CONSUMERS UNITED FOR
EVIDENCE-BASED HEALTHCARE

I. Identification of consumer representative
1) Establish criteria for consumer representative (e.g., consumer should be from a particular demographic; with a particular disease, with knowledge of evidence-based healthcare and/or the guideline development process, not tied to industry) 2) Reach out to CUE or other consumer network with a description of the opportunity 3) Keep a record or log of all consumers with whom your organization partners. Include their name, organization name, and contact information 4) Maintain ties with consumer partners by creating a follow-up or check-in schedule

II. Preparation

1) For all panel members, provide:
   a) Timeline - list length of commitment, scheduled advisory panel meeting dates and locations
   b) Roles and responsibilities – list the expected tasks of each panel member
   c) Conflict of interest statement
2) Panel organizers should create/use:
   a) A manual of policy and procedures for guideline development
   b) A log of scheduled advisory panel meetings
   c) Resources and/or training on interpersonal skills for all panel members
3) Chair should call patient members ahead of time to discuss advisory panel process one-on-one
4) Chairs should establish and implement a plan for consumer engagement:
   a) Bring consumers into discussions
   b) Ask consumers questions
   c) Make space for consumers during each discussion

III. Consumer engagement

1) At first meeting (in-person, if possible), leave time on the agenda for consumer/patient introduction. Consumers/patients should describe:
   a) Personal and professional experience
   b) Why they decided to get involved
   c) What they hope to bring to the table
2) Establish a mechanism for fair voting
   a) Make voting anonymous and equal among panel members
3) Provide open access resources to all panel members for the duration of the advisory board process
   a) CUE's "Understanding Evidence-based Healthcare" course (for consumers): http://us.cochrane.org/understanding-evidence-based-healthcare-foundation-action
   b) G-I-N Toolkit (for health professionals and panel organizers): http://www.g-i-n.net/working-groups/gin-public/toolkit
   c) IoM Standards (for consumers, health professionals, and panel organizers): https://www.nationalacademies.org/hmd/Reports/2011/Clinical-Practice-Guidelines-We-Can-Trust.aspx