The Panel Review Process

FALCON
November 3, 2018

Jeff Jacobsen, Executive Director, NCRA
Past Panel Manager

Tim Conner, Director
Division of Bioenergy, NIFA
“Real integrity is doing the right thing, knowing that nobody's going to know whether you did it or not.”

Oprah Winfrey
Every step of the process is based on Integrity – first and last

Presentation Topics:
• Evaluation Criteria
• Role of Panel Managers and Panelists
• Panel Types - In Person or Virtual
• The Review Process
• Volunteering to Serve as Panelists
• Anything on Your Mind!!!
Evaluation Criteria

- Peer Review Process
- Program Evaluation Criteria in RFAs
  - Scientific Merit
  - Qualifications of the Project Team
  - Institutional Capability and Availability of Facilities
  - Project Planning and Management
  - Relevance to Agriculture and Program Priorities
- Program Description in RFAs
Role of the Panel Manager

- Temporary NIFA Employee to Manage the Process
- Selects Panelists who are active in Education, Extension or Research
  - Not submitting to program
  - Expertise, Ethnicity, Gender
  - Blend of Experience with Panel Reviews
  - Institutional Affiliation (public, private)
  - Geographic Distribution
  - Professional Rank or Title
- Considerations – COI, Confidential, Research Misconduct, Implicit Bias, Respect
- Processes – Structured, Timely, Repetitive, Solicit All Voices
- Assign Proposals and Monitor the Review Process
- Guide, Orientation, Training
- Read All Proposals
- Conduct Panel Review, Debrief Panel, Report to NIFA Administrator, Review Panel Summaries, Written Report
- NO OPINION ON PROPOSALS
Role of the Panelists

• Understand Program Purpose and Evaluation Criteria
• Read Assigned Proposals (primary, secondary, tertiary)
• Conduct Independent, Individual Reviews
  • Prepare Written Summary and Rating
• Review Other Assigned Panelist Reviews
• Read All Proposals (as time allows)
• Actively Participate in the Panel Discussions
• Contribute to the Written Panel Summary

Note: Panelists selected (who) and panel discussions (what) are confidential !!!
Panel Types – In Person (seated) or Virtual

• In Person Panels
  • Historically the Norm
  • Travel to and from
  • Removed from “Home”
  • See and Feel the Discussions
  • Networking

• Virtual Panels
  • USDA Goal Alignment
  • Reduced Costs, Environmental Footprint, Easier for Panelists, Panelist Surveys, Literature
  • Rigor and Quality Consistent with In Person Panels
  • Time Zone Differences
  • Potential Distractions – Drop In Visitors, Phone, Teaching, Technology
Review Process

- NIFA Peer Review System (PRS)
- Individual Reviews, Written Summary, Rating
- Review Team Reviews
- Discussion with Primary, Secondary, Tertiary, Others
- Consensus Positives, Negatives and Overall Synthesis
  - Overall Rating and Ranking with “Placement on Board”
  - Panel Team Written Summary
- All Proposals Initially Ranked – then Final Re-ranking

Note: Specific Panel discussions of individuals are confidential !!!
Volunteering to Serve

• Secure Support from Institutional Administrator
• Contact Relevant NIFA National Program Leader
• Have a Current Presence on the Web
• Talk to Colleagues who have Served
• Benefits: Improved Successful Grant Applications
• When asked, communicate and do an excellent job!!
Questions??????