

Guidelines for the development of ERS Task Forces

1. Introduction

The ERS contributes to the coordination of activities in respiratory medicine across Europe, by encouraging new initiatives, producing guidelines for European and developing joint documents with other major associations and/or international scientific societies.

The ERS sponsors Task Forces in various fields of respiratory medicine. It is intended that such Task Forces produce position papers, statements or clinical practice guidelines that then are adopted as official ERS documents on issues related to respiratory medicine.

Proposals for Task Forces can be made by a member of the ERS or they may be initiated by the Executive Committee. Patient organisations working with the European Lung Foundation (ELF) may also suggest potential topics for consideration.

2. Types of documents

2.1 Clinical practice guidelines

Clinical practice guidelines are statements that include recommendations, strategies or information to help physicians and/or other healthcare practitioners and patients make decisions about appropriate measures of care for specific clinical circumstances. Necessary elements of the development are 1) a multidisciplinary development process with a representative guideline development group, 2) a comprehensive and systematic literature review for identification of evidence, and 3) grading of the evidence and the degree of recommendations. Methodological guidance is available from the ERS. For further details and information on the required methodology, please refer to the “Methodology” section. Patient input options are also available. Please contact the European Lung Foundation (pippa.powell@europeanlung.org) for further information.

2.2 Statements

Statements are comprehensive scientific reviews of a topic by a group of experts. The focus of a review may be a disease entity, a research issue, a public health topic, a diagnostic or therapeutic approach to a disease or a set of related disorders, or other issues of interest to the ERS. All statements are based on a body of reliable scientific evidence identified by systematic searches and documented by references or data supporting the conclusions. They should be descriptive of the current situation and cannot contain recommendations for clinical practice. Patient input options are also available. Please contact the European Lung Foundation (pippa.powell@europeanlung.org) for further information.

2.3 Technology reviews, assessments and standards

Technology reviews, assessments and standards are statements that review or assess technologies or present recommendations for technology standardisation. Examples are standards for performing pulmonary function tests and reviews of technologies such as mechanical ventilators or non-invasive ventilator devices. Documents that emphasise the application of these technologies to patient care rather than the assessment of the technology itself are better characterised as clinical practice guidelines or statements.

2.4 Workshop summaries and conference proceedings

Workshop summaries and conference proceedings are documents that report the proceedings of conferences and workshops sponsored or organised by the ERS.

3. Application

The application form is available on the ERS website: <http://www.ersnet.org/ers-funding/task-forces.html>. Applications must be submitted according to the deadlines defined below.

3.1 Task Forces initiated by a member of the ERS

Proposals can be made by a member of the society who is an expert in the particular topic of the Task Force. Applications are submitted on the appropriate form and reviewed by the ERS Science Council, which asks three reviewers to comment on the application, one of whom can be the relevant Assembly Head. The recommendation to proceed is made by the Science Council, which may change the budget requested and make recommendations on membership of the Task Force and methodological considerations.

3.2 Task Forces initiated by the ERS Executive Committee

The ERS Executive Committee may, on occasion, appoint one or two chairs who will be responsible for selecting the expert members and who will write the application. Applications are reviewed by the ERS Science Council, which asks three reviewers to comment on the application, one of whom could be the relevant Assembly Head.

3.3 Approval of Task Forces

A final decision on whether to proceed with a Task Force proposal is made by the Executive Committee after examination of the Science Council's recommendation.

3.4 Task Force application deadlines

Task Force applications are reviewed by the ERS at the following times each year:

1. February 01 (a response can be expected in May of the same year)
2. June 01 (a response can be expected in October of the same year)
3. October 01 (a response can be expected in February of the following year)

3.5 Conflicts of interest

The ERS requests that the Task Force chairs and at least 50% of the Task Force members disclose their potential conflicts of interest at the time of the application. The ERS conflict of interest form for Task Forces is available at the end of the application form. The forms, fully completed and signed, should be submitted with the Task Force application.

Upon approval of the project, the Task Force chairs must collect and forward to the ERS office, **within four weeks**, any conflict of interest forms from Task Force members not provided with the original application.

Furthermore, the ERS requests that Task Force chairs and other Task Force members proactively report any conflict of interest they may have should their situation change during the development of the Task Force.

3.5 Confidentiality Agreement

The ERS requests that all information related to the content and development of a Task Force is kept strictly confidential until completion of the reviewing of its Final Document. Members and Chairs are requested not to disclose any information on the Task Force to any third party not directly involved.

All Task Force members will be asked to complete and sign a Confidentiality Agreement within four weeks after approval of the project and send it to the ERS Office. It is the Task Force Chairs' responsibility to provide their members with the form to be completed and ensure that all members fill it in.

The Chairs of the Task Force will be notified in writing by the ERS Office once the Confidentiality Agreement no longer applies.

4. Project development

Applicants whose proposals are approved will receive a notification letter by email that will describe the terms and conditions of their project funding.

4.1 Key points related to the project development

Funding for Task Forces is not to be considered an ERS grant, but funding that the ERS has earmarked for a **two-year period** to cover the routine expenses of project development. Renewal of projects anticipated to extend beyond two years must be approved annually.

Funding for ERS supported projects will be managed by the ERS office in Lausanne.

- All expenditure charged to the ERS project accounts must be approved by the Science Council or the ERS office. For Task Force meetings, expenditures must comply with the attached ERS policy on expenses.
- All meetings and conference calls should be scheduled through the appropriate ERS department.
- Any substantial changes in the goals, strategy or the budget of a project must be approved by the ERS Science Council.
- If projects are to be considered jointly with other organisations, official contact must be made through the ERS office with the relevant organisation and an agreement outlining the major issues must be established in accordance with ERS policies.
- If necessary, administrative support for the project can be provided by the appropriate ERS department.
- All official ERS policies, including the ERS policy on publications, ERS guidelines for conflict of interest, ERS bylaws, ERS CME policy, ERS website guidelines and other relevant policies must be followed during all phases of the project.

5. Methodology

Applicants for Task Forces aiming to produce **clinical practice guidelines** are asked to include in their application a detailed description of the methodology they intend to use, particularly regarding formulation of questions, systematic review of the literature, grading of evidence and of recommendations. The ERS requires that all guidelines are evidence-based and follow strict methodology. For this purpose, it is strongly suggested that the GRADE approach is used. The ERS is, however, open to discussion regarding the use of alternative evidence-based grading systems, as long as the Task Force applicants can justify that it is more appropriate than GRADE.

To ensure a high level of methodological rigor, it is required that Task Forces aiming to produce clinical practice guidelines include members experienced in Guideline Development (mainly in conducting systematic reviews and preferably also using the GRADE approach). These persons (up to 4) should be clearly indicated on the application form, and his/her knowledge should be demonstrated by either reference to relevant publications or work/research experience. They do not necessarily need to have a scientific background in the area of the Task Force and can be working in the field of evidence-based medicine. Additional funds to cover their contribution in the systematic review can be included in the application form, under the appropriate section.

The ERS also has an in-house methodologist who can assist in the process of producing guidelines. Upon submission, your application will be reviewed for methodological consistency. Should your application be accepted, you will have an initial telephone discussion with the ERS methodologist, during which the methodological requirements for your project will be discussed. The ERS methodologist will be available for consultation throughout the duration of your Task Force (for example on formulating questions, grading the evidence, etc.). The ERS methodologist will not conduct literature searches or grade the evidence for you. Staff support and related additional funds for methodology can, however, be included in the application form, under the appropriate section.

Table: Summary of what the ERS in-house methodologist can and cannot do:

Yes	No
Initial consultation on the right methodology for the project and the steps required	Literature searches
Help with formulating questions	Data management, data extraction
Regular contact and support to the Task Force member responsible for the methodology throughout the duration of the project	Compiling evidence tables (help could be provided to ensure consistency between guidelines)
Provide teaching sessions for Task Force members, in order to assist them with applying the GRADE approach	Grading of the evidence (help could be provided to ensure consistency and quality)

6. Rule for Task Forces

6.1 Duration

The Task Force will have a limited duration not exceeding two years. Unless a request for extension is submitted and agreed by the ERS Executive Committee, it will be dissolved after its appointed term and the budget cancelled.

6.2 Kick-off teleconferences

Upon approval of the Task Force by the ERS Science Council and Executive Committee, a kick-off teleconference will be organised with the Task Force chairs, the ERS Guidelines Director, and the ERS methodologist and staff.

6.3 Progress reports

The Task Force chairs are asked to complete a progress report every six months. This report aims to provide the ERS with:

- A summary of the work performed
- A listing of the steps remaining before completion of the Task Force
- A report of any encountered issue that might prevent the completion of the Task Force within two years.

The progress report template is available on the ERS website. Reports will be examined by the ERS methodologist and the Guidelines Director.

6.4 Meetings

Meetings should be scheduled at the ERS International Congress, but, if required, one meeting (or, exceptionally, two meetings for the full duration of the project) between annual congresses is acceptable. Meeting facilities exist at the ERS headquarters in Lausanne. Staff support can be provided if the meeting is held the ERS headquarters.

Any meetings should be announced to the ERS office as soon as a date is fixed by the Task Force chairs and no later than four months prior to the meeting date.

6.5 Meeting logistics

There are three options for meetings:

- a. *Meetings during the ERS International Congress*: Upon request from Task Force chairs, the ERS will provide a meeting room and standard catering (coffee breaks and sandwich lunch) for the Task Force group. This only applies for on-going Task Forces that have formally been approved by the ERS. Catering will be provided only if a request is made in the Task Force application form and approved by the Science Council. The costs will be covered by the Task Force budget. Meeting room requests must be made through the ERS Scientific Activities Department (scientific@ersnet.org).
- b. *Meetings at the ERS headquarters (Lausanne, Switzerland)*: The ERS can provide meeting room facilities for up to 20 people in its headquarters located in Lausanne, Switzerland. The ERS headquarters is easily and quickly reachable from Geneva airport by train, which makes it an ideal meeting location. If Task Force chairs wish to have their meeting held in Lausanne, they should contact the ERS office.
- c. *Meetings in another location*: Task Forces can also hold their meetings in locations other than the ERS headquarters, in which case no assistance will be provided by the office with regards to meetings logistics, except for flights, which have to be booked through the **ERS official travel agency**. Task Force chairs will have to negotiate

contracts with the hotels directly. Travel expense reimbursement must be requested to the ERS by each Task Force member using the appropriate travel and reimbursement form.

6.6 Funding

ERS Task Force funding cannot be used to cover meeting expenses during or in relation to the ERS or ATS Congresses (travel, registration or accommodation). Funding can only be used for meetings organised between the congresses. Exceptions may be considered for Task Force members outside the respiratory field (for statisticians, etc.). ERS Task Force funding should serve to cover travel expenses as well as hotel expenses (room and breakfast only). As a rule, hotel expenses (including breakfast) should not exceed 150 euro per person per night. For meals, a per diem allowance of up to 50 euro maximum per person can be claimed. Industry-sponsored dinners are not acceptable. No entertainment should be covered by ERS funds. The complete ERS policy on expenses for ERS Task Force meetings is attached to this document. Please read it carefully. All Task Force members and chairs will be required to comply with this policy. Claims for reimbursement of expenses must be accompanied by the relevant receipts. **Only requests complying with the ERS policy on expenses in use at the time of the meeting will be accepted and reimbursed.**

6.7 Joint Task Forces with other organisations

Mention should be made by the applicants of the desirability (if any) of establishing collaboration with other organisations and of the proposed outcome of the project, i.e. to develop an ERS statement or position document, publication in a journal of one of the societies, a session at the ERS International Congress, or other. If collaboration with another organisation is approved, a written agreement will be signed by all parties. This will include details of how the expenses will be shared and how and where the reports of the Task Force will be published.

If the Executive Committee considers that the objective has not been achieved, it has the right to nominate a new chair or Task Force member with immediate effect.

6.8 Junior ERS member

The ERS is fostering education of its junior members. For Task Forces aiming to producing a Guideline, the ERS Guidelines Working Group recommends the involvement a Junior ERS member who will join the panel of experts and gain experience in Guidelines development.

His/her role will be:

- Perform the systematic review and grading of the evidence for at least one PICO question under the guidance of the ERS Methodologists.
- Actively participate in one or more scientific group(s) of the TF (in agreement with the Task Force Chairs).
- Reporting role: if the ERS methodologist cannot attend a meeting, the junior will be in charge of reporting to him/her any question or issue addressed by the Task Force members. If appropriate, he might also be asked to update the Guidelines Working Group on the Task Force's progress.

The Junior TF member may also help the *Dissemination Adviser* with the Guidelines dissemination and implementation (e.g. identifying events where the guidelines could be

presented, preparing a poster or a slides kit, contributing to the development of an App, etc) at a later stage of the Guidelines development.

The Chairs of the Task Force can suggest a junior in the application form. His/her nomination will then be considered by the Guidelines Working Group for endorsement. If no proposal is made by the Chairs, the Guidelines Working Group can directly appoint a junior, with the help of the ERS Junior Committee, and in agreement with the Chair.

7. Final documents and publications

7.1 Document format

The Task Force is expected to publish position papers, statements or guidelines in the European Respiratory Journal (ERJ), or, if appropriate or part of another agreement, in another journal. In principle, the European Respiratory Journal offers 8–10 printed pages or 8000 words (maximum 15 printed pages) per Task Force free of charge. If larger publications are required the applicants must make prior arrangements for other forms of publication and arrange funding.

More detailed information regarding the preparation of manuscripts for publication in the European Respiratory Journal can be found at erj.ersjournals.com/site/misc/ifora.xhtml

7.2 Document endorsement

a) For ERS Task Forces to be published in the ERJ

The final document must be pre-approved by the Science Council Chair, the Guidelines Director and the relevant Assembly Head(s) before being reviewed. Once the document has been pre-approved, the peer-reviewing process can be initiated through the online submission platform of the ERJ, ScholarOne Manuscripts (mc.manuscriptcentral.com/erj). It is the chairs' responsibility to upload the Task Force document to the submission platform and to identify it as an ERS Task Force document. When the reviewed document is accepted for publication by the ERJ, the Guidelines Director presents the document to the Science Council and Executive Committee for endorsement. The revised manuscript and reviewers' comments are included in the working documents presented to the Science Council and Executive Committee. Following endorsement by the Executive Committee, the document is published by the ERJ as an official ERS document.

b) For joint Task Forces with another society/organisation

The final document must be pre-approved by the Science Council Chair, the Guidelines Director and the relevant Assembly Head(s) before being reviewed by three reviewers and presented for endorsement to the ERS Science Council and Executive Committee. Once the document is endorsed by all the societies involved, the manuscript is submitted to ERJ for publication – or to another journal if agreed by the Science Council beforehand. A second reviewing might be performed by the journal before publication.

Task Force documents are not automatically published and eventual publication is purely an editorial decision

7.3 CME questions, slide kit and lay summary

In addition to the final document, the Task Force is required to provide the following additional documents:

- a. *CME questions*: a set of 5–8 CME questions (and answers) must be provided to the ERS in order to be used on the ERS E-learning website.

b. *Slide kit*: a slide kit summarising the work achieved by the Task Force must be provided to the ERS.

c. *Lay summary*: finally, a lay summary must also be provided to the ERS.

These additional documents must be provided along with the final document when it is ready for publication. They can be used by the ERS on their ERS websites and by-products with unrestricted rights.

8. Public and patient involvement

The Science Council recognises that patient and public input into Task Forces is desirable when appropriate and may help to:

- underpin guidelines and statements with patient experience,
- highlight areas where the patient's perspective differs from that of health professionals,
- ensure that guidelines and statements address key issues of concern to patients or that may be overlooked by healthcare professionals,
- provide input from a number of European countries to increase the transferability of guidelines and statements to different settings,
- to gain access to hard to reach patient populations, or
- optimise patient engagement and compliance with the resulting guideline or statement.

ELF would welcome contact from any Task Force group keen to investigate ways that patient input could enhance their work. They have expert experience of patient input and an established network of patient organisations across Europe, with access to patients, carers and advocacy groups, who are keen to support Task Force activities.

Options include a patient-focused literature review, patient consultation (including surveys and focus groups) and the development of a patient version of the outcome document.

ERS Policy on Expenses

for ERS Task Forces

1. The ERS requires that Committee Members and Meeting Participants book via HRG (ERS Official Travel Partner) to attend Standing Committee Meetings and/or the above mentioned events. For low cost carriers members/meeting participants are asked to book their own flights.

If HRG is not to be used, ERS and HRG must be notified within two (2) weeks of the date of the invitation. ERS will only reimburse an amount up to the equivalent of the price quoted by HRG two (2) weeks after the invitation was issued.

ERS covers only the economy flight from the hometown to the meeting destination and return. ERS will cover the cost of other itineraries up to the equivalent of the price quoted by HRG for the return flight from the hometown to the meeting destination, two (2) weeks after the invitation was issued. If the preferred routing costs more, the committee member shall make the reservations him/herself and submit a request for reimbursement. Any cost supplement (flexible ticket, business class, etc.) will not be borne by the ERS.

Once the flight ticket has been issued, any additional costs (flight rebooking, etc.) will only be covered by the ERS in exceptional circumstances such as death or serious illness of an immediate family member. Should it be necessary to change or cancel a flight for any reason, please contact the ERS Office beforehand.

Committee Members are required to be present for the entire period of a committee meeting and travel is to be scheduled accordingly. As stated in Article V 13, repeated failure to attend an official committee meeting without prior notification to the office or for a major reason can result in the replacement of the officer concerned.

2. Expenses for lounge access (airports, train stations, etc.) will not be borne by the ERS.
3. Personal vehicle transportation to the nearest train station or airport will be reimbursed on a basis of € 0.45 per kilometre (to a maximum of 120 km each way). Parking fees are limited to € 50 only. A maximum of € 50 each way will be reimbursed for private hire transport or taxi to the nearest train station or airport.

Please note that if you wish to travel by car to your meeting destination, you will NOT be reimbursed per kilometre. Reimbursement will be on the basis of the cost of a first class return train ticket from the hometown to the meeting destination.

4. When organised through the ERS Office, hotel accommodation and daily breakfast in a designated restaurant will be prepaid by the ERS directly.
5. Incidental expenses such as mini-bar, other bar bills, room service, room service breakfast, laundry and personal phone calls will not be paid by the ERS.
6. The ERS will cover the cost of the hotel accommodation needed to attend all meetings in which the officer/meeting participant is involved (member or official observer/participant) plus one night where it is impossible to arrive in time for the meeting or impossible to return home the same day, following the meeting.

It is very important that any exceptions to these rules are approved in advance by the ERS Office concerned or they will not be reimbursed.

As a rule, hotel expenses for Task Force meetings should not exceed € 150 per person per night (bed and breakfast only).

7. The ERS will refund internet access costs for the duration of the time you are at the meeting, based on a receipt of the costs.
 8. As a rule, catering cannot exceed € 50 per person and per day. Reimbursement will only be effected where original receipts are supplied.
 9. All expenses should be reported and all original receipts and bills sent with the travel expense form attached to this document. Submission of only credit card slips without valid receipts will not be recognised.
 10. Travel expense forms must be submitted within 6 months after the meeting, i.e.:
 - Meetings taking place after the Congress
 - o Expense claims can be submitted up until the Spring Meeting (including on-site during the Spring Meeting).
 - Meetings taking place after the Spring meeting
 - o Expense claims can be submitted up until the Congress (including on-site during the Congress).Travel expense forms submitted after this 6 months delay will not be considered.
- ✓ Please keep a copy of all documents until the reimbursement has been transferred to your bank account.
 - ✓ Unusually large claims will be referred to the Treasurer for individual approval.

Finally, if an unusually large expense is anticipated, please contact the ERS to discuss this in advance.