

Checklist for Advisory Panel Organizers

Before the Panel: Find at least Two Consumer Representatives

- Establish criteria for consumer representatives:
 - Demographics
 - Disease-specificity, if relevant
 - Knowledge of evidence-based healthcare
 - Knowledge of advisory panel process
 - Not tied to industry
 - At least two consumer representatives per panel
- Reach out to CUE or other consumer networks with a description of the opportunity
- Keep a record of all consumers with whom your organization partners:
 - Include their names, organization name, and contact information

Before the Panel: Prepare a Consumer-Friendly Environment

- Provide all panel members with:
 - Timeline of future meetings
 - Roles and responsibilities of each panel member
 - Conflict of interest statement
 - Glossary of relevant clinical terms
 - Payment and/or reimbursement information
 - Clear expectations in terms of work, time, and knowledge
- Create or use:
 - Manual of policy and procedures for guideline development
 - Resources and/or training on interpersonal skills
- Call all representatives as a group before the first meeting to discuss advisory panel process and answer questions

During the Panel: Ensure Consumer Engagement

- Allow sufficient time for consumer introductions, and elicit from everyone:
 - Personal and professional experience
 - Rationale for involvement
 - Desired contribution to panel
- Emphasize that perspectives from all stakeholder groups are equal and important
- Facilitate communication among potential allies on the panel by identifying members who can support one another's stakeholder role
- Encourage equal treatment in naming conventions when panel members address one another (e.g., all panel members use first names)
- Encourage participation from reticent consumer representatives by asking questions
- Provide positive reinforcement when consumers contribute to the discussion
- Discourage interruption of one panel member by another
- Establish an anonymous, democratic voting mechanism in which the consumer votes have equal weight with that of other stakeholders
- Provide open access resources to all panel members during the advisory panel process

After the Panel: Support Future Consumer Engagement

- Maintain ties with consumer representatives by creating a follow-up or check-in schedule

