

Product Review Guideline Summary

ITTM Table 6.1

A. Reports, Policy Briefs, Memos to Senior Officials

Institution Importance level	Review method^a
Institutional importance. Reputation of the organization could be compromised	A genuine expert on the subject from outside the organization or within (but who has not worked on the project) prepares the review and it is read by senior management, as well as research director, and changes subsequently made are shown to the same managers and, if needed, the outside expert.
High importance. Major visibility for the product, particularly complex or risky analysis involved, or conclusions likely to be politically sensitive	Team leader and research director review the report or recruit (internal or external) expert who has not worked on the project. Senior management informed.
More routine report	Team leader manages the review; reviewer likely on staff but, as always, not a member of project team.

a. Degree of rigor may be reduced if the product under review is based on one that has already been through the review process.

B. Presentations

Institutional Importance level	Review method^b	
	Experienced researcher and presenter	Less experienced staff
Institutional importance. Reputation of the organization could be compromised	Presenter meets with senior management to review conclusions and policy recommendations. A practice presentation is usually appropriate.	Presenter walks through the presentation, likely using Power Point deck, with a senior research and a senior manager with emphasis on conclusions and policy recommendations. Practice presentation is standard.
High importance. Major visibility for the presentation, particularly complex or risky analysis involved, or conclusions likely to be politically sensitive	Presenter meets with senior colleague to review conclusions and policy recommendations	Presenter walks through the presentation, likely using Power Point deck, with senior analyst, emphasizing conclusions and policy recommendations. The senior analyst may ask for a practice presentation.
More routine presentation	None	Presenter meets with senior colleague to review conclusions and policy recommendations

b. Assumes the underlying research has already been reviewed.

C. Postings on the organization’s website prepared by research staff

Type of posting	Experienced researcher	Less experienced staff
Blog post	Editorial review—flags issues of too-strong advocacy or possible factual issues to communications leader or research director	Content review by senior analyst working in same area and then editorial review as for the experienced researcher.
Project information/description	Coordinated with communications group; editorial review	Coordinated with communications group; editorial review

D. Communication’s Group Staff-prepared Content

Content type	Reviewer
Descriptions of projects, project findings and related policy development; press releases	Lead researcher; editor
Other content, e.g., event invitations, descriptions of the think tank (“About Us” content) posted on website, etc.	Originator’s superior in the communications group or senior management on exceptional basis

ITTM Figure 6.1 Routing Form for Written Products



**RESEARCH
REVIEW AND RELEASE (R&R) FORM**

CONTACT PERSON ROUTING THIS FORM: ext:

TITLE:			
Author(s):			
Policy Ctr:	Date of document:	No. of Pages:	

Comm Use Only
Pub ID
By:
Date:

FUNDING Prepared with funding under a grant or contract?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, Funder:	Project No.:	Contract No.:

CONFIDENTIAL DATA Does this use confidential data?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, Source:	Release Approval (signature):	

DOCUMENT STATUS	<input type="checkbox"/> FINAL, Releasable	<input type="checkbox"/> FINAL, Not Releasable	<input type="checkbox"/> DRAFT, Releasable
<i>non-releasable drafts, status or financial reports do not need an R&R - take directly to Contracts</i>			
Transmit to Funder?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	If yes, attach transmittal letter for Contracts Office

WEB PUBLISHING	Publish to: <input type="checkbox"/> Urban.org <input type="checkbox"/> Other UI Site:	<input type="checkbox"/> NOT FOR WEB
If publishing to the web, indicate these requirements have been completed:		
<input type="checkbox"/>	Light web-ready edit by Publications office Arrange at least 24 hours in advance with Scott Forrey in Communications (not required if document was produced by the Publications office or was previously already published elsewhere.)	
<input type="checkbox"/>	FINAL report PDF and a 100-word or less abstract e-mailed to RandR@urban.org . Use report title as your subject.	
<input type="checkbox"/>	One copy of the abstract, cover page, and transmittal letter (if needed) attached to this form	
<input type="checkbox"/>	If report was published elsewhere, copy of e-mail giving UI permission to post attached	
<input type="checkbox"/>	Topics/tags for the publication selected on page 2 of this form	

SPECIAL INSTRUCTIONS	
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Author's Signature _____ Date _____

RELEASE VERIFICATION	
Center Director	Center Director verifies that this document has been reviewed for substance and presentation and meets the Institute's quality and review standards.
	Signature _____ Date _____
Contracts Office received:	Restrictions on UI release: <input type="checkbox"/> none <input type="checkbox"/> as follows:
Communications	Signature _____ Date _____

Reviewer Prompts in Assessing Analytic Reports

ITTM Annex 6.1

Document Name	
Author	
Name of Reviewer	
Date:	

	Question
A	General
A.1	Is the issue well-defined and the case for its policy importance effectively made?
A.2	Is the issue defined or structured in such a way that a clear hypothesis or researchable question is stated?
A.3	Are all the relevant aspects of the issue included for analysis?
A.4	Are relevant previous studies on the issue in the country cited and built on?
A.5	Do the authors show knowledge of the relevant international studies on this topic?
A.6	Has the right type of information and data been assembled to address the issue? If not, what was omitted that should have been included? Where sample data are employed, is the sample correctly drawn to be representative? Is it sufficiently large for the necessary tests?
A.7	Are the methods employed appropriate? Are statistical tests used where needed?
A.8	Is the report well-organized and clearly and succinctly written?
B	Conclusions and recommendations
B.1	Are the conclusions based squarely on the paper's findings? (or do the authors go beyond the findings in effect expressing personal views or political opinions?)
B.2	If the conclusions call for action through government programs, is the cost realistically estimated? Is the administrative feasibility and complexity of the program considered?
B.3	Do the authors consider various options for addressing the issue and the merits of each, or focus exclusively on a single approach?

B.4	In general, do the authors draw out the full policy implications of the findings and make realistic suggestions for their use in changing current policies?
B.5	Where appropriate, do the authors suggest what additional data could be collected and/or analysis undertaken to better answer the question posed or to answer additional questions the study raised?
C	Reviewer's summary comments (use as much space as needed)

Guidelines for Rating Policy Research Reports

	Question	Very Weak	Very Strong
A	General		
A.1	Is the issue well-defined and the case for its policy importance effectively made?	Hard to identify the issue under discussion, possibly because it is confused with others; or issue is stated but there is no attempt to explain why it merits public policy attention.	Issue crisply and clearly defined and a cogent case for its policy importance and timeliness is made.
A.2	Is the issue defined or structured in such a way that a clear hypothesis or researchable question is stated?	Difficult-to-impossible to understand the specific question or hypothesis that is the research subject.	The basic policy issue is expressed in a way that makes addressing it empirically straightforward and accessible to the reader.
A.3	Are all the relevant aspects of the issue included for analysis?	Author leaves out a key point, e.g., the distribution of benefits or subsidies or the efficiency with which they are employed, while focusing only on the total subsidy amount	All relevant elements are noted. (It is not necessary that they all be covered in the paper, but enough information should be provided to fully understand the situation.)
A.4	Are relevant previous studies on the issue in the country cited and built on? ^b	No prior studies are cited.	There is a good review of the prior studies and the advances that the current research makes over the prior is clearly articulated.
A.5	Do the authors show knowledge of the relevant international studies on this topic? ^b	Such studies are not mentioned.	This study exhibits knowledge of the relevant literature and states or implies its influence on the current study.
A.6	Has the right type of information and data been assembled to address the issue? If not, what was omitted that should have been included? Where sample data are employed, is the sample correctly drawn to be representative? Is it sufficiently large for the necessary tests?	The selection of data seems arbitrary and not well-suited to the study. Where survey data are used, insufficient information is provided to judge its quality, or the information provided makes problems with the sample clear.	The data employed are ideal for the study. Where survey data are used, the sample is well-described and clearly appropriate for the task at hand.
A.7	Are the methods employed appropriate? Are statistical tests used where needed?	The authors do not employ the relevant statistical tests but rather just describe qualitatively the patterns in the data.	Relevant statistical tests are used throughout. The author interprets the results of the tests effectively.
A.8	Is the report well-organized and clearly and succinctly written?	The report is very poorly structured, with little logic to the sequencing of the presentation. The writing style	The report is well-organized and tightly written. The flow of language makes it easy to read. There are few extra words. The

		is very wordy or otherwise makes it hard for the reader to understand the argument being made and the information presented. Tables are poorly constructed and hard to understand without referring to the text.	author exercises good judgment in allocating material to annexes. Tables are thoughtfully constructed and can be understood without referring to the text.
B	Conclusions		
B.1	Are the conclusions based squarely on the paper's findings? (Or do the authors go beyond the findings, in effect expressing personal views or political opinions?)	There is little relation between the analysis and the conclusion. For example, the author brings in political considerations, e.g., income distribution, when this is not at all the subject of the analysis. Personal opinions are expressed.	The conclusions are firmly based on the analysis. The findings' implications are carefully and fully drawn out.
B.2	If the conclusions call for action through government programs, is the cost realistically estimated? Is the administrative feasibility and complexity of the program considered?	Cost and administrative considerations are not covered.	The author provides defensible estimates of the cost involved and realistically discusses the administrative issues involved. (The extent of detail necessary will vary with the objective of the study.)
B.3	Do the authors consider various options for addressing the issue and the merits of each, or focus exclusively on a single approach?	The authors focus on a single approach with little or no justification for its selection. Other options are not even acknowledged to exist.	Relevant options are presented and criteria by which they should be judged are explicitly stated. The criteria are applied to the options and the superior one selected for recommendation.
B.4	Are the authors careful not to make proposals that go beyond the study's findings?	The proposals are far too broad, extensive or otherwise beyond what the study's results can defend.	The recommendations are consistent with the specific findings of the study. If more general statements are made, they are fully labeled as not being based specifically on the study's findings.
B.5	<i>Where appropriate</i> , do the authors suggest what additional data could be collected and/or analysis undertaken to better answer the question posed or to answer additional questions the study raised?	There is no treatment of these topics.	It is either not appropriate to make such suggestions or the authors lay out how the data deficiencies they encountered could be remedied in the future.