pilot test was mentioned after cognitive interviewing, but it wasn't clear to me the extent to which this instrument would then be evaluated. Uneven quality on instrumentation throughout each of the studies.

(e) The data analysis methods are appropriate.

5

3

Rationale:

Insufficient information is provided concerning how data will be analyzed. For example, some of the research in Area #1 appears to be meta analysis, but it is not clear how these data will be analyzed. It is unclear how the literature synthesis will be analyzed. General lack of clarity regarding data analysis for the qualitative studies; uneven discussion of data analysis in other studies.

**CRITERION: (C) Design of Research Activities
(Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which anticipated research results are likely to satisfy the original hypotheses and could be used for planning additional research, including generation of new hypotheses were applicable	4	2

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<p>Rationale:</p> <p>The connection between the studies described and the intended outcomes to be achieved as indicated in Table B is weak. The applicant needs to show how each of the studies, as described in this section, relate to the research priorities and the Table. For example, one study concludes that lack of rigorous methodology means that future studies will have to be conducted to address the priorities that were identified.</p>		
TOTAL SCORE FOR CRITERION	35	24

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**CRITERION: (D) Design of Training Activities
 (15 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the proposed training materials are of sufficient quality, intensity, and duration.	3	2
Rationale: Table 3 describes the types of training activities that will occur consistent with the research areas. However, there is limited information in this section regarding how quality will be measured in terms of training materials.		
(ii) The extent to which the proposed training content--		
(a) Covers all of the relevant aspects of the subject matter; and	5	5
Rationale: A framework demonstrating how training materials of the subject matter is provided.		
(b) If relevant, is based on new knowledge derived from research activities of the proposed project.	5	5

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Rationale:

More discussion of the output of the research activities in terms of how they lead to training activities is a problem here.

**CRITERION: (D) Design of Training Activities
 (Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which the proposed training materials and methods are accessible to individuals with disabilities.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	15	14

Applica	H133B060017
	Memorial Hermann/TIRR
Applicant name:	

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**CRITERION: (E) Design of Dissemination Activities
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the materials to be disseminated are likely to be effective and usable, including consideration of their quality, clarity, variety, and format.	2	2
Rationale: Implementation standards for assuring quality are not explained in this section.		
(ii) The extent to which the information to be disseminated will be accessible to individuals with disabilities.	3	3

Applic

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Rationale:

Lack of input from consumers with disabilities

TOTAL SCORE FOR CRITERION

5

5

**CRITERION: (F) Design of Technical Assistance Activities
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the methods for providing technical assistance are of sufficient quality, intensity, and duration.	1	1
Rationale:		
(ii) The extent to which the technical assistance is appropriate to the target population, including consideration of the knowledge level of the target population, needs of the target population, and format for providing information.	1	1

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Rationale:		
(iii) The extent to which the technical assistance is accessible to individuals with disabilities.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	4	4

**CRITERION: (G) Plan of Operation
(6 points total)**

FACTORS:

	Max. Points	Score
(i) The adequacy of the plan operation to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, and timelines for accomplishing project tasks.	3	3
Rationale:		

Applica	H133B060017
	Memorial Hermann/TIRR
Applicant name:	_____

Reviewer Code: 2

(ii) The adequacy of the plan of operation to provide for using resources, equipment, and personnel to achieve each objective.	3	2
<p>Rationale:</p> <p>The table referred to in the appendix does not include responsibilities for each of the tasks. As there are many staff named for various small contributions in this proposal, it is critical to identify who is responsible for what.</p>		
TOTAL SCORE FOR CRITERION	6	5

**CRITERION: (H) Adequacy and Reasonableness of the Budget
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the costs are reasonable in relation to the proposed project activities.	2	2

App. **H133B060017**
 Memorial Hermann/TIRR
 App. _____

Reviewer Code: 2

Rationale:		
(ii) The extent to which the budget for the project, including any subcontracts, is adequately justified to support the proposed project activities.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	4	4

**CRITERION: (I) Plan of Evaluation
 (10 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the evaluation provides for periodic assessment of progress toward--		
(a) Implementing the plan of operation; and	3	3

Applicatio**H133B060017**
 Memorial Hermann/TIRR
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Reviewer Code: 2

Rationale:
 Evaluation plan includes implementation standards and process criteria

(b) Achieving the projects intended outcomes and expected impacts.	3	3
--	---	---

Rationale:

(ii) The extent to which the plan of evaluation provides for periodic assessment of a project's progress that is based on identified performance measures that--

(a) Are clearly related to the intended outcomes of the project and expected impacts on the target population; and	2	2
--	---	---

Rationale:
 Table on p. 102 addresses this aspect

**CRITERION: (I) Plan of Evaluation
 (Continued)**

FACTORS:

	Max. Points	Score
(b) Are objective, and quantifiable or qualitative, as appropriate.	2	2

Application **H133B060017**
 Memorial Hermann/TIRR
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Reviewer Code: 2

Rationale:		
TOTAL SCORE FOR CRITERION	10	10

**CRITERION: (J) Project Staff
 (8 points total)**

FACTORS:

Max.
 Points Score

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H133B060017
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(i) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.	2	2
Rationale:		
(2ii) The extent to which the key personnel and other key staff have appropriate training and experience in disciplines required to conduct all proposed activities.	2	2
Rationale:		
(iii) The extent to which the commitment of staff time is adequate to accomplish all the proposed activities of the project.	2	1
Rationale: The PI is only 20% time – other key staff have very small time commitments to this RRTC raising concerns about whether proposed activities can be implemented.		

**CRITERION: (J) Project Staff
 (Continued)**

FACTORS:

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Applic	H133B060017
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Applic	

Reviewer Code: 2

	Points	Score
(iv) The extent to which the key personnel are knowledgeable about the methodology and literature of pertinent subject areas.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	8	7

**CRITERION: (K) Adequacy and Accessibility of Resources
(5 points total)**

FACTORS:

Max.

App: **H133B060017**
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 App: _____

Reviewer Code: 2

	Points	Score
(i) The extent to which the applicant is committed to provide adequate facilities, equipment, other resources, including administrative support, and laboratories, if appropriate.	3	3
Rationale:		
(ii) The extent to which the facilities, equipment, and other resources are appropriately accessible to individuals with disabilities who may use the facilities, equipment, and other resources of the project.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	5	5

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H133B060017

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Reviewer Code: 2**SUMMARY SCORE SHEET**

<u>Selection Criteria</u>	<u>Score</u>
A. Importance of the Problem (4 points total)	4
B. Responsiveness to an Absolute or Competitive Priority (4 points total)	4
C. Design of Research Activities (35 points total)	24
D. Design of Training Activities (15 points total)	14
E. Design of Dissemination Activities (5 points total)	5
F. Design of Technical Assistance Activities (4 points total)	4
G. Plan of Operation (6 points total)	5
H. Adequacy and Reasonableness of the Budget (4 points total)	4
I. Plan of Evaluation (10 points total)	10
J. Project Staff (8 points total)	7
K. Adequacy and Accessibility of Resources (5 points total)	5
TOTAL SCORE:	86

App: **H133B060017**
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Reviewer Code: 3

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PEER REVIEWER COMMENT SHEET

84.133B-14 RRTC on Effective Independent and Community Living Solutions and Measures Program Grant Review

GENERAL INSTRUCTIONS: The selection criteria to be used for evaluating an application under the **84.133B-14 Effective Independent and Community Living Solutions and Measures Program Grant Review** are found in the Application Packet. These criteria are included on the score sheets. The maximum number of points for each criterion is noted on the appropriate page. Please type or print **using blue or black ink only.**

INSTRUCTIONS FOR COMPLETING THE SCORE SHEET

1. Assign a score for each factor in the eleven categories of the criteria.
2. **For each factor**, briefly explain the **Rationale** for the points you assign.
3. **For each criterion**, briefly describe the general **Strengths and Weaknesses** of the application on the sheets provided.
4. **After the panel review**, enter the **Score** in the appropriate boxes on each criterion page and on the final page of the Peer Reviewer Comment Sheet.

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Reviewer Code: _____

**CRITERION: (A) Importance of the Problem
 (4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant clearly describes the need and target population	2	2
Rationale: The need of better measures of needs and program outcomes is well articulated as are the problems of data that is overly abundant by not in means that can be digested. The issue of "who is Olmstead appropriate" is a legitimate question but this is not clarified until the subsequent section. The target audiences are clearly stated.		
(ii) The extent to which the proposed project will have beneficial impact on the target population	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	4	4

Application Number: _____

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Applicant name: _____

**CRITERION: (B) Responsiveness to an Absolute or Competitive Priority
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant addresses all requirements of the absolute or competitive priority.	2	2
Rationale: The applicant does this in depth.		
(ii) The extent to which the applicant's proposed activities are likely to achieve the purposes of the absolute or competitive priority	2	2
Rationale: They do a good job of explaining the challenges that they face. Whether their activities will allow them to overcome these is less clear.		
TOTAL SCORE FOR CRITERION:	4	4

Appl# H133B060017 Memorial Hermann/TIRR Applicant name: _____
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**CRITERION: (C) Design of Research Activities
(35 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the research activities constitute a coherent, sustained approach to research in the field, including a substantial addition to the state-of-the-art.	6	5
Rationale: The overall thrust of activities in this proposal appears to be coherent and it will provide a substantial addition to the state of the art – a void currently existing. The projects are not all adequately highlighted to see whether any are tangential to the basic theme.		
(ii) The extent to which the methodology of each proposed research activity is meritorious, including consideration of the extent to which --		
(a) The proposed design includes a comprehensive and informed review of the current literature, demonstrating knowledge of the state-of-the-art;	5	3
Rationale: The authors seem to know the large databases that are insufficiently used in rehabilitation research quite well. It is not clear that they know the measures traditionally used in rehabilitation. For instance, the instrument to be refined in study 1E is a “black box” – no indication given that it takes advantage of the extensive work done in the field.		
(b) Each research hypothesis is theoretically sound and based on current knowledge;	5	3
Rationale: Only 3 of 8 studies are amenable to hypotheses. The hypothesis for study 2A is not based on any literature highlighted in the study. Similarly, the hypotheses for study 2B are disjoint both from what is discussed in the literature and from what will be assessed in the study.		

Appli **H133B060017**

Memorial Hermann/TIRR

Applicant name: _____

Reviewer Code: _____

**CRITERION: (C) Design of Research Activities
(Continued)**

FACTORS:

	Max. Points	Score
(c) Each sample population is appropriate and of sufficient size;	5	3
<p>Rationale: For most studies the sample sizes are either quite large or the analysis formats allow for small sample styles. Study 2A is a different matter and it is unclear if the sample is large enough but its size has not been adequately justified. The authors essentially say that they are testing the entire population (of two CILs) and that the effect size is unknown and thus power calculation is not necessary. It is not necessary given that the sample=population, but the two CILs are themselves simply a sample of CILs in general (they do wish to draw inference in this study) and as for the lack of knowledge of effect size, the authors should find a means to estimate.</p>		
(d) The data collection and measurement techniques are appropriate and likely to be effective; and	5	2
<p>Rationale: * 1E The methodology for constructing a measure of community integration/participation is at best unclear. There is no indication of what is included in the NCD-based instrument to date; many instruments exist that have good attributes. The methods discussed to enhance this measure, while including some good procedures, bottom-line do not include essential reliability and validity activities.³ * 2A It is stated that "three composite scores will be created" using the same the same basic questionnaire, throwing in items from other standardized instruments such as the SF-36. How this will be done (in a valid way in particular) is never suggested. * 2E The discussions of IL Philosophy should be interesting but it is dubious that claims can be made that definitive definitions will result.</p>		
(e) The data analysis methods are appropriate.	5	3
<p>Rationale: * Study 1C, the authors will "identify the variables w/i the MDS that correspond to the stated criteria and the develop estimates of the # of individuals . . ." There is no explanation of the methods that they will use for identifying variables or calculating parameters here or when extending this process to include variables for the non-institutionalized subjects. This is very important since the resulting algorithms get used elsewhere. * Study 2A. The 1st analysis is a comparison of difference in outcomes between 2 time-points based on % change. There is no explanation about statistical tests, but most will be problematic because of abnormalities of distribution, or lowly powered if non-parametrics are chosen. Plans to address a 2nd research question are not at all clear and no plan is provided to address the study hypothesis.</p>		

App **H133B060017**
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 App: _____

Reviewer Code: _____

**CRITERION: (C) Design of Research Activities
 (Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which anticipated research results are likely to satisfy the original hypotheses and could be used for planning additional research, including generation of new hypotheses were applicable	4	3
Rationale: The study will not provide nearly what the authors suggest. While it might be very helpful in terms of creating a measure of participation, the new measure will may well not be reliable or valid. The work from studies 1A – 1B will be helpful with future projects, in a sense 1B more than 1A because seemingly it will be more readily usable – ACCESS seemingly not being a great vehicle for the 1A product. 2A lacks a measure at the present. 1D has real promise to provide new insights, depending upon how adequate the databases indeed are.		
TOTAL SCORE FOR CRITERION	35	22

Ap **H133B060017**
 Memorial Hermann/TIRR
 Applicant Name: _____

Reviewer Code: _____

**CRITERION: (D) Design of Training Activities
 (15 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the proposed training materials are of sufficient quality, intensity, and duration.	3	2
Rationale: Materials are not broad enough in their target audiences. Seemingly little is accessible to a non-professional audience. Additionally, NIDRR had desired that training involve student training, which is not included in this proposal. This is largely a dissemination plan (with the addition of on-line distance leaning course).		
(ii) The extent to which the proposed training content--		
(a) Covers all of the relevant aspects of the subject matter; and	5	5
Rationale:		
(b) If relevant, is based on new knowledge derived from research activities of the proposed project.	5	5
Rationale:		

Appli	H133B060017
	Memorial Hermann/TIRR
Applicant name: _____	

Reviewer Code: _____

**CRITERION: (D) Design of Training Activities
(Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which the proposed training materials and methods are accessible to individuals with disabilities.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	15	14

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Reviewer Code: _____

**CRITERION: (E) Design of Dissemination Activities
 (5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the materials to be disseminated are likely to be effective and usable, including consideration of their quality, clarity, variety, and format.	2	1
Rationale: As with the training activity materials, the dissemination materials, almost exhaustively the same, are not formatted in a way that is targeted to non-professional consumers.		
(ii) The extent to which the information to be disseminated will be accessible to individuals with disabilities.	3	3
Rationale:		
TOTAL SCORE FOR CRITERION	5	4

App
H133B060017
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**CRITERION: (F) Design of Technical Assistance Activities
 (4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the methods for providing technical assistance are of sufficient quality, intensity, and duration.	1	1
Rationale: Good. Nice variety.		
(ii) The extent to which the technical assistance is appropriate to the target population, including consideration of the knowledge level of the target population, needs of the target population, and format for providing information.	1	1
Rationale:		
(iii) The extent to which the technical assistance is accessible to individuals with disabilities.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	4	4

App: **H133B060017**
 Memorial Hermann/TIRR
 Appl: _____

Reviewer Code: _____

**CRITERION: (G) Plan of Operation
 (6 points total)**

FACTORS:

	Max. Points	Score
(i) The adequacy of the plan operation to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, and timelines for accomplishing project tasks.	3	3
Rationale: There is a lot of administrative time built into this study plan. Whether it is all necessary is unclear, but it should be ample. There are no stand-out problems.		
(ii) The adequacy of the plan of operation to provide for using resources, equipment, and personnel to achieve each objective.	3	2
Rationale: The proposal explains the adequacy of the resources available at each institution. They do appear to be adequate. While the institutions have adequate resources the focus is on the institutions not on the project, or even on how the project will directly benefit from these ample institutional resources.		
TOTAL SCORE FOR CRITERION	6	5

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H133B060017

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**CRITERION: (H) Adequacy and Reasonableness of the Budget
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the costs are reasonable in relation to the proposed project activities.	2	2
Rationale:		
(ii) The extent to which the budget for the project, including any subcontracts, is adequately justified to support the proposed project activities.	2	1
Rationale: It seems like the TIRR portion of the funds are high considering the small amount of research conducted there and the fact that dissemination / training activities emanate from the individual research projects. Conversely, this is an issue of whether the subcontractors have enough budgetary resources to compete the proposed work.		
TOTAL SCORE FOR CRITERION	4	3

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H133B060017

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**CRITERION: (I) Plan of Evaluation
(10 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the evaluation provides for periodic assessment of progress toward--		
(a) Implementing the plan of operation; and	3	3
Rationale:		
(b) Achieving the projects intended outcomes and expected impacts.	3	3
Rationale:		
Good to have an external evaluator in conjunction w/ PI and discussion of integrating team across sites along with expert panel. The use of this an evaluator to do work at this level of detail is very expensive and could be done with other means – overseen by an EE.		
(ii) The extent to which the plan of evaluation provides for periodic assessment of a project's progress that is based on identified performance measures that--		
(a) Are clearly related to the intended outcomes of the project and expected impacts on the target population; and	2	2
Rationale:		

App **H133B060017**
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 App _____

Reviewer Code: _____

**CRITERION: (I) Plan of Evaluation
 (Continued)**

FACTORS:

	Max. Points	Score
(b) Are objective, and quantifiable or qualitative, as appropriate.	2	2
Rationale: Table H is good. There could have been some additional outcomes, e.g. some assessment of satisfaction with Projects from Studies 1A and 1B		
TOTAL SCORE FOR CRITERION	10	10

Appl **H133B060017**
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Reviewer Code: _____

**CRITERION: (J) Project Staff
 (8 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.	2	2
Rationale:		
(ii) The extent to which the key personnel and other key staff have appropriate training and experience in disciplines required to conduct all proposed activities.	2	2
Rationale: Dr. Gulley, who is the Research Director for UMMS where the bulk of the research is being completed, is less than a year out of school. He does have some seasoned people supporting him.		
(iii) The extent to which the commitment of staff time is adequate to accomplish all the proposed activities of the project.	2	2
Rationale:		

App
H133B060017
 Memorial Hermann/TIRR
 App

Reviewer Code: _____

**CRITERION: (J) Project Staff
 (Continued)**

FACTORS:

	Max. Points	Score
(iv) The extent to which the key personnel are knowledgeable about the methodology and literature of pertinent subject areas.	2	1
Rationale: The team has strong backgrounds in disability policy which is essential. It is not clear if they have an adequate background in measurement.		
TOTAL SCORE FOR CRITERION	8	7

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H133B060017

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**CRITERION: (K) Adequacy and Accessibility of Resources
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant is committed to provide adequate facilities, equipment, other resources, including administrative support, and laboratories, if appropriate.	3	3
Rationale:		
(ii) The extent to which the facilities, equipment, and other resources are appropriately accessible to individuals with disabilities who may use the facilities, equipment, and other resources of the project.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	5	5

App **H133B060017**
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SUMMARY SCORE SHEET

<u>Selection Criteria</u>	<u>Score</u>
A. Importance of the Problem (4 points total)	4
B. Responsiveness to an Absolute or Competitive Priority (4 points total)	4
C. Design of Research Activities (35 points total)	22
D. Design of Training Activities (15 points total)	14
E. Design of Dissemination Activities (5 points total)	4
F. Design of Technical Assistance Activities (4 points total)	4
G. Plan of Operation (6 points total)	5
H. Adequacy and Reasonableness of the Budget (4 points total)	3
I. Plan of Evaluation (10 points total)	10
J. Project Staff (8 points total)	7
K. Adequacy and Accessibility of Resources (5 points total)	5
TOTAL SCORE:	82

Application Number: H133B060017

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Applicant name: Memorial Hermann/TIRR

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PEER REVIEWER COMMENT SHEET

84.133B-14 RRTC on Effective Independent and Community Living Solutions and Measures Program Grant Review

GENERAL INSTRUCTIONS: The selection criteria to be used for evaluating an application under the **84.133B-14 Effective Independent and Community Living Solutions and Measures Program Grant Review** are found in the Application Packet. These criteria are included on the score sheets. The maximum number of points for each criterion is noted on the appropriate page. Please type or print **using blue or black ink only.**

INSTRUCTIONS FOR COMPLETING THE SCORE SHEET

1. Assign a score for each factor in the eleven categories of the criteria.
2. **For each factor**, briefly explain the **Rationale** for the points you assign.
3. **For each criterion**, briefly describe the general **Strengths and Weaknesses** of the application on the sheets provided.
4. **After the panel review**, enter the **Score** in the appropriate boxes on each criterion page and on the final page of the Peer Reviewer Comment Sheet.

Application Number: H133B060017

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (A) Importance of the Problem
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant clearly describes the need and target population	2	2
Rationale: The applicant described the statement of need and description of the target population clearly and well.		
(ii) The extent to which the proposed project will have beneficial impact on the target population	2	2
Rationale: Providing target beneficiaries with new knowledge and resources to assist them in long-term care systems transformation, as the applicant proposes, will have a major beneficial impact on this group.		
TOTAL SCORE FOR CRITERION	4	4

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (B) Responsiveness to an Absolute or Competitive Priority
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant addresses all requirements of the absolute or competitive priority.	2	2
Rationale: The applicant's proposed research, training and dissemination activities address all priority requirements. With respect to the research portfolio, Priority a) "Enhance participation..." is addressed by research projects 1A, 1B, 1C, 1D, 1E, 2A and 2B. Priority b) "Improve intervention approaches to remove or reduce barriers..." is addressed by research projects 1A, 1C, 1D, 2A and 2B. Priority c) "Improve understanding about the economic utility of existing or proposed policies..." is addressed by research projects 1A, 1B, 1C, 1D, and 1E.		
(ii) The extent to which the applicant's proposed activities are likely to achieve the purposes of the absolute or competitive priority	2	2
Rationale: The applicant anticipates that confusion and uncertainty will increase among policy makers and program administrators, and also among consumers and family members, as old LTC systems disappear and new community-based systems of services and supports emerge. The applicant's proposed activities will provide evidence-based research and analysis to help the target beneficiaries handle this transition more effectively. These efforts are likely to achieve the purposes of the priority.		
TOTAL SCORE FOR CRITERION:	4	4

Application Number: H133B060017

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (C) Design of Research Activities
(35 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the research activities constitute a coherent, sustained approach to research in the field, including a substantial addition to the state-of-the-art.	6	6
Rationale: The proposed research activities constitute a developmental approach. Activities begin with efforts to achieve definitional clarity with respect to the Olmstead population and to other critical variables (e.g., measuring "diversion" or "induced demand"); move forward to examine the effectiveness of specific interventions; and then develop evaluation approaches, which are methodologically sound, cross-disability, and based on standardized measures of outputs and outcomes. These tools and approaches will be disseminated to states and other stakeholders as part of the applicant's training, dissemination and technical assistance activities. The seven research projects while distinct are complementary, and they not only share data and measures, but also share research team members. The result is a research portfolio, which represents a coherent, sustained approach to disability research, and a substantial addition to the state of the art.		
(ii) The extent to which the methodology of each proposed research activity is meritorious, including consideration of the extent to which --		
(a) The proposed design includes a comprehensive and informed review of the current literature, demonstrating knowledge of the state-of-the-art;	5	4
Rationale: The design of the proposal overall is informed by a comprehensive and informed review of the current literature, although some projects lacked robust literature reviews relative to their research questions.		
(b) Each research hypothesis is theoretically sound and based on current knowledge;	5	4
Rationale: There was unevenness in the degree to which the research hypothesis were theoretically sound and current.		

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (C) Design of Research Activities
(Continued)**

FACTORS:

	Max. Points	Score
(c) Each sample population is appropriate and of sufficient size;	5	4
Rationale: There was unevenness in the degree to which the sample populations across the research projects were appropriate and of sufficient size. Sample size decisions rested mainly on considerations about representativeness and coping with potential loss-to-follow up.		
(d) The data collection and measurement techniques are appropriate and likely to be effective; and	5	4
Rationale: The applicant proposes to use a variety of data collection and measurement techniques, both qualitative and quantitative. While the applicant provided information about the sources of data (whether primary or secondary), there was unevenness in how much detail was included. The applicant will work with the Survey Research Institute at Cornell on some survey research activities.		
(e) The data analysis methods are appropriate.	5	4
Rationale: Each project description included information about the proposed data analysis methods but some important technical issues, particularly around measurement, were not consistently addressed.		

Application Number: H133B060017

Reviewer Code: 4

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**CRITERION: (C) Design of Research Activities
(Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which anticipated research results are likely to satisfy the original hypotheses and could be used for planning additional research, including generation of new hypotheses were applicable	4	3
Rationale: This research has the potential to transform how LTC services are provided nationwide. One proposed activity, for example, aims to develop a criteria-based definition of the Olmstead population which is founded on the ground-breaking work of McPherson and colleagues in the 1990s which transformed the child health services field by establishing a new cross-condition, service-focused operation definition - "children with special health care needs." Concerns about various aspects of the proposed research portfolio, however, may prevent the applicant from satisfying the original hypotheses.		
TOTAL SCORE FOR CRITERION	35	29

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (D) Design of Training Activities
(15 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the proposed training materials are of sufficient quality, intensity, and duration.	3	3
Rationale: ILRU is responsible for the project's training, dissemination and technical assistance activities. The audience for these activities is LTC decision-makers: 1) policy makers and program administrators making decisions for groups, and 2) consumers and family members considering personal decisions. The applicant will make deliberate efforts to include people with disabilities who are minority group members. The applicant has extensive experience conducting training in independent and community living, and provided very detailed information about the training activities, including materials.		
(ii) The extent to which the proposed training content--		
(a) Covers all of the relevant aspects of the subject matter; and	5	5
Rationale: Training activities are central to the goals of this project: to provide decision-makers with tools and strategies that are evidence-based. The research activities all include dimensions related to training, and these are described in detail. Additional training activities will address cross-cutting issues.		
(b) If relevant, is based on new knowledge derived from research activities of the proposed project.	5	5
Rationale: Training activities are central to the goals of this project: to provide decision-makers with tools and strategies that are evidence-based. The research activities all include dimensions related to training, and these are described in detail. Additional training activities will address cross-cutting issues.		

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (D) Design of Training Activities
(Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which the proposed training materials and methods are accessible to individuals with disabilities.	2	2
Rationale: All training materials and methods will be accessible to people with disabilities, an important target audience for this project.		
TOTAL SCORE FOR CRITERION	15	15

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (E) Design of Dissemination Activities
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the materials to be disseminated are likely to be effective and usable, including consideration of their quality, clarity, variety, and format.	2	1
Rationale: The planned dissemination activities are designed to augment the training activities. The applicant will disseminate research findings via a "comprehensive online data base of current research" on the project, with user-friendly features; an online course; policy briefs; articles in peer reviewed journals; and a quarterly newsletter. Dissemination activities appear to be focused on a professional audience, and it is not clear how much will be made available for consumers and families.		
(ii) The extent to which the information to be disseminated will be accessible to individuals with disabilities.	3	3
Rationale: All materials will be fully accessible to individuals with disabilities. The applicant provided detailed information about the various options and noted its role in pioneering fully accessible online distance learning courses in the independent living field. Web-based activities will comply with accessibility standards.		
TOTAL SCORE FOR CRITERION	5	4

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (F) Design of Technical Assistance Activities
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the methods for providing technical assistance are of sufficient quality, intensity, and duration.	1	1
Rationale: Technical assistance will be available via telephone, on demand, and via web-based video conferences, written materials, and on-location meetings as scheduled. These activities will take place through the grant period.		
(ii) The extent to which the technical assistance is appropriate to the target population, including consideration of the knowledge level of the target population, needs of the target population, and format for providing information.	1	1
Rationale:		
(iii) The extent to which the technical assistance is accessible to individuals with disabilities.	2	2
Rationale: The technical assistance will be fully accessible to people with disabilities.		
TOTAL SCORE FOR CRITERION	4	4

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (G) Plan of Operation
(6 points total)**

FACTORS:

	Max. Points	Score
(i) The adequacy of the plan operation to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, and timelines for accomplishing project tasks.	3	3
Rationale: The applicant presents a detailed management plan, which is specifically designed to meet the management needs of a multi-site project, using a "community of practice" model. The plan calls for a management team and includes clearly defined responsibilities, and timelines for accomplishing project tasks. The management team will be advised by an expert panel, constituted following the tenets of PAR.		
(ii) The adequacy of the plan of operation to provide for using resources, equipment, and personnel to achieve each objective.	3	3
Rationale:		
TOTAL SCORE FOR CRITERION	6	6

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (H) Adequacy and Reasonableness of the Budget
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the costs are reasonable in relation to the proposed project activities.	2	2
Rationale:		
(ii) The extent to which the budget for the project, including any subcontracts, is adequately justified to support the proposed project activities.	2	1
Rationale: The PIs are responsible for major research activities as well as extensive training activities. It is not clear if the % FTE allocated for the PIs, is sufficient given their proposed responsibilities.		
TOTAL SCORE FOR CRITERION	4	3

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (I) Plan of Evaluation
(10 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the evaluation provides for periodic assessment of progress toward--		
(a) Implementing the plan of operation; and	3	3
Rationale: The applicant has allocated funds for an external evaluator. The proposal included a detailed plan of evaluation.		
(b) Achieving the projects intended outcomes and expected impacts.	3	3
Rationale:		
(ii) The extent to which the plan of evaluation provides for periodic assessment of a project's progress that is based on identified performance measures that--		
(a) Are clearly related to the intended outcomes of the project and expected impacts on the target population; and	2	2
Rationale: The applicant provided performance measures that were directly related to the intended outcomes of the project and the expected impacts on the target population.		

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (I) Plan of Evaluation
(Continued)**

FACTORS:

	Max. Points	Score
(b) Are objective, and quantifiable or qualitative, as appropriate.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	10	10

Application Number: H133B060017

Reviewer Code: 4

Place Label Here

Applicant name: Memorial Hermann/TIRR

**CRITERION: (J) Project Staff
(8 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.	2	2
Rationale: The applicant has a solid track record of employing persons who are members of traditionally underrepresented groups, including people with disabilities.		
(ii) The extent to which the key personnel and other key staff have appropriate training and experience in disciplines required to conduct all proposed activities.	2	2
Rationale: The key personnel on this project have both training and extensive experience in this area.		
(iii) The extent to which the commitment of staff time is adequate to accomplish all the proposed activities of the project.	2	1

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

Rationale: As noted, it's not clear if all PIs have been allocated sufficient time to accomplish all the proposed activities; in addition to their research activities, they are also expected to be involved in training.

**CRITERION: (J) Project Staff
(Continued)**

FACTORS:

	Max. Points	Score
(iv) The extent to which the key personnel are knowledgeable about the methodology and literature of pertinent subject areas.	2	2
Rationale: Key personnel are extremely knowledgeable about the methodology and literature of pertinent subject areas.		
TOTAL SCORE FOR CRITERION	8	7

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

**CRITERION: (K) Adequacy and Accessibility of Resources
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant is committed to provide adequate facilities, equipment, other resources, including administrative support, and laboratories, if appropriate.	3	3
Rationale:		
(ii) The extent to which the facilities, equipment, and other resources are appropriately accessible to individuals with disabilities who may use the facilities, equipment, and other resources of the project.	2	2
Rationale:		

Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

TOTAL SCORE FOR CRITERION	5	5
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Application Number: H133B060017

Reviewer Code: 4

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Applicant name: Memorial Hermann/TIRR

SUMMARY SCORE SHEET

<u>Selection Criteria</u>	<u>Score</u>
A. Importance of the Problem (4 points total)	4
B. Responsiveness to an Absolute or Competitive Priority (4 points total)	4
C. Design of Research Activities (35 points total)	29
D. Design of Training Activities (15 points total)	15
E. Design of Dissemination Activities (5 points total)	4
F. Design of Technical Assistance Activities (4 points total)	4
G. Plan of Operation (6 points total)	6
H. Adequacy and Reasonableness of the Budget (4 points total)	3
I. Plan of Evaluation (10 points total)	10
J. Project Staff (8 points total)	7
K. Adequacy and Accessibility of Resources (5 points total)	5
TOTAL SCORE:	91

Application Number: HB 133B 0600017

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Applicant name: Memorial Herman

Reviewer Code: 5

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PEER REVIEWER COMMENT SHEET

84.133B-14 RRTC on Effective Independent and Community Living Solutions and Measures Program Grant Review

GENERAL INSTRUCTIONS: The selection criteria to be used for evaluating an application under the 84.133B-14 Effective Independent and Community Living Solutions and Measures Program Grant Review are found in the Application Packet. These criteria are included on the score sheets. The maximum number of points for each criterion is noted on the appropriate page. Please type or print **using blue or black ink only.**

INSTRUCTIONS FOR COMPLETING THE SCORE SHEET

1. Assign a score for each factor in the eleven categories of the criteria.
2. For each factor, briefly explain the **Rationale** for the points you assign.
3. For each criterion, briefly describe the general **Strengths and Weaknesses** of the application on the sheets provided.
4. After the panel review, enter the **Score** in the appropriate boxes on each criterion page and on the final page of the Peer Reviewer Comment Sheet.

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (A) Importance of the Problem
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant clearly describes the need and target population	2	2
Rationale: Application provides Did not differentiate other relevant stakeholders to benefit.		
(ii) The extent to which the proposed project will have beneficial impact on the target population	2	2
Rationale: The application clearly describes this and provides a logic model.		
TOTAL SCORE FOR CRITERION	4	4

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (B) Responsiveness to an Absolute or Competitive Priority
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant addresses all requirements of the absolute or competitive priority.	2	2
Rationale: A clear discussion is summarized in a table presented in the application.		
(ii) The extent to which the applicant's proposed activities are likely to achieve the purposes of the absolute or competitive priority	2	2
Rationale: The application details the flow of program activities proposed to address the priority, but more detail to accomplish these priorities would strengthen this section.		
TOTAL SCORE FOR CRITERION:	4	4

Application Number: HB 133B 0600017

Reviewer Code: 5

Place Label Here

Applicant name: Memorial Herman

**CRITERION: (C) Design of Research Activities
(35 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the research activities constitute a coherent, sustained approach to research in the field, including a substantial addition to the state-of-the-art.	6	5
Rationale: The proposed Center is grounded in theory and describes relevant policies that may affect the implementation of Center activities. The research methods are varied and have rigor, but more information on potential covariates would be useful to this section.		
(ii) The extent to which the methodology of each proposed research activity is meritorious, including consideration of the extent to which --		
(a) The proposed design includes a comprehensive and informed review of the current literature, demonstrating knowledge of the state-of-the-art;	5	4
Rationale: The application has an abstract format and more information in project-by-project summaries could strengthen this section. Other databases and resources may be useful here, but are not discussed.		
(b) Each research hypothesis is theoretically sound and based on current knowledge;	5	3
Rationale: The application lists research questions, but does not always includes testable hypotheses for all projects. The statement of these hypotheses should be clarified.		

	Max. Points	Score
(c) Each sample population is appropriate and of sufficient size;	5	3

Application Number: HB 133B 0600017

Reviewer Code: 5

Place Label Here

Applicant name: Memorial Herman

<p>Rationale:</p> <p>The samples could be larger in order to ensure attrition will not affect the evaluation of outcomes. While some projects include secondary data, more detail for those with samples should be included, with appropriate power analyses, and information to ensure the sample are representative.</p>		
(d) The data collection and measurement techniques are appropriate and likely to be effective; and	5	3
<p>Rationale:</p> <p>Overall, the information provided on this section could include more detail for specific sections. Not all of the projects provide the details necessary or are inconsistent, such as project R2A, but also in other projects as well. Details also should address psychometrics related to the instrumentation. As well, more information about the selection criteria and representativeness in samples, for example, R1E's pilot test, would be useful.</p>		
(e) The data analysis methods are appropriate.	5	3
<p>Rationale:</p> <p>The types of data analyses are presented. However, little details regarding the technical aspects of data analyses and strategies are provided to afford evaluation of the merits of this section.</p>		

**CRITERION: (C) Design of Research Activities
(Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which anticipated research results are likely to satisfy the original hypotheses and could be used for planning additional research, including generation of new hypotheses were applicable	4	2
<p>Rationale:</p> <p>It is unclear that this can be accomplished, given the inconsistent nature of the hypotheses, as well as the lack of information related to the statistical evaluation strategies.</p>		
TOTAL SCORE FOR CRITERION	35	23

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (D) Design of Training Activities
(15 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the proposed training materials are of sufficient quality, intensity, and duration.	3	2
<p>Rationale:</p> <p>The application's training plan includes multiple methods, but little information about the strategies to be used is provided. The scope of these activities should be further explored and methods to ensure quality and capacity of training programs should be described.</p>		
(ii) The extent to which the proposed training content--		
(a) Covers all of the relevant aspects of the subject matter; and	5	5
<p>Rationale:</p>		
(b) If relevant, is based on new knowledge derived from research activities of the proposed project.	5	4
<p>Rationale:</p> <p>It is not clear that the training agenda, as proposed, will benefit from findings of the research. In addition, without consistent information about the goals of the research and expected outcomes – perhaps draw from the hypotheses – it is not clear that the training agenda will benefit from new knowledge from the research projects.</p>		

**CRITERION: (D) Design of Training Activities
(Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which the proposed training materials and methods are accessible to individuals with disabilities.	2	2

Application Number: HB 133B 0600017

Reviewer Code: 5

Place Label Here

Applicant name: Memorial Herman

Rationale:

TOTAL SCORE FOR CRITERION

15

13

Application Number: HB 133B 0600017

Reviewer Code: 5

Place Label Here

Applicant name: Memorial Herman

**CRITERION: (E) Design of Dissemination Activities
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the materials to be disseminated are likely to be effective and usable, including consideration of their quality, clarity, variety, and format.	2	2
Rationale: The application considers several strategies for dissemination.		
(ii) The extent to which the information to be disseminated will be accessible to individuals with disabilities.	3	3
Rationale: The dissemination plan for people with disabilities is multifaceted.		
TOTAL SCORE FOR CRITERION	5	5

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (F) Design of Technical Assistance Activities
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the methods for providing technical assistance are of sufficient quality, intensity, and duration.	1	1
<p>Rationale:</p> <p>The application states the strong commitment to technical assistance; one concern is whether the technical assistance strategies are too academic in focus.</p>		
(ii) The extent to which the technical assistance is appropriate to the target population, including consideration of the knowledge level of the target population, needs of the target population, and format for providing information.	1	0
<p>Rationale:</p> <p>The TA plans include attention to knowledge, needs, and the format of materials. More information on role of consumers would strengthen this section.</p>		
(iii) The extent to which the technical assistance is accessible to individuals with disabilities.	2	2
<p>Rationale:</p> <p>Detailed plans to develop accessible materials and methodologies for delivering them are provided.</p>		
TOTAL SCORE FOR CRITERION	4	3

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (G) Plan of Operation
(6 points total)**

FACTORS:

	Max. Points	Score
(i) The adequacy of the plan operation to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, and timelines for accomplishing project tasks.	3	3
Rationale: The management plan describes Center operations.		
(ii) The adequacy of the plan of operation to provide for using resources, equipment, and personnel to achieve each objective.	3	3
Rationale: Details are provided to ensure that Center operations are coordinated and take advantage of state-of-the-science resources, methodologies, and techniques. Collaborators and other project consultants also will contribute to these activities.		
TOTAL SCORE FOR CRITERION	6	6

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (H) Adequacy and Reasonableness of the Budget
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the costs are reasonable in relation to the proposed project activities.	2	2
Rationale: The budget appears appropriate and is commensurate with Center activities and operations.		
(ii) The extent to which the budget for the project, including any subcontracts, is adequately justified to support the proposed project activities.	2	1
Rationale: Overall, the financial plans for the Center are appropriate given the nature of the proposed activities. One minor concern is whether there is ample personnel time devoted to all of the research and training endeavors slated in this proposal – listing personnel time in aggregate is difficult to evaluate. It also is unclear whether senior staff time, e.g., Mr. Frieden @ 1% on the research projects, will be appropriate to ensure success of the projects. On p. 94, it is not clear that the proportion of the funds devoted to research (60%) vs. other activities (31%) is clear. Funds support personnel and other activities related to these areas, not the singular activities of research and or training etc. only (e.g., subject reimbursement, software, instruments, etc.)		
TOTAL SCORE FOR CRITERION	4	3

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (I) Plan of Evaluation
(10 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the evaluation provides for periodic assessment of progress toward--		
(a) Implementing the plan of operation; and	3	2
Rationale: More details related to the evaluation activities would be beneficial. More details also should be provided regarding the role and engagement of consumers for the participatory action processes of the grant.		
(b) Achieving the projects intended outcomes and expected impacts.	3	3
Rationale: Primary and secondary outcomes are to be monitored as part of Center's evaluation plan. These include traditional indicators, particularly formative and summative reviews with NIDRR. These are summarized, but more detail on the exact strategies to track some of these milestones would strengthen the section.		
(ii) The extent to which the plan of evaluation provides for periodic assessment of a project's progress that is based on identified performance measures that--		
(a) Are clearly related to the intended outcomes of the project and expected impacts on the target population; and	2	2
Rationale: Overall, the application proposes an integrated plan for affecting change among the target population. More detail, or a brief summary of potential strategies to accomplish this would add to the strength of the section.		

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (I) Plan of Evaluation
(Continued)**

FACTORS:

	Max. Points	Score
(b) Are objective, and quantifiable or qualitative, as appropriate.	2	2
Rationale: An indicator-outcome framework is used to define the indicators. These are summarized by project, and include particular components. One potential weakness is in what ways novel or innovative methods or modalities may be required to accomplish these goals for the Center.		
TOTAL SCORE FOR CRITERION	10	9

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (J) Project Staff
(8 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.	2	2
Rationale: The Center proposes a culturally diverse staff.		
(ii) The extent to which the key personnel and other key staff have appropriate training and experience in disciplines required to conduct all proposed activities.	2	2
Rationale: The personnel for the proposed Center have demonstrated expertise and experience in the field. They also have experience running large-scale projects with multiple components. The Center staff should be well-equipped to accomplish the proposal's workplan. It also is unclear what Dr. Robin Clark's role will be in the Center's proposed workplan as he is not included in the project descriptions of budgets, but a biographical sketch is in the appendix.		
(iii) The extent to which the commitment of staff time is adequate to accomplish all the proposed activities of the project.	2	1
Rationale: Unclear what roles of consumers and other stakeholders will be in execution of Center activities.		

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

**CRITERION: (J) Project Staff
(Continued)**

FACTORS:

	Max. Points	Score
(iv) The extent to which the key personnel are knowledgeable about the methodology and literature of pertinent subject areas.	2	2
Rationale: All proposed staff have demonstrated experience with the literature and skills in methodologies relevant to the projects to which they are assigned.		
TOTAL SCORE FOR CRITERION	8	7

Application Number: HB 133B 0600017

Reviewer Code: 5

Place Label Here

Applicant name: Memorial Herman

**CRITERION: (K) Adequacy and Accessibility of Resources
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant is committed to provide adequate facilities, equipment, other resources, including administrative support, and laboratories, if appropriate.	3	3
Rationale: There is ample institutional support and contribution to this project.		
(ii) The extent to which the facilities, equipment, and other resources are appropriately accessible to individuals with disabilities who may use the facilities, equipment, and other resources of the project.	2	2
Rationale: The application provides specific details regarding the capacities of the host organization, the Center, and its collaborators.		
TOTAL SCORE FOR CRITERION	5	5

Application Number: HB 133B 0600017

Reviewer Code: 5

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Applicant name: Memorial Herman

SUMMARY SCORE SHEET

<u>Selection Criteria</u>	<u>Score</u>
A. Importance of the Problem (4 points total)	4
B. Responsiveness to an Absolute or Competitive Priority (4 points total)	4
C. Design of Research Activities (35 points total)	23
D. Design of Training Activities (15 points total)	13
E. Design of Dissemination Activities (5 points total)	5
F. Design of Technical Assistance Activities (4 points total)	3
G. Plan of Operation (6 points total)	6
H. Adequacy and Reasonableness of the Budget (4 points total)	3
I. Plan of Evaluation (10 points total)	9
J. Project Staff (8 points total)	7
K. Adequacy and Accessibility of Resources (5 points total)	5
TOTAL SCORE:	82

Application Number: _____
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Applicant name: _____

Reviewer Code: 6

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PEER REVIEWER COMMENT SHEET

84.133B-14 RRTC on Effective Independent and Community Living Solutions and Measures Program Grant Review

GENERAL INSTRUCTIONS: The selection criteria to be used for evaluating an application under the **84.133B-14 Effective Independent and Community Living Solutions and Measures Program Grant Review** are found in the Application Packet. These criteria are included on the score sheets. The maximum number of points for each criterion is noted on the appropriate page. Please type or print **using blue or black ink only.**

INSTRUCTIONS FOR COMPLETING THE SCORE SHEET

1. Assign a score for each factor in the eleven categories of the criteria.
2. **For each factor**, briefly explain the **Rationale** for the points you assign.
3. **For each criterion**, briefly describe the general **Strengths and Weaknesses** of the application on the sheets provided.
4. **After the panel review**, enter the **Score** in the appropriate boxes on each criterion page and on the final page of the Peer Reviewer Comment Sheet.

Application Number

H133B060017

Memorial Hermann/TIRR

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Reviewer Code: E

**CRITERION: (A) Importance of the Problem
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant clearly describes the need and target population	2	2
<p>Rationale: Authors make a good argument that there is a "pressing scientific and public policy need to know <i>who</i> the Olmstead population is, and <i>who</i> it is not." (p 6). Further, they point out that the types of outcomes that are typically measured in current research and program evaluation (policy analysis) do not adequately measure <i>participation and integration</i> in the community (i.e., the intent of Olmstead) (p. 6). Thus, there is a need for new metrics to "assess the value added by home- and community-based services" such as social capital, participation in family and community life, and to evaluate Olmstead valued services and outcomes achieved "cross-disabilities" (p.7). That is, there is a "pressing need for critical synthesis and analysis of existing knowledge and data in the HCBS field." (p. 7).</p> <p>The applicant also points out the need to study initiatives and strategies for (1) nursing home diversion and transition from institution to community and to investigate the effectiveness of (2) transition programs operated by CIL and outreach and coordination services offered by Aging and Disability Resourced Centers (ADRC).</p>		
(ii) The extent to which the proposed project will have beneficial impact on the target population	2	1
<p>Rationale: Target audiences include: practitioners (service providers), policymakers, government agencies, researchers, educators, advocates, individuals with disabilities, students, others. While the outcomes of the project clearly can be used to by all target audiences (including practitioners and IWD) the project, as a whole, appears to be designed more with policy makers and researchers in mind. This is not a bad thing in and of itself, however, some additional "outreach" to ensure that practitioners and IWD are aware of, and that they are encouraged/empowered to use the products of the Center would strengthen the project. That is, more targeted outreach to these groups would have made the proposal stronger.</p>		

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H133B060017
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TOTAL SCORE FOR CRITERION	4	3

H133B060017
 Memorial Hermann/TIRR

Reviewer Code: E

**CRITERION: (B) Responsiveness to an Absolute or Competitive Priority
 (4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant addresses all requirements of the absolute or competitive priority.	2	2
Rationale: The applicant describes 7 different components which systematically address the requirements of the absolute priorities of the competition. Exhibit C (pp 12-13) display the design.		
(ii) The extent to which the applicant's proposed activities are likely to achieve the purposes of the absolute or competitive priority	2	2
Rationale: The applicant proposes to extend knowledge (and improve services/outcomes) in at least two significant ways. First, by defining the "Olmstead population" extant data on services and outcomes can be analyzed in a way that focuses more directly on the population in question. Second, and more interestingly, the applicant proposes to develop new measures of "environmental accommodation" which would allow researchers, policy-makers, practitioners, and IWD better assess achievement of the overarching goals of Olmstead (i.e., integration and participation in the community) by moving beyond the individual to the environment. As the author says on p. 16, "placement and integration may be two very different things."		
TOTAL SCORE FOR CRITERION:	4	4

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Reviewer Code: E

**CRITERION: (C) Design of Research Activities
 (35 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the research activities constitute a coherent, sustained approach to research in the field, including a substantial addition to the state-of-the-art.	6	4
<p>Rationale: The research projects described address both individuals who are diverted from- and transitioned from nursing homes and institutions (p. 22). These projects build nicely upon one another- going from review of current practice- to developing a single definition for the cross-disability Olmstead population- to developing measurement systems that incorporate assessment of not only individual but physical, economic and other environmental variables- to investigations of major approaches to nursing home/institution transition and diversion. Unfortunately, none of the studies described actually involve manipulations of the (environmental) variables that will be included in the new measurement systems. This omission diminishes the potential contribution of the proposal for making "substantial additions to the state-of-the-art."</p>		

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Reviewer Code: E

(ii) The extent to which the methodology of each proposed research activity is meritorious, including consideration of the extent to which –		
(a) The proposed design includes a comprehensive and informed review of the current literature, demonstrating knowledge of the state-of-the-art;	5	2

Rationale: A literature review for the overall “policy context” (pp 24-26) of the proposal is provided but there is little specific literature review for each of the seven individual projects.

Project 1A (Systematic review of existing research and relevant information) is conducted in two phases. The first is a “broad based search of academic lit., agency publications, and information from state documents- to identify strategies for measuring effectiveness of supports/services” (p. 28). The second includes three systematic reviews on research questions which specifically address the outcomes experienced by the “Olmstead population”. The authors rightly mention that these topics are likely to be important features of quality assessment of HCBS/Olmstead population services and outcomes. However, the literature review for this project (1A) does not include or even allude to such topics as ecologically based assessment, social capital, social network, natural support, measurement of integration or participation. Of course space limitations preclude detailed review of all of these literatures- but at least some mention of them seems warranted.

Project 1B (Methods for the Rigorous Evaluation of HCBS Initiatives) – see comments for 1A.
 Project 1C (Develop operational definition of Olmstead Population)- No literature review
 Project 1D (Analysis of Disability Population Institutionalized or at Risk of Institutionalization since Olmstead)- no literature review.
 Project 1E-Testing and Refinement of Community Integration and Participation Indicators- no lit review.

Intervention study 2A (Application of Olmstead operational definition to individuals served by nursing home diversion/transition programs operated by CIL in two states). No lit review.
 Intervention study 2B (Consumer choice and control for individuals served by Aging and Disability Resourced Centers). No lit review.

(b) Each research hypothesis is theoretically sound and based on current knowledge;	5	3
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Rationale: The Hypotheses presented were actually questions not hypotheses. However, projects 1A-E were not experimental in nature, so it was appropriate to use research/evaluation questions in lieu of hypotheses. The quality of project's research questions varied. For example, project 1A (p 28) presented research questions that were appropriate.

a) How is Olmstead pop defined & measured and what are its service needs?
 b) How does the lit conceptualize key IL concepts (e.g., control, choice, cmty integration)?
 c) Are definitions and concepts applied differently for persons with severe physical disabilities compared with persons with serious mental illness?

Research questions for project 1B were extensive and less well developed. As a result, the reader is less informed about the specific focus of the project.

Research questions for 1C (pp. 33-34), like 1A, were well described and identified the focus of the project.

Project 1D had both research questions and hypotheses. However, there did not appear to be a direct relationship between them. As a result, the reader was left feeling that the project's focus may not be clearly defined.

Project 1E did not present specific research questions or hypotheses. The reader was left to "intuit" the specific questions/hypotheses.

Intervention study 2A hypothesis (p50) was acceptable. It posits that individuals who qualify under the new Olmstead definition who receive transition services will report lower levels of satisfaction on key variables in their first month than those who are diverted- but will have similar levels of satisfaction in both groups after one year.

Study 2B hypotheses are not written with enough specificity to clearly identify how the hypotheses are being tested. In the first case (p58) the hypothesis does not specify what is being measured to determine if ADRCs differ- or how "strength of IL philosophy" will be operationalized.

**CRITERION: (C) Design of Research Activities
 (Continued)**

FACTORS:

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(c) Each sample population is appropriate and of sufficient size;	5	4
<p>Rationale: Descriptions of samples, or decision rules for inclusion, (e.g., data based) of articles or documents were not included for Projects 1A-E. Estimated sample sizes were not provided for projects- except 1E. In 1E, authors provide rationale for number of questions participants will be asked (i.e., to reduce burden) but did not provide rationale for the numbers of participants to be included in some components. For example, (p.47) "20 beneficiaries randomly selected from a program service a population similar to those studied under subsequent RRTC projects..." No explanation of why this number was selected.</p> <p>For study 2A, Exhibit D (p 52) illustrates how the authors came up with their estimate of participants. The estimate seems reasonable. Although, I do think that their proposed practice of "telling" potential participants that they will be included unless they respond seems a bit coercive- and will result in subsequent rejections- once they are, in fact contacted (p 53). Thus, I believe that their estimated sample size is probably an overestimate.</p> <p>The sample of ARDC to be reviewed in Study 2B is all 43 funded ARDC. Project staff will have access to them via TA provided to them by the ILRU.</p>		
(d) The data collection and measurement techniques are appropriate and likely to be effective; and	5	3
Rationale: Lack of description of psychometric properties of the measurement tools to be used.		
(e) The data analysis methods are appropriate.	5	3
<p>Rationale: While the author states that "established principals of systematic literature reviews" (p 29) will be used- Projects 1A & B would have benefited from some description of the criteria that the authors intend to apply to the lit. review.</p> <p>Study 2A does not provide detail on the proposed analyses (e.g., "the average of each of 3 composite scores at follow-up for the diversion group will be compared to the average of each of the composite scores of the transition group" [55]). Some description of the likely procedures (e.g., chi-square) and rationale for selecting such methods should have been provided.</p> <p>Study 2B is a qualitative study. Nvivo software will be used and case studies will be prepared. However, the authors do not provide an adequate description of the analysis procedures they intend to use.</p>		

Application Number: _____
H133B060017
 Memorial Hermann/TIRR

Reviewer Code: _____

**CRITERION: (C) Design of Research Activities
 (Continued)**

FACTORS:

	Max. Points	Score
(iii) The extent to which anticipated research results are likely to satisfy the original hypotheses and could be used for planning additional research, including generation of new hypotheses were applicable	4	2
Rationale: Because hypotheses and analytic procedures are not adequately described, it is not possible to assess the full potential of the proposed projects.		
TOTAL SCORE FOR CRITERION	35	21

**CRITERION: (D) Design of Training Activities
 (15 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the proposed training materials are of sufficient quality, intensity, and duration.	3	2
Rationale: Certainly the wide array of approaches to getting information to target audiences provides a variety of modes for stakeholders to participate. Quality and intensity seem appropriate. However, the intensity and frequency of opportunities to participate in some modes is low (e.g., "...will present findings in a conference presentation; one Web cast and streaming media podcast;...one virtual policy forum;...one cross-agency, state-to-state roundtable presentation and discussion (p. 64).”		
(ii) The extent to which the proposed training content--		
(a) Covers all of the relevant aspects of the subject matter; and	5	5

App:-----
H133B060017
 Memorial Hermann/TIRR
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Reviewer Code: E

Rationale: Well designed and multiple venues for stakeholders to receive training.		
(b) If relevant, is based on new knowledge derived from research activities of the proposed project.	5	5
Rationale: New knowledge relevant to the field covered (e.g., definition of Olmstead population, instrument for measuring achievement of Olmstead goals (integration/participation in community), comparisons of diversion and transition outcomes and approaches).		

(iii) The extent to which the proposed training materials and methods are accessible to individuals with disabilities.	2	2
Rationale: Accessibility of training appears to be a strength- particularly the electronic/on-line materials		
TOTAL SCORE FOR CRITERION	15	14

**CRITERION: (E) Design of Dissemination Activities
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the materials to be disseminated are likely to be effective and usable, including consideration of their quality, clarity, variety, and format.	2	2
Rationale:		

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H133B060017
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(ii) The extent to which the information to be disseminated will be accessible to individuals with disabilities.	3	3
Rationale: The proposed center has many individuals with disabilities on the project- utilizes a advisory Network that also provides the perspective of IWD. The website and products to be disseminated are fully accessible. (see p 81). The two "intervention" projects work directly with entities that serve- and generally are heavily comprised of IWD.		
TOTAL SCORE FOR CRITERION	5	5

**CRITERION: (F) Design of Technical Assistance Activities
 (4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the methods for providing technical assistance are of sufficient quality, intensity, and duration.	1	1
Rationale: Phone, Web-based video conferencing, web and print materials, on-site (pp82-83).		
(ii) The extent to which the technical assistance is appropriate to the target population, including consideration of the knowledge level of the target population, needs of the target population, and format for providing information.	1	1
Rationale: The wide array of approaches to providing TA ensure that methods appropriate for nearly all potential consumers available.		
(iii) The extent to which the technical assistance is accessible to individuals with disabilities.	2	2

App	H133B060017
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Rationale: see p 86

TOTAL SCORE FOR CRITERION

4

4

**CRITERION: (G) Plan of Operation
(6 points total)**

FACTORS:

	Max. Points	Score
(i) The adequacy of the plan operation to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, and timelines for accomplishing project tasks.	3	3
Rationale:		
(ii) The adequacy of the plan of operation to provide for using resources, equipment, and personnel to achieve each objective.	3	3
Rationale:		
TOTAL SCORE FOR CRITERION	6	6

**CRITERION: (H) Adequacy and Reasonableness of the Budget
(4 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the costs are reasonable in relation to the proposed project activities.	2	2
Rationale: Collaborating Universities have complimentary (funded) projects which provide resources/efficiencies (p. 93)		

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(ii) The extent to which the budget for the project, including any subcontracts, is adequately justified to support the proposed project activities.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	4	4

**CRITERION: (I) Plan of Evaluation
(10 points total)**

FACTORS:

Max.
Points Score

(i) The extent to which the evaluation provides for periodic assessment of progress toward--		
(a) Implementing the plan of operation; and	3	3
Rationale:		
(b) Achieving the projects intended outcomes and expected impacts.	3	1
Rationale: Plan calls for relying on External Evaluator too much. For example, External Evaluator is responsible for "...ensure data are collected in a complete and timely manner...and data are entered into appropriate data bases (p 99)		
(ii) The extent to which the plan of evaluation provides for periodic assessment of a project's progress that is based on identified performance measures that--		
(a) Are clearly related to the intended outcomes of the project and expected impacts on the target population; and	2	2
Rationale: See logic model		

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**CRITERION: (I) Plan of Evaluation
(Continued)**

FACTORS:

	Max. Points	Score
(b) Are objective, and quantifiable or qualitative, as appropriate.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	10	8

**CRITERION: (J) Project Staff
(8 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.	2	2
Rationale: Many project staff have disabilities		
(ii) The extent to which the key personnel and other key staff have appropriate training and experience in disciplines required to conduct all proposed activities.	2	2

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Rationale:

(iii) The extent to which the commitment of staff time is adequate to accomplish all the proposed activities of the project.	2	1
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Rationale: Highly capable/well qualified staff. However, the individual who will function basically as the project coordinator (Mr. Petty) is only .40 FTE. Seems like a full-time person will be needed to coordinate across all three collaborating Universities.

(iv) The extent to which the key personnel are knowledgeable about the methodology and literature of pertinent subject areas.	2	2
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Rationale:

TOTAL SCORE FOR CRITERION	8	7
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**CRITERION: (K) Adequacy and Accessibility of Resources
(5 points total)**

FACTORS:

	Max. Points	Score
(i) The extent to which the applicant is committed to provide adequate facilities, equipment, other resources, including administrative support, and laboratories, if appropriate.	3	3

App	H133B060017
	Memorial Hermann/TIRR
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Rationale:		
(ii) The extent to which the facilities, equipment, and other resources are appropriately accessible to individuals with disabilities who may use the facilities, equipment, and other resources of the project.	2	2
Rationale:		
TOTAL SCORE FOR CRITERION	5	5

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SUMMARY SCORE SHEET

<u>Selection Criteria</u>	<u>Score</u>
A. Importance of the Problem (4 points total)	3
B. Responsiveness to an Absolute or Competitive Priority (4 points total)	4
C. Design of Research Activities (35 points total)	21
D. Design of Training Activities (15 points total)	14
E. Design of Dissemination Activities (5 points total)	5
F. Design of Technical Assistance Activities (4 points total)	4
G. Plan of Operation (6 points total)	6
H. Adequacy and Reasonableness of the Budget (4 points total)	4
I. Plan of Evaluation (10 points total)	8
J. Project Staff (8 points total)	7
K. Adequacy and Accessibility of Resources (5 points total)	5
TOTAL SCORE:	81