

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?

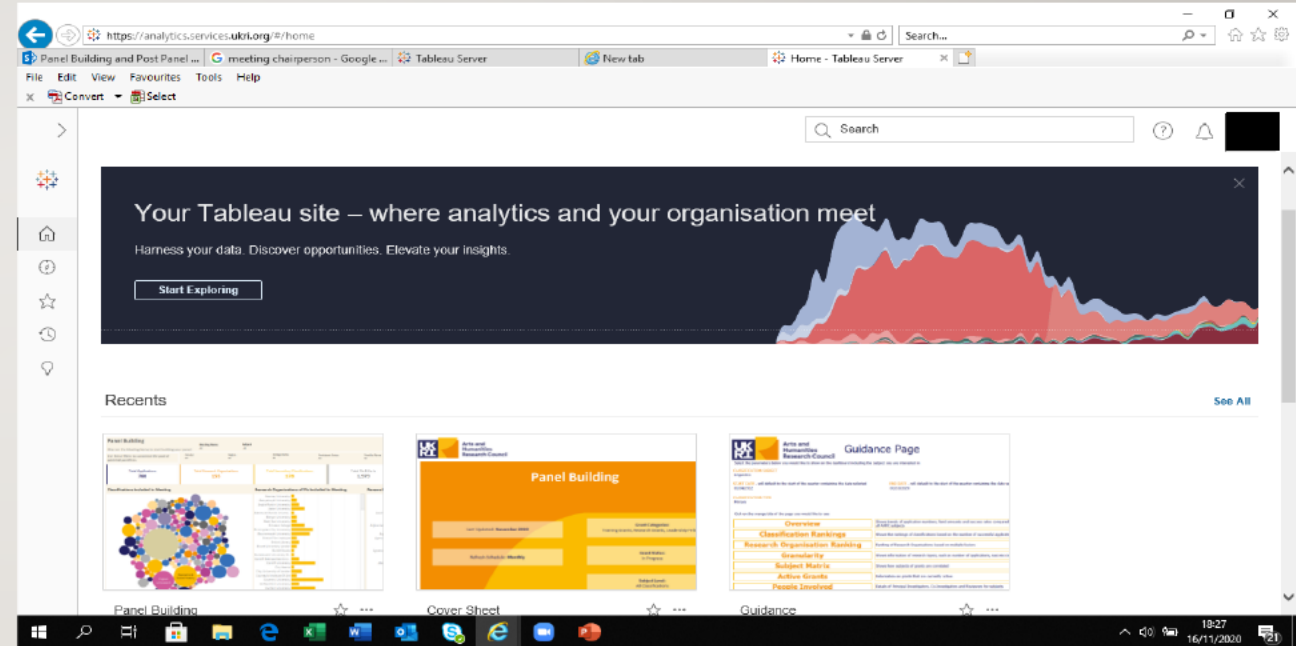
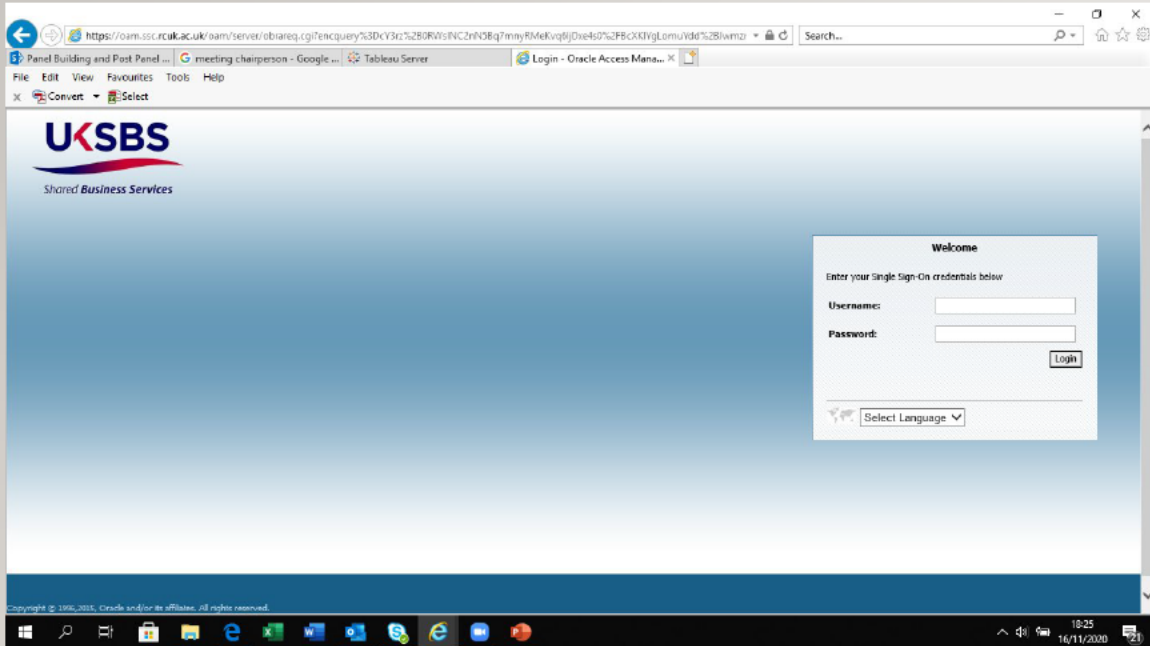
- Chair
 - Strategic College or very experienced Academic College member
 - Approved by GOM/ [REDACTED]
- Panellists
 - Usually from the Peer-Review College
 - Max 11 panellists, dependent on meeting
 - Specialists in field or across all classifications



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!

Browser window showing the Tableau Server home page. The address bar displays <https://analytics.services.ukri.org/#/home>. The page features a large banner with the text "Your Tableau site – where analytics and your organisation meet" and a "Start Exploring" button. Below the banner, the "Recents" section displays three thumbnails: "Panel Building", "Cover Sheet", and "Guidance". A yellow callout box with the text "Click on Panel Building" points to the "Panel Building" thumbnail. The Windows taskbar at the bottom shows various application icons, including the Start menu, search, task view, and several open applications like Edge, Excel, Word, and PowerPoint. The system clock indicates the time is 18:27 on 16/11/2020.

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Browser window showing the URL: <https://analytics.services.ukri.org/#/views/PanelBuilding/CoverSheet?iid=1>

Navigation bar: Explore / AHRC / ... / Panel Building / Cover Sheet

Menu: File Edit View Favourites Tools Help

Buttons: Convert Select

Toolbar: Undo Redo Revert Refresh Pause View: Original Alerts Subscribe Share Download Comments Full Screen

Tab: Cover Sheet Panel Building

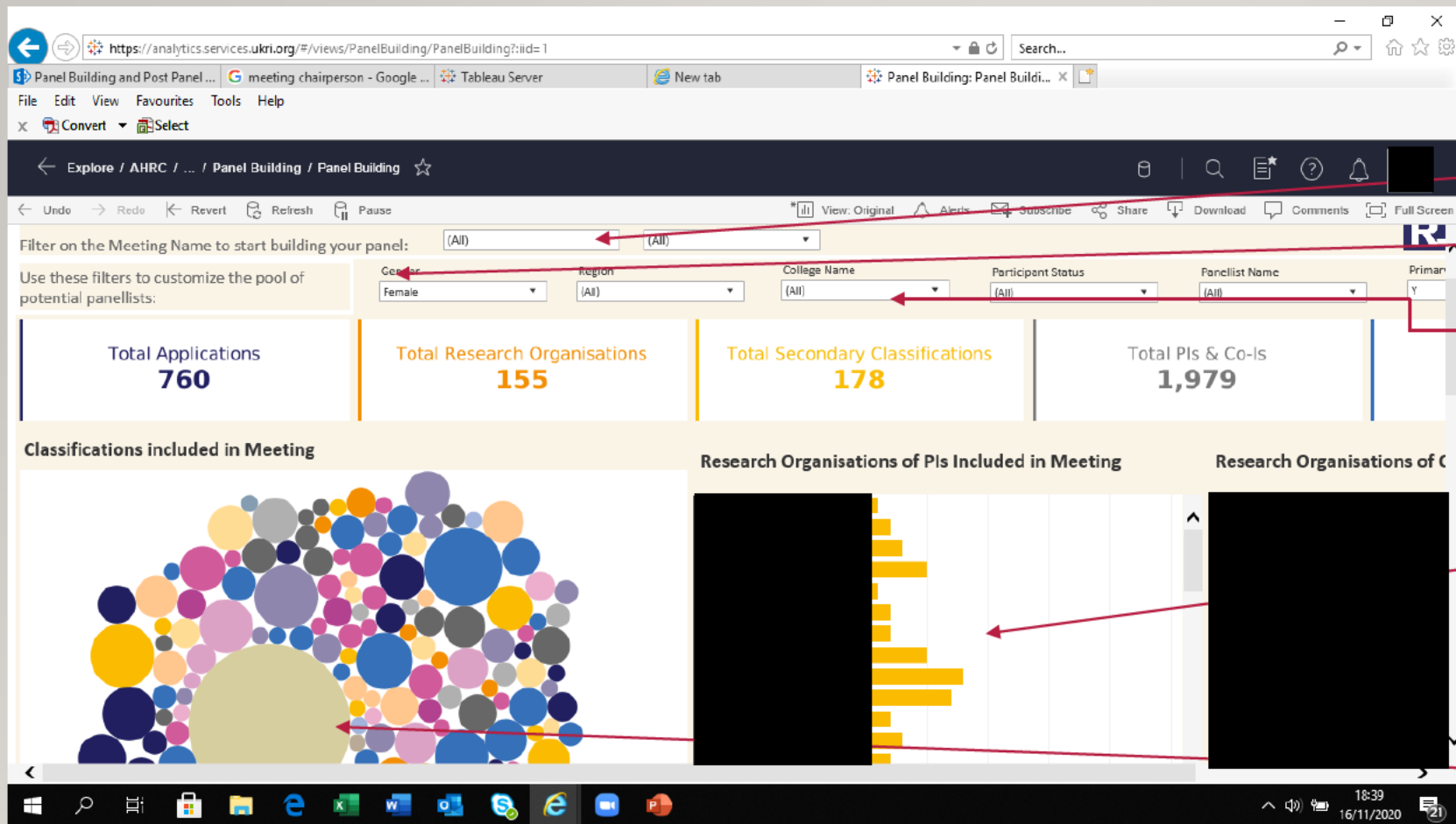
UKRI Arts and Humanities Research Council

Panel Building

Last Updated: November 2020	Grant Categories: Training Grants, Research Grants, Leadership Fellows
Refresh Schedule: Monthly	Grant Status: In Progress

Windows taskbar: 18:33 16/11/2020

Click on Panel Building Tab



Locate your chosen meeting

Select Chose Gender or Region
College name using these tabs

ROs involved in meeting

Classifications in the meeting

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

UKSBS Meetings

Home Activities Grants Contacts Enquiries Studentships Panels Meetings Organisations Colleges

Meetings Home Meeting List

All Meetings in My Council

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

New	Meeting Name	Description	Type	Start Date	Created By	Panel	Responsibilities	Status	Payment Eligible
	Research Grants: December 2020			01/11/2020 09:00				Creating	

1 Find Meeting

UKSBS Meetings

Home Activities Grants Contacts Enquiries Studentships Panels Meetings Organisations Colleges

Meetings Home Meeting List

Conflicts Of Interest

18 - 27 of 47

Soft Conflict	Hard Conflict	Description	Reference	First Name	Last Name	Create
						05/11/20
						05/11/20
						05/11/20
						05/11/20
						05/11/20
						05/11/20
						05/11/20
						05/11/20
						05/11/20
						05/11/20

3 Check for Cols

UKSBS Meetings

Home Activities Grants Contacts Enquiries Studentships Panels Meetings Organisations Colleges

Meetings Home Meeting List

Meeting Participants

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

All Grants

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

Reference	RO Reference	List Name	Applicant/Grant Title	Organisation	Dept

2 Insert Possible Names

Find 2 males and 2 females and give the names to you GOM. They will discuss with [redacted] 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: [REDACTED]
Sent: [REDACTED]
To: [REDACTED]
Subject: Invitation to Chair Research Grants October panel

Dear [REDACTED],

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

[REDACTED]

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 Cols
- 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