ERS EUROPEAN RESPIRATORY SOCIETY
every breath counts

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ERS Task Forces for the development of ERS clinical practice guidelines, statements and technical standards – Rules and application form 2019

1. Introduction

The ERS contributes to the coordination of European activities in respiratory medicine and provides funding to task forces intended to produce clinical practice guidelines (CPG), statements and technical standards. These documents are then adopted as official ERS documents on issues related to respiratory medicine.

Proposals for the development of an ERS CPG, statement or technical standard can be submitted by an ERS member or 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 (CPG)

Clinical practice guidelines (CPG) are documents that include recommendations for clinical practice. They aim to provide physicians, healthcare practitioners and patients with information and strategies that will help them 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 following the GRADE methodology. Methodological guidance is available from the ERS. For further details and information on the required methodology, please refer to the section 5 “Methodology clinical practice guidelines”. Patient input options are also available. Please contact the European Lung Foundation (info@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 evidence as well as the current clinical practice. They do not require grading of the evidence and they 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 Technical standards

Technical standards are documents 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 (e.g., their indications) rather than the assessment of the technology itself are better characterised as clinical practice guidelines or statements. For more information, see also the frequently asked questions on our website.

3. Submission, reviewing and selection

The application form is available on the ERS website: https://www.ersnet.org/research/task-forces. Applications must be submitted according to the deadlines defined below.

3.1 Proposal submitted by a member of the ERS

Proposals can be made by an ERS member who is an expert in the topic of the project. Applications are submitted on the appropriate form and reviewed by the ERS Science Council, which asks a minimum of three reviewers to comment on the application, one of whom can be the ERS corresponding Assembly Head. The recommendation to proceed is made by the Science Council, which may nevertheless require modifications in the project.

3.2 Proposal submitted 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 submit the application. Then, as for proposals submitted by members, applications are reviewed by the ERS Science Council, which asks a minimum of three reviewers to comment on the application, one of whom could be the corresponding Assembly Head.

3.3 Application deadlines

The deadlines for submission of applications are the

- February 01 (a response can be expected in May of the same year)
- June 01 (a response can be expected in October of the same year)
- In July for joint ERS/ATS proposals (a response can be expected in December of the same year)

3.4 Approval

The reviewing of applications is managed by the Guidelines Working Group, which proposes a recommendation to the Science Committee. The final decision to accept or not a proposal is made by the Executive Committee after examination of the Science Council's recommendation.

4. Panel of experts

ERS CPGs, statements and technical standards are managed by the chairs (usually limited to 2). They are responsible for the smooth development of the project which includes compliance with the ERS rules and timelines. They are the designated contact point with the ERS Guidelines Director and staff.

The ERS recommendation concerning the panel for CPGs, statements and technical standards of expert are the following:

- Panels should not exceed 15 members
- Supplementary experts can participate as external consultants if needed.
- Panels should be multidisciplinary and encompass all the required areas of expertise for the completion of the document, thereby being representative of the various disciplines, professions and stakeholders involved in the considered topic
- Panels should be pan-European, the predominance of one or two countries is discouraged
- The inclusion of non-European experts is accepted but should not exceed 10-20% of the overall panel
- Panels should be gender and age-balanced, the inclusion of at least one early-career member is encouraged
- The inclusion of 1 or 2 patient representatives with an advisory role is encouraged whenever appropriate
- For CPGs, the ERS strongly encourages to include in the panels experts experienced in systematic reviews and the GRADE approach

The ERS fosters education of its early-career members. As a result, the ERS Guidelines Working Group encourages the chairs to involve at least one junior ERS member in the panel of experts. For task forces aiming to produce a CPG, it is recommended that the early-career ERS member has previous experience in systematic reviews.

The early-career task force member's role will be:

- Actively participate in one or more scientific group(s) of the task force (in agreement with the chairs).
- Support the chairs in the overall management of the project (e.g. planning meetings and TCs, collating and synthesizing the production of subgroups, ensuring that the agenda of each meetings and the global timelines are followed, writing interim or meetings' reports)
- Perform the systematic review and grading of the evidence for at least one PICO question under the guidance of the ERS Methodologists (for CPGs only).
- Contribute to 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 a summary etc.) at a later stage of the guidelines development.

The chairs are encouraged to suggest an early-career member in the application form. If no proposal is made by the chairs, the Guidelines Working Group can suggest an early-career member, with the help of the ERS Early Career Member Committee (ECMC).

5. Methodology for clinical practice guidelines

Applicants 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.

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 in using the GRADE approach and the evidence to decision framework. These persons (up to 4) should be clearly indicated on the application form, and their 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 any external methodological support (for example for literature searches) can be included in the application form, under the appropriate section. These funds cannot cover the work of the task force panellists.

The ERS also has in-house methodologists who can assist in the process of producing guidelines. Upon submission, each application is reviewed for methodological consistency. Should the application be accepted, an initial telephone discussion with one of the ERS methodologist will take place, during which the methodological requirements for the project are discussed. One of the ERS methodologists will be assigned as the lead methodologist and he/she will be available for consultation throughout the project. The ERS methodologist will not conduct literature searches, statistical analyses or grade the evidence, but will oversee the entire process of guideline development. Staff support and related additional funds for methodology can, however, be included in the application form, under the appropriate section.

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

Yes	No
Initial consultation on the right methodology for the project and the steps required	Literature searches
Help with formulating questions in the PICO format	Data extraction, data management, statistical analyses
Regular contact and support to the task force member responsible for the methodology throughout the duration of the project	Compiling evidence tables (support 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 (support could be provided to ensure consistency and quality)

6. Development

6.1 Duration

ERS task forces aiming to develop a CPG, statement or technical standard have a limited duration of **two years**.

6.2 Start of the project

Applicants whose proposals are approved will receive a notification by email that will describe the terms and conditions of their project funding. The project is initiated directly after receipt of the acceptance letter by the chairs.

6.3 Kick-off teleconferences

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

6.4 Progress updates

The ERS requires that progress updates are provided to the ERS Office as follows:

Time after approval	Update requested
6 months	Update by email stating that the Task Force has properly been initiated and that the first meeting/teleconference(s) took place or are scheduled
1 year	A comprehensive report on the work achieved and a timeline including the remaining steps until completion of the project
18 months	A brief update on the 1-year report to be provided by email
2 years	Final deadline to complete your Task Force

At the beginning of the project, chairs will be asked to develop a precise timeline with milestones (example available here) If the expected deliverables are not provided by the end of the first year, the ERS Science Council and Executive Committee reserve the right to terminate the project.

For CPGs, an intermediate teleconference will take place after completion of the 1-year report in order to discuss the progress of the task force with the ERS Guidelines Director and methodologists.

7. Meetings

Meetings should be scheduled at the ERS International Congress, but, if required, the organisation of a maximum of 1 external meeting for the full duration of the project is acceptable. External meetings can either take place at the ERS Headquarters (HQ) in Lausanne, Switzerland, or at another location chosen by the chairs. Any meetings should be announced to the ERS office as soon as a date is fixed and no later than four months prior to the meeting's date.

7.1 Meetings at an ERS Congress

Upon request from the chairs, the ERS will provide a free meeting room located within the congress centre. Basic catering may be provided if budget is available. Financial support for travel and accommodation is not provided for meetings held at an ERS Congress. Few exceptions may be considered for panellists who will travel to the congress only to take part in the task force meeting without attending the rest of the event.

7.2 Meetings at the ERS Headquarters (HQ):

The ERS can provide meeting room facilities for up to 20 people in its HQ located in Lausanne, Switzerland. The ERS HQ is easily and quickly reachable from Geneva airport by train, which makes it an ideal meeting location. For meetings held at the ERS HQ, the ERS office can provide logistical support which includes:

- Sending of invitation to the participants
- Travel arrangements through the ERS official travel agency, according to the ERS Travel Policy
- Organising the participants' accommodation
- Organising the catering

7.3 Meetings at another location chosen by the chairs:

Meetings may also be held at a location chosen by the chairs, in which case no assistance will be provided by the ERS office with regards to meetings logistics, except for flights, which have to be booked through the ERS official travel agency. The chairs will have to negotiate contracts

and payments with the venue and hotel directly. Travel expense reimbursements must be requested to the ERS by each member using the ERS online reimbursement system. The ERS travel policy available on pages 10-11 applies.

8. Funding

Budget for the development of the document 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 the development of the document. The chairs are responsible for ensuring the approved budget is not over-spent. The ERS can rightfully refuse to reimburse travel, accommodation or catering costs if this would be the case.

Funding to develop an official ERS CPG, statement or technical standard can be requested for:

- Meetings' organisation
- Methodological support
- Administrative support
- Other (for instance teleconference or technical needs)

8.1 Funding for meetings' organisation (see item 7 "Meetings" for more information):
With the exception of catering, the ERS' funds cannot be used for meetings held at an ERS or other society's Congresses or events. For meetings at an ERS congress, a room will be provided free of charge. No travel, accommodation or registration financial support will be provided to the panellists attending the meeting. Few exceptions may be considered for panellists who will travel to the congress only to take part in the task force meeting without attending the rest of the event.

For meetings not organised as part of an ERS Congress (maximum 1 for the full duration of the project) funding provided by the ERS would serve to cover travel, accommodation and catering expenses according to the ERS travel policy available on pages 10-11. Project chairs and members are required to comply with the rules outlined in the ERS travel policy. Industry-sponsored dinners are not acceptable. No entertainment should be covered by ERS funds. Reimbursement of personal expenses via the ERS online reimbursement form must be accompanied by the relevant receipts. Only requests complying with the ERS travel policy on expenses in use at the time of the meeting will be accepted and reimbursed.

8.2 Funding for methodological support:
The level of methodological support offered depends on the type of document developed:

- *Clinical Practice Guidelines*: unless the panel is experienced enough in guidelines development following the GRADE approach, the ERS recommends that the chairs requests funding for methodological support as follows:
  - Medical librarian: up to 3'000€. Chairs are encouraged to suggest a librarian from their own institute to conduct the literature searches and provide a relevant offer. If needed, the ERS may also suggest a medical librarian.
  - Methodological support for conducting the systematic review (including statistical analyses and grading of the evidence) related to 1 or 2 PICO questions could also be requested. The maximum amount provided by the ERS to this aim is 10'000€.

- *Statements and technical standards*: hiring a medical librarian to conduct the systematic searches is strongly encouraged. The maximum amount that the ERS can allocate for external support from a librarian is 3'000€. Chairs are encouraged to suggest a librarian

from their own institute and provide a relevant offer for the searches. If needed, the ERS may also suggest a medical librarian.

8.3 Administrative support:
If needed, funding can be required for administrative support. Justifications have to be provided.

8.4 Other:
The applicants have the opportunity to ask for funding intending to cover other costs such as teleconferences or technical needs. Justifications have to be provided.

9. Conflicts of interest and confidentiality

9.1 Conflict of interest management
The ERS requests that the task force chairs 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 by both chairs, should be submitted along 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,** the conflict of interest forms from ALL panellists. The chairs are responsible for ensuring throughout the development of their document that all panellists are aware of the potential conflicts of interest of the other members.

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

9.2 Confidentiality agreement
The ERS requests that all information related to the content and development of a CPG, statement or technical standard is kept strictly confidential until completion of the reviewing of the final document. Chairs and panellists are required to not to disclose any information on the project to any third party not directly involved.

All panellists 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 chairs' responsibility to provide their members with the form to be completed and ensure that all members fill it in.

The confidentiality agreement does no longer apply as soon as the chairs are notified that the document is ready to be submitted by the ERS Office to the ERS Science Council and Executive Committee for endorsement**.**

10. CPGs, statements and technical standards joint with other organisation(s)

Mention should be made by the applicants of the desirability (if any) of establishing collaboration with other organisations or societies. The expected contribution (e.g. funding, methodological support, resources) and requirements (e.g. single or dual publication) of the other organisation(s) should be specified in the application form. As a rule, the ERS aims to publish the CPGs, statements and technical standards in any of the ERS publications and dual publication in other journals is discouraged. Under exceptional circumstances, dual publication may be considered provided that:

- the request is clearly specified in the initial proposal submitted to the Science Council for approval
- all societies equally contribute to the project

- the target audience of the two journals is different enough to justify the dual publication

Any request for dual publication after approval of the project by the Science Council or during document development will not be accepted. Instead, the ERS encourages the simultaneous publication of an editorial in the other societies' journals.

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 final document will be published.

If a joint publication is agreed, the requirements of both journals must be fulfilled, with specific consideration given to (but not limited to) policies regarding the disclosures of potential conflicts of interest, and the transfer (or otherwise) of authors' copyrights. All parties' requirements regarding publication schedules should also be considered when proposing jointly published documents.

11. Final documents endorsement, publication and dissemination

11.1 Document format

ERS CPGs, statements or technical standards are expected to be submitted for publication to the European Respiratory Journal (ERJ), or, if appropriate or part of another agreement, in another journal. In principle, the European Respiratory Journal accepts a maximum of 8000 words per task force official document free of charge. Additional material can be published as online supplement.

More detailed information regarding the preparation of manuscripts for publication in the European Respiratory Journal can be found at http://erj.ersjournals.com/authors/instructions.

11.2 Endorsement

The endorsement process may vary if the project is involving other societies or not:

1) For ERS CPGs, statements and technical standards to be published in the ERJ:

   The final document must be pre-approved by the ERS Guidelines Director and one of the ERS methodologists before being submitted to ERJ. Once the document has been pre-approved, the peer-reviewing process is initiated through the online submission platform of the ERJ, ScholarOne Manuscripts (mc.manuscriptcentral.com/erj). It is the chairs' responsibility to upload the document to the submission platform and to identify it as an ERS official 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. Following endorsement by the Executive Committee, the document is published by the ERJ as an official ERS document.

2) For joint CPGs, statements and technical standards to be published in an non-ERS journal

   The final document must be pre-approved by the ERS Guidelines Director and one of the ERS methodologists before being reviewed by external 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 for publication to the journal agreed by all societies at the beginning of the project. A second reviewing might be performed by the journal before publication. If appropriate, the society leading the development and publishing the final document is free to suggest to the ERS Office another review process which will be submitted to the ERS Guidelines Director for approval.

Task Force documents are not automatically accepted for publication and eventual publication is purely an editorial decision following external peer-review. The Editor may also decide to transmit the task force final document to another ERS journal than ERJ (ERR for instance), if considered more appropriate.

11.3 Dissemination at an ERS Congress

The ERS would like to give the opportunity to chairs to present the outcome of their task force during the ERS Congress. For CPG, one full session can be organised. Statements and technical standards are presented in one talk scheduled in a session identified by the ERS International Congress Programme Committee (ICPC).

In order to be presented at the upcoming congress, final documents should be submitted for pre-approval by March of the same year.

11.4 Other dissemination and implementation tools (for CPGs only)

In order to support the document's dissemination and implementation, the ERS requires upon completion of the manuscript, the production of derivative products such as:

a. Slide kit
b. Summary (either a general summary or a summary for clinicians)
c. Pocket Guidelines based as much as possible on decision algorithms

The chairs are encouraged to consider other dissemination tools and activities as well (e.g. presentation at international or national event) throughout the production of their document and to contact the ERS office about the different options to develop them. These additional tools are expected to be finalised upon publication of the document. They can be used by the ERS on the ERS website and by-products with unrestricted rights.

For CPGs, statements and technical standards, the final document needs to contain a list of evidence gaps that need to be addressed by future research, with precise suggestions regarding the type(s) of studies that are needed.

12. Public and patient involvement

The Science Council recognises that patient 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 welcomes 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), the development of a patient version of the outcome document as well as participation of patient representatives in guideline panels.

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 after the meeting according to the following rule:
    - Meetings taking place after the Congress
        - Expense claims can be submitted up until the Spring Meeting (including on-site during the Spring Meeting).
    - Meetings taking place after the Spring meeting
        - 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.