

Panel Building



An Introduction

Aims of Session:

1. To provide context for panel meetings
2. To outline the process of selecting panellists
3. To highlight the requirements of building a balanced panel





Role of Panels

- Panels consist of selected scholars and subject specialists
- Panellists usually (but not necessarily) drawn from the Peer-Review College (PRC).
- A panel will either moderate or assess a selection of applications, assigning grades that rank projects in priority order of funding

Types of Panels

Two main types of panel:

- **Moderating Panels** – ensure that peer-reviews are fair, balanced and pertinent (moderate existing peer-reviews).
- **Assessment Panels** – act as the peer-review stage of applications (directly assess applications)

In most cases, the AHRC uses Moderating Panels.

Panel Building Requirements



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- A panel chair (ideally from AHRC's Strategic Reviewers College)
- Between 8 and 10 panel members (depending on number of applications)
- Balanced panel (gender, region, experience and subject coverage)
- No conflicts of interest, e.g.:
 - panellists from the same institution
 - panellists from same institution as PI or Co-I on an application
 - panellists named on application being assessed at meeting
 - panellists with close working relationship to PI or Co-I



Panel Building – Tableau



Tableau – AHRC Operations – Panel Building – Panel Building – Panel Building



Researching panellists

- 1) Select the Meeting by applying the “Meeting Name” filter
- 2) Tableau will give you a good visual representation of the classifications included in the meeting. While it is important to have a good balance of different disciplines, it is probably a good idea to make sure that you have invited academics representing the most common classifications.
- 3) You can check for conflict by clicking on the name of potential panellists. Tableau will also give you other information about them, such as College membership, Top classification, Attendance on previous panels, etc.
- 4) As always, if you want to further research someone (e.g. dwell into their area of expertise), you can Google them

On Tableau



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The screenshot displays a Tableau dashboard with three main sections:

- Reviewers included in meeting:** A table with columns: Review Status, Person ID, Contact Name, Grant Reviewed. It shows two rows: one with 'Null' values and another with 'Accepted' status.
- PIs/Fellows & Co-Is included in Meeting:** A table with columns: Role, Name. It shows a 'Co Investigator' role with a redacted name.
- Potential Panellists:** A table with columns: CDR ID, Full Name, Resear..., Department., Region, Gender, Meeting Role, Participant Status, Previous Meeting Ti., Meeting Name, College Name, Day of College Start., Day of College E., Top Classific., Secondary Class... A dropdown menu for 'Top Classification' is set to '(All)'. The table content is mostly redacted with a black box.

Selecting the Chair

- 1) The Chair is the first one to be selected, pre-approached, and approved, before a decision on any other panellists is made. The date of the panel meeting will be decided based on the Chair's availability.
- 2) Ideally, the Chair will be an experienced panellist, likely from the Strategic College. It is, however, advisable to discuss your choice of Chair with the respective Grants Operations Manager when you are selecting them.
- 3) Upon reaching an agreement/approval from the GOM, the Chair will need to be pre-approached. ***Is the template still used?? – link*** The availability of the Chair will determine the date of the Panel Meeting.

Selecting Panellists

- 1) Following the appointment of Chair and confirmation of the Panel Meeting date, panellists will need to be selected. As already discussed, the Panel will need to be balanced, including a diverse group of academics representing different characteristics, such as gender, region, area of expertise, experience.
- 2) Once the panellists have been selected and any conflict of interest has been ruled out, they need to be approved by the GOM, and pre-approached. Ideally, all panellists will have confirmed their attendance before they have been assigned as Introducers on Siebel. However, things can change, and if an unexpected event occurs (i.e. a panellist cancelling last minute), the respective GOM will need to be consulted on potential next steps.
- 3) Panellists are pre-approached off-system – *is there a template in existence?*

Assigning Introducers

- 1) It is the Funding Officer's responsibility to decide and select the introducers for proposals. These are designated panel members who will read the proposals in-depth and assign an initial grade.
- 2) Generally proposals must have three introducers on a grant – primary, secondary and supporting. The FO will need to be careful about any potential conflict of interest, and that all introducers get a fairly even split of proposals by number.
- 3) When assigned roles and applications, the introducers will need to be recorded on the Meeting record, as well as on Siebel.

Assigning on Siebel



Home Activities Grants Contacts Enquiries Studentships Panels Meetings Organisations Colleges Scheme - Administration

Meetings Home Meeting List

Meeting Participants Email Audit **Introducer Detail** Lists Enquiries Attachments Introducer Summary Upload Outcomes Notes Activities

All Grants

Query Menu 1 - 10 of 12+

You are working in a position that enables you to access data for AHRC

Find

Reference	RO Reference	List Name	Applicant/Grant H	Title	Organisation	Department
[Redacted]						

< [Progress Bar] >

⏪ ⏩

Introducers

New Delete Query Menu 1 - 3 of 3

Invite Find

Last Name	First Name	Department	Organisation	Role	Score	Work #
[Redacted]						

< [Progress Bar] >

⏪ ⏩

Conflicts Of Interest

Query Menu 1 - 10 of 10+

Introducer Summary

Query Menu 1 - 10 of 10+

Assigning on Meeting Record



1	Research													
2														
3	Grant information				PI Response	Introducer scores						Final Scores		Conflicts of Interest
4	Grant Reference	Applicant	Grant Title	Research Organisation	No PI Response	1st	Grade	2nd	Grade	Supporting	Grade	Overall Grade	Ranking	Conflicts of Interest & reasons (panellist left the room for discussion of the proposal)
5														
6														
7														
8														
9														
10														
11														
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Key Points

- Discuss with Grants Operations Manager to decided optimum number of panellists
- Ensure (as far as possible) balance: gender, region, subject coverage, experience
- Check for Conflicts of Interest (if any arise, discuss with Grants Operations Manger)
- Fix date to send out meeting documents (e-volume) to panellists - minimum four weeks before date of panel meeting
- Keep track of peer-review status of applications, and highlight any that are unlikely to be ready before e-volume date
- Send reminders to other FOs working on the call regarding upcoming meeting dates and deadlines
- Applications must have a Usable PI Response in order to go a panel meeting