

# 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 funds task forces in various fields of respiratory medicine. It is intended that such task forces produce statements, technical standards or clinical practice guidelines that then are adopted as official ERS documents on issues related to respiratory medicine.

Proposals for task forces can be submitted 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 documents 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](mailto: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](mailto: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: <https://taskforces.ersnet.org/about-task-forces/item/how-to-apply-for-ers-funding>. 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 nevertheless require modifications in the project (for instance to the budget requested, the panel of experts, scope or methodology).

### **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 submit 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 accept 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)

### **3.5 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 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 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.

## **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**

Budget 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.

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 (including publications objectives) 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.
- 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 for task forces aiming at developing clinical practice guidelines**

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 nevertheless 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 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.

The ERS also has in-house methodologists 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(s), during which the methodological requirements for your project will be discussed. One of the ERS methodologists will be assigned as the lead methodologist for your TF and he/she 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 terminated 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(s) and staff.

## 6.3 Progress updates

The ERS requires that progress updates on your Task Force 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           | An 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 task force, 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 task force.

## 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 international congresses could be considered. Meeting facilities are available 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:

- 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](mailto:scientific@ersnet.org)).
- 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.
- 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.) who will travel to the Congress only to attend the task force meeting (and will not be attending any scientific or educational sessions). 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, an allowance of up to 50 euro maximum per per day and per person can be claimed upon submission of the relevant invoices. 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 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. As a rule, the ERS aims to publish the task force documents in any of the ERS publications and dual publication in other journals is discouraged. Under exceptional circumstances dual publication of task force documents may be considered providing that:

- a) the request is clearly specified in the initial proposal submitted to the Science Council for approval
- b) all societies equally contribute to the project
- c) the target audience of the two journals is different enough to justify the dual publication

Any request for dual publication after approval of the task force by the Science Council or during document development will not be accepted. Instead, the ERS encourages the publication of a simultaneous 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 reports of the Task Force 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.

## **6.8 Early Career ERS member**

The ERS is fostering education of its Early Career members. For task forces aiming to producing a guideline, the ERS Guidelines Working Group recommends the involvement an Early Career 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 Early Career member 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 Early Career TF member may also 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 of the task force can suggest an Early Career member 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 an Early Career member, with the help of the ERS Early Career Member Committee, and in agreement with the chairs.

## **7. Final documents and publications**

### **7.1 Document format**

The task force is expected to publish guidelines, statements or technical standards 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. For longer documents, 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 [erj.ersjournals.com/site/misc/ifora.xhtml](http://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 Guidelines Director and the one of the ERS methodologists before being submitted to ERJ. 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](http://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.

**Task Force documents are not automatically accepted for publication and eventual publication is purely an editorial decision**

**b) For joint Task Forces to be published in another journal (not ERS)**

The final document must be pre-approved by the Guidelines Director and one of the ERS methodologists 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 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 of the Task Force 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.

**7.3 Dissemination and implementation tools (*for Clinical Practice Guidelines only*)**

In order to support the dissemination and implementation of the task force document, the ERS recommends, upon completion of the manuscript, the development of derivative products such as:

- a. Slide kit
- b. Summary (either a general summary or a summary for clinician)
- c. Pocket Guidelines

Task force chairs are encouraged to consider dissemination tools and activities (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.

**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 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
      - 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.***