# 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