

Checklist for Ford Panel Chairs and Co-Chairs

When Panels Convene:

1. Once all reviewers have joined the Zoom meeting, the Panel Assistant will go over general housekeeping rules for the virtual meeting and will facilitate introductions, first of the reviewers and then of the Co-Chair and Chair.
2. When prompted by the Panel Assistant, introduce yourself and then give a brief introduction to include the following:
 - Set expectations in terms of communication, workload, and timing for the panel:
 - Confirm schedule on agenda; virtual panel should end at 5:00 pm EST on the 1st day.
 - Rater system will remain open overnight.
 - Reconvene at 11:00 am EST on 2nd day.
 - Awards must be determined before panel ends so they can be certified.
 - Provide overview of panel workflow:
 - All applications must first be given three reviews. After that, reviewers will focus on additional reads for the most competitive applications.
 - Deliberations will begin once all competitive applications from the same level have received 5 reads.
 - Share the number of applications and number of awards at each level. The Panel Assistant will have this information available.
 - Discuss conflict of interest (COI):
 - Request that reviewers report COI to the Panel Assistant.
 - During deliberations, reviewers who are conflicted will be placed in a Zoom breakout room during the discussion of the relevant applicant.
 - Discuss the responsibility of each reviewer to use the entire scoring scale.
 - The Panel Assistant, Chair, or Co-Chair will engage reviewers who are not using the entire scoring scale.
 - Confirm the scoring scale; 1.0 is highest.
 - Scores can be updated until deliberations are opened.
 - **Reiterate importance and appropriateness of comments and sliders for feedback.**
 - Comment examples are available in the left-hand menu of the rater module.
 - Remind reviewers that positive factors are only to be used during scoring.
 - Positive factors are not to be used during deliberations.
 - Inform reviewers to send questions about application eligibility or completeness via **private Zoom chat** to the Panel Assistant.
 - Remind reviewers that a roster of all reviewers in the panel is available in the left-hand menu of the rater module.

Score Changes/Editing Comments:

- At the beginning of the panel meeting, the Panel Assistant will open the rater system for 15-30 minutes to allow reviewers to make any score edits of self-paced reviews completed prior to the meeting.
- The Panel Assistant can un-submit applications for score changes any time before deliberations begin.
- Reviewers can add/modify comments at any time and until **11:59 pm EST the day after the panel meeting ends.**

Work Roster – Virtual Panel Reads:

1. The Panel Assistant will assess the status of application reads.

- Some reviewers may not have completed or may have scored, but not submitted their self-paced reviews.
 - The Panel Assistant will confirm if the evaluation(s) will be completed and submitted.
 - If not, the assignment will be deleted so that it can be evaluated by another reviewer.
- 2. When all applications have 3 reads – either completed or in progress – reviewers can begin reading competitive applications.
- 3. The Panel Assistant will monitor the panel reports and will inform the Chair of:
 - Outside read requests or transfers
 - Concerns with rater scoring (e.g. reading too quickly, not entering comments, inappropriate comments)
- 4. If needed, toward the end of the reading period, the Panel Assistant will begin assigning applications to reviewers.
- 5. The Panel Assistant will inform the Chair when competitive applications are close to having 5 reads and indicate that panel will soon be ready to begin deliberations.

Before Deliberations Begin:

1. Confirm with the Panel Assistant that all competitive applications have 5 reads completed on the Work Roster.
2. Offer reviewers a final opportunity to **revise scores** before the Panel Assistant opens the Deliberation Roster.
3. Remind reviewers to add comments while they are waiting for deliberations to begin.
4. Confirm with reviewers and the Panel Assistant that any opened applications have been (re-)submitted.
5. Remind reviewers that **no score changes can be made once the Deliberation Roster has been opened**.

Deliberations Process:

1. The Chair should outline ground rules/expectations for deliberations with reviewers:
 - Reviewers with COIs will need to join a breakout room during discussion of the applicant.
 - Reviewers should refrain from using the Zoom chat; content in the chat will not be part of the deliberations.
 - Reviewers who wish to speak should use the raise hand function; the Chair will call on reviewers to speak.
 - Reviewers **should not** apply positive factors during deliberations. Deliberations **should not** include reference to race or ethnicity or institutional diversity as a rationale for moving applicants on the roster.
 - Reviewers should focus their discussion on applicants who have ranked in Quality Group 1 (QG1) and Quality Group 2 (QG2); applicants outside of QG1 and QG2 can also be proposed for further consideration, but these should be applicants where there are suspected score anomalies.
 - Reviewers should discuss methods of voting to include but are not limited to:
 - A show of hands
 - Private Zoom chat to the Chair
 - Digital polls or surveys
 - Reviewers will rank applicants in the following QG's:
 - QG1 are eligible for awards.
 - QG2 are alternates. If any applicants in QG1 decline an award, the award will be offered to those in QG2 based on the finalized QG2 rank order.
 - QG3 receive Honorable Mention. (There is no QG3 for postdoctoral applicants.)
 - QG4 do not receive recognition.
2. The Panel Assistant will open and screen share the Deliberation Roster.
 - QG1:QG2 ratio is 1:1; number of recipients in QG3 can be adjusted.
 - The default ranking is **score average**, which excludes outliers.

- The Chair can request other views which include:
 - Score average with outlier included.
 - Average of reviewers' ordinal rank values, which includes the ordinal rank of outlier reviews.
- 3. Reviewers should identify to the Panel Assistant via private Zoom chat any names of applicants not listed in QG1 and QG2 whom they believe should be **considered for an award**.
 - The Chair should remind reviewers that these should only be applicants with score anomalies and only 1-2 applicants total.
- 4. The Panel Assistant will share the list of all names of any additional applicants with reviewers via Zoom group chat.

Deliberations Mechanics:

1. Identify reviewers to speak briefly for each application in QG1, the top half of QG2, and any additional applicants that have been proposed for further consideration of an award that are not in QG1 or QG2. Discussion should focus on the qualities of the application that make it competitive for an award according to the competition criteria.
 - Based on review of scores and discussion, build consensus among the panel of the most competitive applicants for being awarded according to the competition criteria.
 - Consensus of the panel can be confirmed through motions can put forward to:
 - Movement of applicants in, out, or between QG1 or QG2
 - Movement of any additional applicant(s) proposed for further consideration for potential inclusion in QG1 or QG2
2. Request if reviewers have any motions to re-order QG1 including any additional applicants that were proposed for further consideration from other QGs.
 - If there is a motion, give reviewers additional time to ask questions or make a case for the applicant.
 - Time should be limited to 10 minutes total if possible.
 - Hold vote(s) as a panel on any motions.
 - Repeat as needed until panel consensus is reached on the final order of the applicants in QG1.
3. Once QG1 is finalized, request if reviewers have any motions to re-order the top half of applications in QG2 including any additional applicants that were proposed for further consideration.
 - If there is a motion, give reviewers additional time to ask questions or make a case for the applicant.
 - Time should be limited to 10 minutes total if possible.
 - Hold vote(s) as a panel on any motions.
 - Repeat as needed until panel consensus is reached on the final order of the applicants in QG2.
4. Record a vote on the final order of applications in QG1 and QG2. The Panel Assistant can then make modifications to the order to reflect the final consensus of the panel.
5. Chairs can request funding for additional awards in the **Chair Certification** comment box.
 - Chairs can also direct the Fellowships Office not to offer an award to an alternate if one becomes available.
 - In small panels with few applicants:
 - There may not be awards allocated for all levels. Chairs are encouraged to use the Chair certification process to request awards for highly competitive applicants that should be awarded.
 - Awards do not need to be offered if there are no outstanding candidates.
 - Chairs can change the size of QG3 (Honorable Mention), but not QG2.

Certification:

1. The Panel Assistant will begin the certification process.
2. The Chair will enter any comments then check the box and save to finalize.
3. The Chair will confirm with the Panel Assistant that the certification has been received.

Debriefing:

1. When all levels have been completed, solicit feedback and suggestions from the reviewers on the process. Chairs can share the feedback at the Chairs debriefing session.
2. Remind reviewers they will receive a link to a feedback form where they list persons who should receive letters of appreciation for their service.
3. Allow the Panel Assistant to share closing remarks/reminders including reminders to:
 - Delete/shred application/review-related materials.
 - Confirm reviewer profile information is current.
 - Thank all reviewers for their service!