



# Brady Education Foundation



**Existing Program Evaluation  
Proposal Review Criteria**  
*Updated November 1, 2018*

**DISQUALIFIED APPLICATIONS**

**Proposals that meet any of the following criteria will NOT be reviewed by the Full Board of the Brady Education Foundation:**

- Application is inconsistent with Foundation policies (policies posted on website)
  - Project is outside the US
  - Evaluation agency is a for-profit company
  - Program to be evaluated is for-profit
  - PI not a researcher (e.g., is a development officer)
  - Proposal is not run through the PI’s home institution
- Missing responses to questions in the application (Sections 1-6) or missing any required attachments (Section 7)
- The proposed project dates are not within the range for the application cycle (see dates on website).
  - Rare exceptions can be made when a compelling case is articulated; rationale to be provided in cover letter and in application (Section 5: question 4)
- The specific aims are outside the mission of the Foundation (Section 2: questions 2 and 3)
- Budget (Section 6; budget justification)
  - Missing information (e.g., salaries, FTEs; subcontracts)
  - Missing or incomplete budget justification
  - Indirect costs included are higher than 10% for primary institution or one or more subcontract
  - The primary institution charges indirect costs on one or more subcontracts
  - One or more salary is above the salary cap (see Budget instructions in application)
  - Conference support request is inconsistent with the Foundation’s policy (see Budget instructions in application)
  - Budget includes funding for scholarships, capital expenses, scaling up program, or continuing education (GRA tuition is allowed when appropriately justified)
- Project time-line with benchmarks (Section 7: required attachment)
  - Missing or incomplete
  - Is over 3-page limit
- CVs / resumes of key personnel (Section 7: required attachment)
  - Missing for one or more key personnel
  - One or more is over the 3-page limit
  - One or more does not include information requested (see instruction in application)
- Letters of support from partnering organizations (Section 7: required attachment)
  - Missing for one or more partnering organizations
  - One or more does not include information requested (see instruction in application)
- Proof of tax exempt status (Section 7: required attachment)
  - Missing for primary institution
  - Missing for one or more partnering institutions

**APPLICATIONS REVIEWED BY THE FULL BOARD:**

**General Review Information**

- Each specific criterion (see below) is rated on a 5-point scale; higher scores indicate higher criteria strength. Reviewers consider strengths and weaknesses within each criterion when scoring.

score	descriptor
1	Poor
2	Fair
3	Good
4	Excellent
5	Outstanding



# Brady Education Foundation



- A reviewer's final recommendation concerning the overall potential impact of the proposal (and thus the opinion on whether to invite or fund depending on the Stage level) is not necessarily based on the average of the criterion scores. For example, a reviewer may give only moderate scores to some of the review criteria but still recommend inviting/funding because one criterion critically important to the project is rated highly; or a reviewer could give mostly high criterion ratings but still not recommend inviting/funding because one criterion critically important to the project being proposed is not highly rated. An application does not need to be strong in all categories to be judged likely to have major impact.

## Review Criteria Categories

- Importance and Collaboration
  - Aims and fit with BEF Mission
  - Impact Potential and Dissemination Plans
  - Rationale (need for the program and need for this particular evaluation)
  - Collaboration
- Budget
- Program to be Evaluated
  - Program Factors
  - Target Population
  - Feasibility of implementation from practitioner / service provider perspective
  - Accessibility from perspective of potential participants / target population
  - Affordability and Sustainability
  - Strength-Based Orientation
- Research / Evaluation Criteria
  - Research / Evaluation Design and Methodology
    - Design
    - Intended sample (size, recruitment, maintenance, demographics)
    - Outcomes data and data sources
    - Analytic plan
  - Qualifications of Research / Evaluation Team and Environment
    - Research Environment
    - Expertise of the PI / Research Team
      - in topic area and population
      - in evaluation methods
      - Pilot work/prior experience with specific study procedures

## Detailed Information Concerning Review Criteria

Below, the factors considered when scoring each of the criteria are described. The questions in the application most pertinent to each criterion are provided; however, responses throughout the application may be considered when scoring each criterion as well.

### Importance and Collaboration Criteria:

- *Aims of the Project and Fit with BEF Mission:*
  - Factors considered when scoring this criterion include what is/are the specific aim(s) of the proposed project (including primary aims of evaluating effectiveness as well as any secondary aims concerning possible mediators, moderators or cost-benefit analyses), clarity of the aim(s), and the goodness of fit of the aim(s) with the mission of the Foundation of supporting projects that have the potential to help close the opportunity / achievement gap for children (birth through 18 years) from underserved groups and/or low-resourced communities (minority ethnic groups, low-income families). (Section 2: questions 2 and 3; Section 1: questions 7 and 8 also considered if other current or potential funding partners exist and /or whether the proposed evaluation is part of a larger project)



# Brady Education Foundation



- **Impact potential and Dissemination Plans:**
  - Factors considered when scoring this criterion include potential dissemination products (e.g., solid contribution to lists such as the “What Works Clearing House” at the US Department of Education’s Institute of Education Sciences, likelihood of publications in quality journals), what “next steps” results from the proposed project might inform (e.g., providing pilot data that might lead to further program development and/or larger evaluation study), and the potential impact for the results from the project to inform programmatic funding decisions by private foundations and/or public policy / public funding decisions. (Section 2: questions 5 and 6)
- **Rationale (need for the program and need for this particular evaluation):**
  - Factors considered when scoring this criterion include the extent to which compelling rationale is provided to justify the aim(s) of the proposed project, clarity of the overall Theory of Change guiding the proposed project and how *this specific project* fits within it, and the strength of the empirical literature supporting the aim(s) of the proposed project; both the need for this program in helping to close the opportunity / achievement gaps as well as the need for this specific evaluation are considered. (Section 3: questions 2, 4 and 5)
- **Collaboration:**
  - Scoring of this criterion is based on the extent to which the program to be evaluated was originally developed via a prior collaboration between researchers and practitioners, and the extent to which the proposed project reflects strong collaboration between the research / evaluation team and practitioners / service providers (and other community stakeholders as appropriate such as parents / families, economists, policy makers, other community members, etc.) throughout the proposed project (e.g., developing questions, recruitment, data collection, analyses and interpretation, dissemination). (Section 2: question 4)

## Budget Criteria:

- **Budget:** Scoring for this criterion is based on the extent to which budget is in line with specific aims / scope of work proposed and is reasonable and justified (Section 1: questions 5-9; Section 6: budget; Section 7: budget justification)  
Factors considered include:
  - the total budget amount requested; whether all activities proposed are represented in the budget; whether unjustified costs are included; the extent to which the FTE percent requested for each key personnel is reasonable given his/her role and responsibilities (i.e., is neither too high nor too low); and the extent to which estimates for supplies, equipment and other costs (e.g., incentives for participants, costs for assessment materials) are reasonable given the scope of work proposed
  - whether other support for the project has been secured and/or pending
  - whether operational funding for the program to be evaluated has been secured for the period during which the evaluation would occur (the Foundation favors projects for which operational funding for the program is already secured so that funding from the Foundation is used only for evaluation activities)

## Program to be Evaluated Criteria:

- **Program Factors:**
  - Scoring of this criterion is based on the extent to which the program to be evaluated is likely to make a meaningful impact on closing the opportunity / achievement gap. Factors considered include the intended goals of the program and the activities participants engage in to achieve these goals, the duration / intensity of the program, and the methods the program uses to reach and enroll potential program participants. (Section 3: question 3)
- **Target Population:**
  - Factors considered when scoring this criterion include the extent to which the program to be evaluated is focused on underserved groups and/or low-resourced communities (minority ethnic groups, low-income families); the percentage of children from underserved groups and/or low-resourced communities that would be included in the sample. (Section 3: question 3h)



# Brady Education Foundation

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- *Feasibility of implementation from practitioner / service provider perspective:*
  - Scoring of this criterion is based on the strength of the evidence provided concerning how well the program to be evaluated has been implemented in the “real world”, considering the opportunities and challenges faced by practitioners and service providers serving under-resourced and under-represented communities, and the likelihood it could be scaled up across a variety of setting / communities. (Section 3: question 6)
- *Accessibility from perspective of potential participants*
  - Scoring of this criterion is based on the strength of the evidence provided concerning how well the target population can access the program, considering both barriers to and incentives for program participation (i.e., extent to which barriers have been identified and addressed, and extent to which potential participants view the program as useful), particularly for individuals and families living in under-resourced and under-represented communities. As applicable, consider factors such as environmental, logistical (e.g., transportation, scheduling), geographic, demographic, economic, cultural, or other factors related to this program’s unique situation. (Section 3: question 7)
- *Affordability and Sustainability:*
  - Affordability refers to the both the start-up costs required to initiate a program as well as the on-going operational costs of a program, weighing costs to potential benefits. Sustainability in this regard refers to the extent to which sources of those costs can be identified (i.e., “financial stakeholders”). Scoring of this criterion is based on the strength of the evidence provided concerning the affordability and sustainability of the program to be evaluated (Section 3: question 8)
- *Strength-Based Orientation:*
  - Scoring of this criterion is based on the extent to which the program to be evaluated is grounded in a strength-based approach (rather than a deficit-based model), identifying specific strengths individuals and families bring that the program builds upon. Factors considered when scoring include the extent to which the program considers the specific and unique needs, challenges and strengths of children from underserved groups and/or low-resourced communities, while also recognizing the variability that exists within under-served populations in terms of needs, challenges and strengths (recognizing that one-size does not necessarily fit all). (Section 3: question 9)

## Research / Evaluation criteria:

- *Research / Evaluation Design and Methodology:* The extent to which the design / methodology of the proposed project will provide high quality data that will inform the specific aim(s). (Section 4: questions 2-7; Section 7: time-line with benchmarks)

Each of the following aspects is scored separately:

- *Design:*
  - Scoring for this criterion is based both on the clarity and the rigor of the evaluation design. In general, RCTs are considered more rigorous than comparison group designs, and comparison group designs are considered more rigorous than pre-post designs that only include program participants. Further:
    - For RCTs, scoring is also based on the clarity of the descriptions of the treatment and groups (e.g., activities) and the clarity of the description of how and when randomization will take place.
    - For comparison group designs, scoring is also based on rationale for not conducting a RCT and the extent to which possible confounding variables (e.g., due to selection bias) are identified and will be controlled for.
    - For pre-post designs that only include program participants, scoring is also based on rationale for conducting neither a RCT nor a comparison group design and the proposed evidence that will be used to determine program effectiveness.



# Brady Education Foundation

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- *Intended Sample (size, recruitment, maintenance, demographics):*
  - Scoring for this criterion is based on the extent to which the sample size is judged to be appropriate for all aims of the proposed project including both main effect and moderation research questions (if applicable), and the extent to which the intended demographic characteristics are consistent with aims of study. Sample sizes should be supported by power analyses where appropriate. Also considered is whether recruitment procedures (and retention over-time if appropriate) are likely to recruit (and maintain) a sample representative of the intended population in sufficient numbers to conduct the proposed project. Further:
    - For RCTs, also considered when scoring this criterion are the sample sizes for each treatment and control group at the level of randomization and the strength of the evidence provided that the sample size will be large enough to detect meaningful effects (e.g., power analyses, data analytic plan).
    - For comparison group designs, also considered when scoring this criterion are the sample sizes for each group and the strength of the evidence provided that the sample size will be large enough to detect meaningful effects (e.g., power analyses, data analytic plan) as well as the strength of the evidence provided that the sample size is large enough to control for potential confounding variables.
  
- *Outcomes data and data sources:*
  - Scoring for this criterion is based on whether the proposed data to be collected is consistent with the aims of the proposed project and the extent to which outcome measures are consistent with the goals of the program including procedures to assess student achievement if the ultimate goal of the program is to increase student achievement. Considered are the purpose of the data to be collected (e.g., to assess child outcomes), the methods used to collect data (e.g., direct assessment, parent-report, administrative data), and the strength of the evidence provided concerning the psychometric properties of the methods proposed (i.e., reliable, valid for the target population). If sources for data include administrative data sets or other existing data sets currently managed by other parties, be sure to attach the data sharing agreements to the application (Section 7, required attachment)
  
- *Analytic Plan:*
  - Scoring for this criterion is based on the level to which the analyses for each specific aim of the proposed project are clearly articulated and appropriate.
  
- *Qualifications of Research / Evaluation Team and Environment:* Extent to which the research / evaluation team has a demonstrated record that provides confidence in their ability to do the project, and the extent to which the PI's research environment can support the proposed project. Each of the following aspects is scored separately:
  - *Research Environment:*
    - Scoring for this criterion is based on the strength of the evidence provided concerning the level of support the PI's institution is able to provide for the proposed project. (Section 5: question 2)  
This is based upon:
      - the research ranking of the institution in general (similar to the Carnegie Classification of Institutions of Higher Education in which universities are classified by research activity as measured by research expenditures, number of research doctorates awarded, number of research-focused faculty)
      - and the specific support that would be provided by the institution to support the research / evaluation team while carrying out the proposed project (e.g., administrative support such as grant support services, office and lab space, personal computers and equipment, software, and /or technological support).



# Brady Education Foundation

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- *Expertise of PI / Research Team:*
  - Scoring for this criterion is based on the strength of the evidence provided (e.g., record of publications, prior grants) that provides confidence in the ability of the PI / Research Team to do the proposed project. (Section 5: question 3; CV's / Resumes of key personnel)  
This is based upon:
    - evidence of expertise concerning the topic area of the proposed project (e.g., the target population, the intended goals of the program)
    - evidence of expertise concerning the research methods that would be used in the proposed project
    - the level to which the intended procedures have been previously pilot tested by the research / evaluation team with the intended target population