PANEL BUILDING

FUNDING OFFICER TRAINING

TYPES OF PANELS

MODERATING PANELS
(RESPONSIVE MODE)

ASSESSMENT PANELS
(THEMATIC/STRATEGIC)

Moderating Panels (Responsive Mode)

- Reviews
- Classifications experience
- Moderate reviews & PI response

Assessment Panels (Thematic)

- Directly assess applications
- Experts in the field
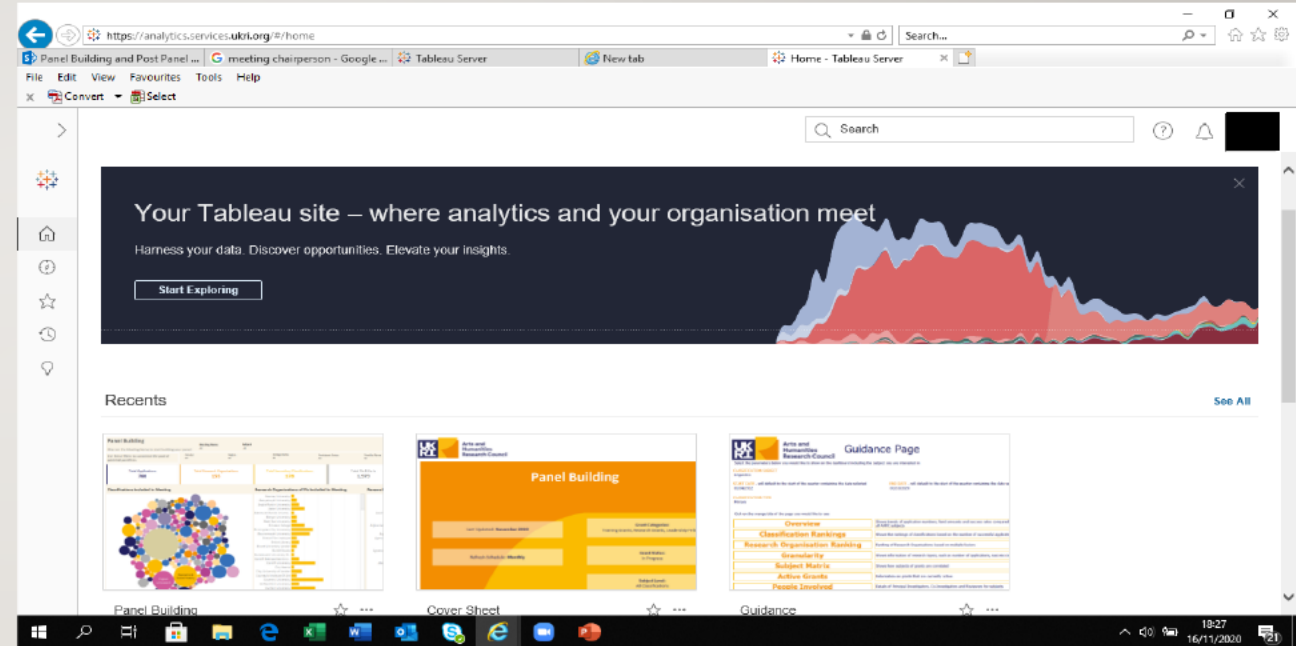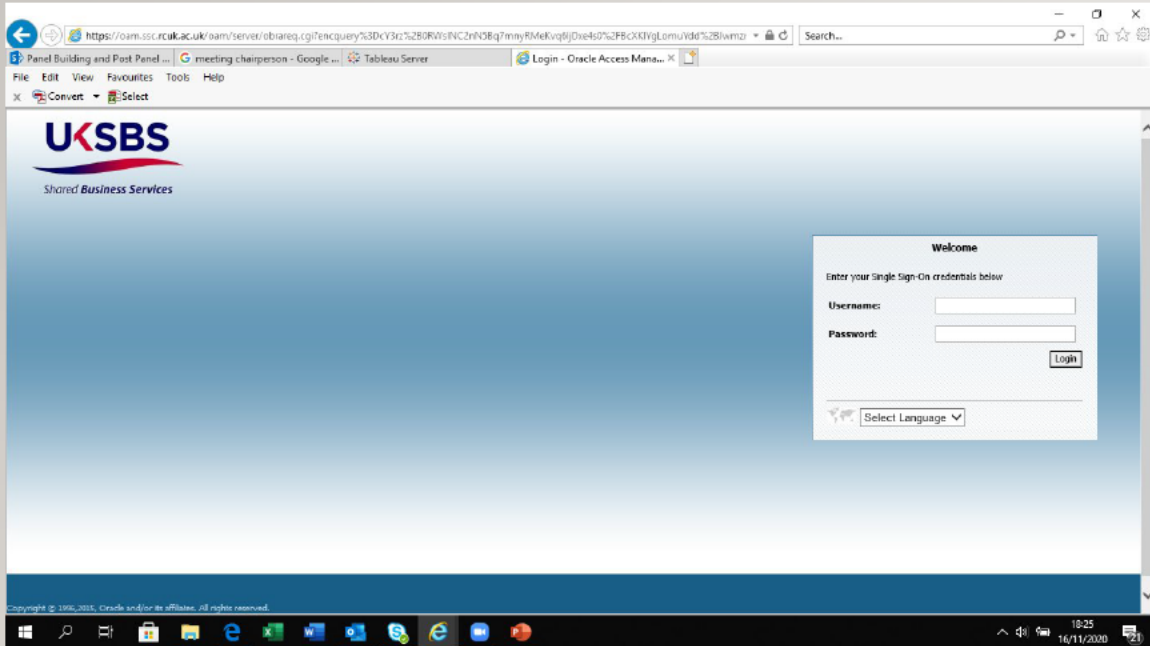- Potentially recommended

WHAT DO YOU NEED TO BUILD A PANEL?

- Chair

  - Strategic College or very experienced Academic College member

  - Approved by GOM/███

- Panellists

  - Usually from the Peer-Review College

  - Max 11 panellists, dependent on meeting

  - Specialists in field or across all classifications

Points to Remember

Gender balance	Membership dates
Regional spread	Experience
Frequency of panel attendance	Same RO
Consecutive panel meetings	Conflicts

Step 1: Panel Building uses both Seibel and Tableau

Get signed up for a Account NOW!

Click on Panel Building

Select 3 males and 3 females that you think would make a good chair.   Then go to Seibel

1 Find Meeting

3 Check for CoIs

2 Insert Possible Names

Find 2 males and 2 females and give the names to you GOM.   They will discuss with ███ and confirm their choice/s

Agree on the week of the panel meeting and the preferred days with your GOM. Usually Tuesday to Thursday.
Write an e-mail approach to your chose chair.

You need to get your Chair signed up at least 6 weeks before the panel. Watch out for holiday periods etc. Always allow more time!

Once you have the chair signed up mark the panel meeting in your calendar and set yourself weekly checks. Add the Chair to Seibel and mark as APPROVED and then ACCEPTED.

From: ███████████████████████████████
Sent: ███████████████████████
To: ██████████████████████████
Subject: Invitation to Chair Research Grants October panel

Dear ███████████████,

AHRC would like to invite you to chair a panel to assess Research Grants applications for October.

You have been chosen because of you previous experience of the role of chair as well as a panel member.

We would be meeting remotely and have identified the week beginning October 26th with 28/29th being the preferred days. If you are willing to accept this invitation could you indicate which days best suit you.

If you have any questions, please feel free to contact me.

Kind regards

████████████

Building Your Panel

Go back to Tableau and use the tabs to find the categories of panellists that you are looking for:
1 Equal gender split
2 One from each region
3 At least half have experience of at least one panel
4 Some new panellists (next generation)
5 Avoid panellists used in last 6 months and certainly in the last panel
6 Look at a range of areas of expertise
7 Watch for obvious CoIs
8 Draw up a table and fill it in

Region	Name/ Gender	No. of Panels	When last used	Expertise
North				
South East				
London				
Y+H				
East Anglia				
South West				
Scotland				

Take your list and check in Seibel for any Conflicts (both soft and hard). It should be possible to get a list of 10 possible panellists without any.................. but it takes time!

Tip: Try to avoid the most popular ROs as it is likely that a forthcoming meeting will have applicants from there. Look out slightly less well known ROs.

If it is impossible we can accept one hard conflict where the panellist will have to leave the meeting when that grant is being discussed, but it is not ideal.   Equally soft conflicts can be tackled by the panellist muting during the discussion.   However, where possible avoid any names with soft or hard conflicts.

When you have your names add them to Seibel.
Write to each of the panellists in the same way as you did for the chair. Where panellists accept add it to Seibel. Where they decline **repeat the process.**

Get you panel completed **3-4 weeks** before the meeting

Other Important bits

- Strategic panels often need assembling at shorter notice than responsive ones
- You may be directed as to who to invite to strategic panels. This may include people not attached to ROs but are governmental or non governmental organisations. These people will not be on Seibel or their organisations and so they will need adding (this takes time)
- There may be input from senior members of AHRC so changes/issues will need checking with them
- PRC members are always first choice but there may be need to go off college
- For responsive mode panels keep an eye on the list of applications as each one will need their PI response to have come in before the panel. You may need to chase missing PI responses. Watch out for late additions to the panel meeting as this may through up new conflicts of interest
- Once all the panellists have signed up you can allocate Primary, Secondary and Tertiary Introducers to the meeting record and inform the panellists.
- Get the PSOs to draw up the e-vol on the extranet and inform the panellists checking that they are signed up for the extranet.
- In the last two weeks before the panel check if there are any late papers to be added (late reviews/PI responses) and inform the panellists