



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF POSTSECONDARY EDUCATION

September 28, 2016

Dear Colleague:

The U.S. Department of Education (Department) is in the process of **recruiting peer reviewers** to evaluate grant applications submitted for the fiscal year (FY) 2017 Upward Bound (UB) and Upward Bound Math/Science (UBMS) Programs. The peer review process will be held during five in-person sessions. Each session will consist of a two-week hybrid approach (first week electronically at home) and the second week (mandatory travel) held in the Washington, D.C. area. Please note peer reviewer expectations for each session listed below.

For additional information on the UB Program, please go to <http://www2.ed.gov/programs/trioupbound/index.html>. For additional information on the UBMS program please go to: <http://www2.ed.gov/programs/triomathsci/index.html>.

How to Apply to Serve as a Peer Reviewer:

Individuals interested in reviewing applications for UB and UBMS must complete the peer reviewer prerequisites by October 12, 2016. Individuals that do not complete the prerequisite process will not be considered for panel assignments. To complete the prerequisites please follow the steps below:

1. Visit and log in to <http://reviewgrants.com/upwardbound/reader/> to complete your reader profile and availability.
2. Next, review and acknowledge the role and level of commitment of a peer reviewer.
3. Finally, view the Department of Education G5 PowerPoint presentation and verify you are a registered G5 user.

Upon completion of the peer reviewer prerequisites you will receive a confirmation email. We will notify you in a second email if we select you as a peer reviewer for this competition, no later than **Friday, October 21, 2016**. At that time, selected peer reviewers will be sent additional information about the e-Reader and on-site review process, including information on how to participate in the **UB and UBMS Peer Reviewer Orientation conference calls (date and time to be determined)**. Those peer reviewers that are assigned to a panel will then be sent information pertaining to travel reservations to Washington, D.C.

Structure of Peer Review Sessions

Week 1 (Remotely at home):

Peer reviewers will download assigned applications from G5 and work with Department staff to resolve any issues that may arise during that process. Peer reviewers are also expected to prepare comments, panel and finalize a number of applications. Department staff will also reach



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out to peer reviewers during this week to briefly reiterate the review process (e.g. timelines/targets, conflicts of interest, application assignments, process clarifications, technical issues with G5).

Week 2 (On-site review in metropolitan Washington DC):

Peer reviewers will finalize draft evaluations for each application, make adjustments to comments and scores (if necessary), and complete/finalize evaluations in G5.

Upward Bound

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| UB Session 1 | |
| Applications Available to Panel Reviewers | December 8, 2016 |
| Panel Review | December 8-9, 2016 (e-reading) |
| <p><i>Reviewer Expectation:</i> <i>Because of the short e-reading week for session 1, peer reviewers are expected to have read and provided comments for three (3) applications in the system by 7:00 AM on Monday, December 12, 2016.</i></p> <p><i>The remaining applications will be read, paneled and finalized by Friday, December 16, 2016.</i></p> | <p>December 12-16, 2016 (on-site in Washington, D.C.)</p> <p>(Checking in on 12.11.16 checking out 12.16.16)</p> <p>Reader Orientation 7:00 PM on 12.11.16</p> |
| UB Session 2 | |
| Applications Available to Panel Reviewers | January 18, 2017 |
| Peer Review | January 23 - 27, 2017 (e-reading) |
| <p><i>Reviewer Expectation:</i> <i>Peer Reviewers will be expected to prepare a technical review with comments, panel and finalize five or more of the ten applications prior to arriving to Washington, D.C. The remaining applications will be read, paneled and finalized by February 3, 2017.</i></p> | <p>January 30 – February 3 (on-site in Washington, D.C.)</p> <p>(Checking in on 1.29.17 checking out 2.3.17).</p> <p>Reader Orientation 7:00 PM on 1.29.17</p> |
| UB Session 3 | |
| Applications Available to Panel Reviewers | February 1, 2017 |
| Peer Review | February 6 - 10, 2017 (e-reading) |



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| <p>Reviewer Expectation: <i>Peer Reviewers will be expected to prepare a technical review with comments, panel and finalize five or more of the ten applications prior to arriving to Washington, D.C. The remaining applications will be read, paneled and finalized by February 17, 2017.</i></p> | <p>February 13 - 17, 2017 (on-site in Washington, D.C.)</p> <p>(Checking in on 2.12.17 checking out 2.17.17).</p> <p>Reader Orientation 7:00 PM on 2.12.17</p> |
| UB Session 4 | |
| <p>Applications Available to Panel Reviewers</p> | <p>February 15, 2017</p> |
| <p>Peer Review</p> <p>Reviewer Expectation: <i>Peer Reviewers will be expected to prepare a technical review with comments, panel and finalize five or more of the ten applications prior to arriving to Washington, D.C. The remaining applications will be read, paneled and finalized by March 3, 2017.</i></p> | <p>February 21 – 24, 2017 (e-reading)</p> <p>February 27 – March 3, 2017 (on-site in Washington, D.C.)</p> <p>(Checking in on 2.26.17 checking out 3.3.17).</p> <p>Reader Orientation 7:00 PM on 2.26.17</p> |

Upward Bound Math/Science

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| UBMS Session 1 | |
| <p>Applications Available to Panel Reviewers</p> | <p>April 5, 2017</p> |
| <p>Peer Review</p> <p>Reviewer Expectation: <i>Peer Reviewers will be expected to prepare a technical review with comments, panel and finalize five or more of the ten applications prior to arriving to Washington, D.C. The remaining applications will be read, paneled and finalized by April 28, 2017.</i></p> | <p>April 17 - 21, 2017 (e-reading)</p> <p>April 24 – April 28, 2017 (on-site in Washington, D.C.)</p> <p>(Checking in on 4.23.17 checking out 4.28.17).</p> <p>Reader Orientation 7:00 PM on 4.23.17</p> |

Review Structure and Timeline

Review Web site. The Web site for the review (www.reviewgrants.com) will be available to peer reviewers throughout the entire peer review process. This site will contain valuable



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information about the review, such as the peer reviewers' guide, alerts, required forms, Federal Register notice(s), etc.

Peer Reviewer Orientation. A peer reviewer orientation webinar will be held twice on November 7, 2016 for UB (time TBD). The UBMS peer reviewer orientation conference call will be held in the spring of 2017 (date and time TBD). **Only peer reviewers who participate in the orientation will be eligible to be selected to participate in the peer review process**

Honoraria

Peer reviewers will receive an honorarium of \$100.00 per completed applications¹ (see definition below), plus \$100.00 for supplies (paper/ink), for any applications that you will need to print. (You will not be compensated for the printing of additional copies of the applications.) Potential peer reviewers who participate in the UB and UBMS Peer Review Orientation webinars and are subsequently selected as alternates and not assigned to a panel will receive an honorarium of \$100.00.

Role and Level of Commitment of Peer Reviewers

The Department seeks competent experts from the field (peer reviewers) to evaluate UB and UBMS applications that are submitted for funding consideration. Peer reviewers are expected to thoroughly assess the quality of each assigned application based solely on the selection criteria, develop comments using descriptive and qualitative language and document corresponding scores to support the review. Peer reviewers will also work collaboratively with fellow panelists and Department staff to finalize each technical review form and maintain confidentiality and discretion throughout the review process. Each peer reviewer will be assigned to a panel comprised of three peer reviewers, and each peer reviewer panel will be required to evaluate *approximately* ten (10) applications that are each a maximum of 60 double-spaced pages in length.

Please carefully consider your decision to commit to the peer review process because it can be a laborious and time-consuming process that requires your full and consistent participation for the entire duration of the process, and you must adhere to specific deadlines/targets. Peer reviewers will be expected to work diligently and be reachable each day of the peer review between the hours of 8:00 a.m. – 5:00 p.m. (Washington, DC time). **Please note that Department staff reserves the right to dismiss any peer reviewer who is not performing up to these expectations (e.g. quality and timeliness of work) and will only compensate peer reviewers after all tasks have been successfully completed according to targets/timelines – no partial payments will be rendered.** A complete review of each application consists of a thorough analysis of the application, productive panel discussion, adequately addressing requested changes and corrections, and final clearance by Department staff. Again, peer reviewers will not receive

¹ A complete review of each application consists of a thorough analysis, productive panel discussion, adequately addressing requested changes and corrections, and final clearance by Department staff.



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any compensation if evaluations have not received final clearance by Department staff and all terms and conditions of the contract are not adhered to, as outlined in this letter.

Since peer reviewers are required to develop electronic evaluations of each assigned application using the Department's G5 e-Reader System at: <http://www.g5.gov>, peer reviewers must have: (1) access to the Internet from your local review site via broadband or DSL (not a dial-up connection) to be able to talk on a land line telephone or a cell phone with strong connectivity AND access the Internet concurrently; (2) Internet Browser IE 5.5+, Netscape 6+ or FireFox 1+ (note: e-Reader is best viewed using Internet Explorer 5+); (3) Acrobat Reader for opening PDF documents; (4) Microsoft Word (if PDF package is not available); (5) cookies and JavaScript enabled in your browser; and (6) a laser printer. Please go to the G5 Web site to obtain additional information. The site includes contact information for technical assistance, a users' guide and a demonstration program to assist peer reviewers in operating the software.

Thank you for your interest in serving as a peer reviewer for the UB and UBMS programs. Again, we encourage you to think carefully about your availability and the required commitment to this process. Peer reviewers **must** be available and committed to devote a significant amount of time to this process that consists of a lengthy analysis and discussion of the merits of the assigned applications and extensive collaboration with the other panel members and/or Department staff in order to ensure that comments and scores are correct and provide useful feedback to applicants. All activities must be completed by the specified dates. As a peer reviewer, you will be compensated for your services; and therefore, you are considered as a "temporary" Federal contractor. **You will be expected to comply with all of the requirements and expectations addressed in this document.**

Sincerely,

Linda Byrd Johnson, Ph.D.
Senior Director
Student Service