

Evaluation of OSERS Grant Review Pilot to Use Reviewers with Mental Retardation

Prepared for the

Office of Special Education and Rehabilitation Services
U.S. Department of Education

by

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January 12, 2001

Executive Summary

Background

This report covers the evaluation of the pilot test, conducted by the Department of Education's Office of Special Education and Rehabilitative Services (OSERS), on the inclusion of self-advocates with cognitive disabilities on panels which review applications submitted for discretionary funds. The project resulted from concerns raised by some in the disability community that individuals with cognitive disabilities, specifically mental retardation, were not included among the potential reviewers who might be used to evaluate applications. They believe that there is a cadre of self-advocates active at the State and Federal levels who have the skills and experience to be good reviewers.

A small working group of OSERS staff began investigating in early 1999 how OSERS might use these self-advocates as reviewers. Given the serious opposition to the concept among OSERS staff, the group recommended a pilot test that would follow the official review. In the pilot test, each three-person panel would include a self-advocate. The working group also recommended an evaluation of the pilot test to address staff concerns and identify necessary accommodations.

Planning for the August 2000 pilot test began 14 months earlier and involved:

- The Center for Self Determination at the Oregon Health Sciences University (overall support and recruitment of the self-advocates);
- Perception Check of Cincinnati (training of the self-advocates);
- Educational Services, Inc. of Washington, DC (administrative and logistical support);
- OSERS staff; and
- Bonham Research of Baltimore (evaluation).

This evaluation studied the selection and training of reviewers, the review process, the impact of the review process on participants, and the scoring and recommendations of the individual reviewers and the panels. The evaluation tested 38 hypotheses derived from twelve concerns raised by OSERS staff. The pilot test involved 19 applications assigned to two sets (Panels 1 and Panels 2) of three panels each. (See **Box 1**.) One panel in each set (Official review) included three traditional reviewers. Two panels in each set (Pilot A and Pilot B reviews) included two traditional reviewers and one self-advocate reviewer.

| | Official | Pilot A | Pilot B |
|---------------------------|-----------------|----------------|----------------|
| Date of review session | 7/26-28/00 | 8/7-9/00 | 8/7-9/00 |
| Panel 1 | | | |
| # Applications | 10 | 10 | 10 |
| # Traditional Reviewers | 3 | 2 | 2 |
| # Self-advocate Reviewers | 0 | 1 | 1 |
| Monitor ID | 1 | 1 | 3 |
| Panel 2 | | | |
| # Applications | 9 | 9 | 9 |
| # Traditional Reviewers | 3 | 2 | 2 |
| # Self-advocate Reviewers | 0 | 1 | 1 |
| Monitor ID | 2 | 2 | 4 |

Box 1. Review Design and Characteristics

General Findings

The evaluation found that people with cognitive disabilities, categorized by the disability system and hereafter referred to as having mental retardation, can be effective reviewers of grant applications submitted in response to OSERS competitions. The previously raised concerns were not encountered during the pilot test. All of the specific hypotheses developed to test the effective contribution of people with mental retardation were supported. Five specific findings resulted from this pilot test:

1. Every review panel was different and produced slightly different results. However, all three review panels gave the majority of applications received the same recommendation of “approval” or “disapproval”
2. Panel outcomes were affected by the monitors as well as the reviewers. Panel monitors set the overall structure and expectation for panel discussions and recommendations, even though they did not participate directly in the discussions and decisions
3. Reviewer characteristics of gender and age influenced panel results, but not the classification of mental retardation
4. Training effectively prepared self-advocates with mental retardation to fully participate in the review process. However, new traditional reviewers felt they would have benefitted by similar training
5. Reviewers with mental retardation participated effectively with accommodations. Some of the accommodations were also needed or requested by traditional reviewers

Recommendations

Based upon the findings, the Evaluator makes the following recommendations to OSERS:

1. Include people with cognitive disabilities on future OSERS review panels, particularly in competitions related to their areas of expertise
2. Involve the self-advocates who participated in the pilot test on similar reviews in the near future to capitalize on their knowledge and experience
3. Provide training for all new reviewers that focuses on reading and evaluating past applications, participating in a panel discussion about them, and summarizing the panel’s discussion. Allow the training to be longer for those with cognitive disabilities and include their support people
4. Focus the orientation sessions on the specific aspects of the competition and review session and not attempt to use it for general training.
5. Restrict the number of applications each person is expected to review to a manageable number that is less than nine
6. Provide all the accommodations required by people with cognitive disabilities, and as many of the helpful ones as possible, knowing that people with other types of disabilities may need them as well. The accommodations by order of importance are as follows:
 - a. A support person who both knows the reviewer and is trained in the review process to assist in reading, organizing, locating, and other general support

- (required)
- b. Time for self-advocate reviewers and their support people to review applications together prior to panel meetings. This may require sending them the applications two weeks in advance for review at home, or bringing them to the session site several days in advance of the panel meetings (required)
 - c. Audio tapes with summaries or abstracts of the applications for initial orientation and overview of the applications (helpful for people who best learn audibly)
 - d. Binders for punched applications, colored dots and “stickies” to organize and find information (helpful).

Findings Related to Specific Concerns

The evaluation was planned to address twelve specific concerns raised by OSERS staff and others in the field. These are grouped by the four components of a standard evaluation with key findings:

Selection and Training

Concern 1--The other reviewers on the panels will have to be carefully selected for prior experience and willingness to work with people with mental retardation

- Traditional reviewers selected themselves and had little prior knowledge of the pilot test
- All traditional reviewers had worked with people with cognitive disabilities

Panel Process

Concern 2--Review panel meetings will take longer to accommodate people with mental retardation

- Pilot B review meetings took about as many minutes as the Official review meetings
- Pilot A meetings took longer due to unprepared traditional reviewers

Concern 3--Advance training will not be sufficient to prepare reviewers with mental retardation

- Self-advocate reviewers said their training prepared them for the panel meetings
- Traditional reviewers recognized the value of the training

Concern 4--Special training will be needed for the other reviewers, panel managers and competition managers

- Traditional reviewers felt they and the monitors were prepared

Concern 5--Reviewers with mental retardation cannot participate and contribute like other reviewers in panel discussions

- Self-advocate reviewers and their support people felt that they contributed
- Traditional reviewers gave self-advocates grades of A or B and were impressed with them

Concern 6--Reviewers with mental retardation cannot lead in panel discussions

- A traditional reviewer felt the self-advocate had “remarkable facilitation skills”
- The poorest leadership was by a traditional reviewer in the Official review session

Output

Concern 7--Reviewers with mental retardation cannot understand and use the selection criteria

- Self-advocate reviewers gave scores similar to experienced traditional reviewers
- Self-advocate reviewers gave scores different from a new traditional reviewer

Concern 8--Reviewers with mental retardation will be unduly influenced by the other reviewers

- Self-advocate reviewers changed their scores slightly more than traditional reviewers
- Self-advocate reviewers often changed scores away from those of traditional reviewers
- Support people reported the changes were based on conviction rather than conformity

Concern 9--Support people will influence the assessment of the application by reviewers with mental retardation

- Support was limited to reading, understanding, and locating, and not in assessing
- Traditional reviewers reported the support as appropriate

Outcome

Concern 10--The difference in final scoring of applications will be greater than would be expected between two review sessions selected in the traditional way

- The Official and Pilot B panels agreed on 17 of 19 recommendations
- Final scores averaged 72 for Official reviewers and 71 for Pilot reviewers
- Gender, age and session correlated with the final scores, but not type of reviewer

Concern 11--The written justification of scores will not be sufficient to help OSERS counteract challenges by unsuccessful applicants

- OSERS staff rated 16% of the Official summary justifications as excellent
- OSERS staff rated 47% of the Pilot A summary justifications as excellent
- OSERS staff rated 5% of the Pilot B summary justifications as excellent

Concern 12--The review process would be compromised by using reviewers who might lack certain cognitive capabilities and analytic skills

- Traditional reviewers would like to serve again with the same self-advocates
- Monitors reported that self-advocate reviewers were prepared and contributed