

Guidelines for the Planning and Management of American Academy of Orthotists and Prosthetists State-of-the-Science Conferences

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Introduction

A State-of-the-Science Conference (SSC) is an influential activity in evidence-based health technology assessment and transfer conducted by the American Academy of Orthotists and Prosthetists. Under this program, the Academy organizes major conferences to produce statements on the current State-of-the-Science and identification of potential research priorities on important topics related to the provision of orthotic and prosthetic (O&P) care.

A SSC is designed to provide a systematic review of literature and a ranking of evidence on a conference topic. The purpose is to evaluate the available scientific information on an aspect of O&P care and develop statements that advance understanding of the issues in question that will be useful to health professionals and the public. It may also serve as a mechanism to document clinical belief systems in O&P care based on what is understood through sound research, or from expert opinion. The goals of a SSC are to publish a document that identifies and ranks the available evidence and defines the current status of patient care, to develop consensus on controversial issues where possible, and to identify research priorities.

A SSC is run by Conference Leaders with appropriate expertise that convenes a conclave of content experts who review and assess the current peer-reviewed literature on a given subject. The Conference Chair leads the group of invited experts who assess and discuss the information, consider public input, and then compose a statement that addresses a set

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of previously posed questions. The resulting conference publication is an independent report of the Conference Participants and is not a policy statement of the Academy.

The conferences examine either emerging or established technologies or both. Conference statements and recommendations focus on safety and efficacy, although they may refer to related issues (e.g. sociologic, legal and ethical) that help to provide a context for the issue. SSCs are particularly useful for providing guidance when a controversy exists over preventive, therapeutic, or diagnostic options, or when the issue is of public as well as professional interest. The timing of the conference should neither be so early in the development of a new treatment that the data are insufficient nor so late that the conference merely reiterates a consensus already reached by the profession.

A statement is based on publicly available data and information. It is not intended as a legal document or primary source of detailed technical information, but, as deemed appropriate by the questions being posed, some components may serve as a practice guideline. The statement reflects the views of a panel of thoughtful people who understand the issue before them and who carefully examine and discuss the scientific data available on the issue. The creative work of the Conference Participants is to synthesize this information, along with sometimes conflicting interpretations of the data, into clear and accurate answers to the designated questions. The statement may reflect uncertainties, options, or minority viewpoints. Following the conference, the statement receives wide circulation.

The basic principles governing the conduct of a SSC are defined as follows:

- A topic is proposed in which invited experts present data to a broad based Planning Committee followed by inquiry and discussion. The Planning Committee then meets in executive session to review and prioritize any topics being considered for the Academy's Board to approve.
- Conference Leaders are recruited and chartered with assembling a broad based group of Conference Participants to give balanced, objective and knowledgeable attention to the topic. These Conference Participants are carefully screened and required to disclose all scientific and commercial conflicts of interest. The Conference Participants include the Chair, the Co-chair(s), expert speakers and the expert attendees who are invited to attend.
 1. Invited experts present data to the Conference Participants in public sessions followed by inquiry and discussion.
 2. A systematic literature review and evidence report is prepared for use by the Conference Participants in addressing the questions.

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3. A number of specific advance questions determine the scope and direction of a conference that will be developed by the Conference Leaders. These questions are widely circulated and are known to all Conference Participants. The principal job of the Conference Participants is to develop responses to the questions.
4. A statement is drafted by the Conference Participants with provisions for expert speaker input and public input.
5. Any revisions deemed appropriate by the chair will be adopted formally into the statement and it will stand as the record for the conference.
6. The statement is widely disseminated to achieve material impact on health care practice and clinical research.

The Topic

Topics for State-of-the-Science Conference may be recommended by clinicians, educators, researchers or other organizations associated with or engaged in the profession of orthotics and/or prosthetics. Some typical sources for suggestions may also include but are not limited to health agencies, and the public. Final selection of a topic is made when agreement is reached by the Academy's Planning Committee and the AAOP Board. A SSC topic must meet the following criteria:

1. The topic should have public health (habilitation or rehabilitation related) importance; it should affect or broadly apply to a significant number of people who possess physical dysfunction that is amenable to prosthetic or orthotic management. The severity of the problem (morbidity and mortality) and the feasibility of intervention are key considerations
2. Controversy or unresolved issues can be clarified, or a gap between current knowledge and current practice may be narrowed.
3. The topic must have an available base of scientific information from which to answer the conference questions and/or resolve controversies. If conference questions and/or controversies cannot be fully addressed or in some cases in which there is primarily "anecdotal" information, then targeted research priorities are formulated.
4. The topic should be amenable to clarification based upon evidence, and the outcome should not depend primarily on subjective judgments of the Conference Participants.

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Additional elements desirable in selecting a conference topic are the impact on health care costs and a high degree of interest. After a topic is judged to meet the selection criteria, planning and implementation of the SSC may proceed. The primary goal of a State-of-the-Science Conference is to summarize the evidence regarding conference questions and to recommend directions for further research. Where appropriate, the SSC may also identify generally accepted clinical practices based on current expert opinion.

The Academy Staff

Academy staff is responsible for conference logistics, publicity, evaluation, continuing education accreditation, and any other administrative tasks.

The Academy assigns a staff member to assist the conference chairperson and the Co-chair(s). This staff person works with the volunteer leadership and other conference participants in organizing the conference and also assists the Planning Committee.

The Planning Committee

The Planning Committee is composed of individuals selected by the Academy board to initiate and oversee the SSC process.

1. The Planning Committee will: (a) review proposed conference topics and the related major questions to be addressed; (b) review the general scientific base supporting the topic; (c) determine if the topic and questions meet the criteria for a SSC; (d) prioritize topics and provide recommendations to the Academy's Board of Directors.
2. After acceptance of the topic(s) by the Academy Board, the Planning Committee will outline general conference objectives and establish a timetable for conference planning. The Planning Committee will identify other interested parties and consider appropriate roles for them, which may include co-sponsorship of the conference. Representatives of other organizations may be asked to join the planning process.
3. The Planning Committee will meet to review the scope, title, and approximate date of the proposed conference, and to recruit the Chair. The Committee, with Academy staff assistance and Board oversight, will develop a travel and conference budget.

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4. The Planning Committee may delegate a review of the literature to a specific party; when complete, the review may be posted online for access by the Conference leaders and Conference participants.
5. The Planning Committee will oversee the progress of all SSCs through completion. It will maintain regular contact with the chair related to the successful completion of each conference. This Committee serves as a liaison to the Academy Board of Directors for this activity.

The Conference Leaders

The Conference Leaders are a Chair and Co-chair(s). The Chair should be knowledgeable in the area under consideration and a strong public moderator, as well as a skillful leader of group discussion. The Chair will recruit one or two person(s) to serve as Co-chair(s) and is responsible for leading the deliberations. The Chair may not be a speaker. The responsibilities of the Conference Leaders may include:

1. Refine the conference questions.

A SSC is structured around key questions posed to the panel. Ordinarily, four to six questions are posed, including questions on the efficacy, risks, and clinical applications, plus a final one on directions for future research. These questions determine the scope and substance of the conference. They should be framed so that answers can be derived from scientific information presented by the speakers and derived from the literature. The phrasing of the questions should not allow for responses based solely on subjective judgments or opinions of the panel. Questions should be straightforward and concise.

2. Initiate, review and approve the literature search and evidence report.
3. Select the Conference Participants:

A range of expertise among the Participants is important for the ability to deliberate on the varied scientific material presented. This diversity enhances the credibility of the statement. The Conference Participants should represent various sectors of professional and community life, and ideally will include each of the following four general categories:

- a. Research investigators who are active in the field or area under consideration.

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- b. Health professionals who use the technology, including orthotists, prosthetists, physicians, therapists, psychologists, nurses, or other health care providers.
- c. Methodologists, such as epidemiologists, biostatisticians, and clinical trialists.
- d. Public representatives, such as ethicists, lawyers, economists, public interest group or voluntary health association representatives, consumers, and patients.

Conference Participants must be thoughtful, able to weigh evidence, and capable of collaborative work. Participants may also be asked to author a manuscript and serve as a speaker at the conference.

The number of Conference Participants may vary from four to sixteen members, with twelve to thirteen members found to be an effective number for a working group.

All speakers are expected to provide manuscripts of their presentations to the Academy coordinator at least one month before the conference.

4. Draft the conference program

The conference program should be broad enough to encompass the body of scientific information essential to answering the conference questions and should include divergent scientific and clinical views. Presentation topics should be selected so that speakers can use the style and format appropriate to scientific meetings; that is, the presentations should be based on analysis of data, with methodology fully explained and citations to the relevant scientific literature provided. The intent is that conference speakers will present information as scientific experts, not as advocates of particular answers to specific questions.

An appropriate balance between formal presentations and discussion should be provided in the time allotted.

The SSC is usually held over a two to three day period. Each day's agenda will be established by the Conference Leaders recruited for a specific topic. On the evening of the first and second day, the Conference Leaders and selected Participants may meet in executive session to begin to draft a response to the conference questions based on the information presented.

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On the third day, the Conference Leaders may again meet in executive session and complete a draft of the statement.

5. Consult with Academy Staff on planning the meeting logistics.
6. Request, coordinate and disseminate the manuscripts of scheduled participants to the other participants.
7. Encourage interested parties to attend the conference and present testimony.
8. Identify the target audience to disseminate information as widely as possible.
9. Lead the plenary session of the conference, keeping to recommended time schedule, maintaining the groups focus and handling issues as they arise.
10. Produce a written document for publication as conference proceedings and present findings as requested at various venues.
11. Review the content of subsequent work based the conference proceedings, upon request.
12. Identify organizations and publications to which the proceedings should be sent.

The Conference Participants

At the outset of the conference, the conference Chair briefs the Conference Participants on the SSC process and procedures. Conference Participants may then discuss the areas in which they wish to probe individual speakers and outline their approaches to answering the conference questions.

The conference plenary sessions are moderated by the Chairperson who ensures that speakers adhere to time limits, allows ample opportunity for scheduled discussion, and invites questions and comments from Conference Participants and audience members.

The Conference Participants should attempt to reach consensus on each question based on the scientific evidence presented. To produce a firm statement, the Conference

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Participants are encouraged to draw clear conclusions whenever feasible. If agreement cannot be achieved, minority or alternative views should be included. A straightforward expression of diversity is preferable to a contrived or ambiguous consensus.

Following the conference, revisions of the statement are promptly incorporated into a final draft and sent to the all Conference Participants for a final review. The statement is then sent to the Chair and Co-chair(s) for final approval. Following this process, the statement is considered final.

Public Input

The American Academy of Orthotists and Prosthetists believes that having public input to Academy sponsored State-of-the-Science Conferences is very important, and opportunity for public input is included as a vital part of this process.

The Academy will communicate the announcement of future State-of-the-Science Conferences after the Conference Chair and Co-chair(s) are selected. This will ideally occur three to six months before the conference date. This public announcement may be done via the Academy website.

The public will have the opportunity to provide material to the Conference Participants in either written or oral form, and the public will be allowed to listen to expert speaker presentations and speaker discussions

- 1. Written Material:** twenty copies of written statements, as well as one electronic copy (MS Word, MS PowerPoint or PDF), must be submitted at least four weeks before the date of the conference. This allows for distribution to the panel for review prior to the meeting. The Academy staff will also bring copies of the submitted material to the meeting.
- 2. Oral Presentations:** Oral presentations and comment from the public will be allowed. Up to sixty minutes on the first day and up to sixty minutes on the second day of the conference will be scheduled for public presentations. Prior requests for public presentation are strongly recommended to allow for adequate scheduling of time. The Chair has the ultimate authority for determining the duration of individual presentations.

Public comment will be welcomed from: consumers, patients, public interest groups, voluntary health association representatives, physicians, nurses, therapists,

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manufacturers, ethicists, economists, and insurance industry representatives. Prosthetic and orthotic clinicians not included as Conference Participants are also welcome to provide public input. Funding for attendance by the public is unfortunately not available.

The Conference Leaders and expert invited attendees and speakers need to have separate time for deliberations, and drafting of the conference documents. Attendance at the conference deliberations and the drafting of conference documents will be limited to the Conference Participants.

Conference Evaluation

The Planning Committee will solicit an evaluation of the process utilized during the execution of the conference from the Conference Leaders, Participants, and public attendees. This input is sought for evaluating and improving future conferences.

Continuing Education Credit

The Academy may apply for continuing education credits for the SSC.

Conference Results

All results from the State-of-the-Science Conference are considered the intellectual property of the American Academy of Orthotists and Prosthetists. For one year following the conclusion of the SSC, dissemination of the conference Report (including any public presentations of the results from the conference) requires written approval from the Academy. Conference results may receive attention from the media. The major print and other media may report the results of a SSC, which serves to focus attention on the topic and the conference statement. The Conference Committee's final statement is posted to the Web.

The proceedings and research priorities are printed by the Academy and may be distributed to health agencies, private sector health care organizations, directors of continuing medical education at hospitals, deans of medical/allied health science schools, directors of State and medical societies, and directors of Health Maintenance

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Organizations and Preferred Provider Organization. The research priority/consensus statement may also be sent to targeted individuals and organizations.

The proceedings may be sent to an appropriate journal for possible publication. In addition, the Academy may place notices in a number of other professional journals announcing the availability of the statement. The research priority/consensus statement, along with selected papers from a SSC, may also be published as a supplement to a medical journal or as a monograph.

Logistical Support

The Academy's staff liaison will provide travel and management assistance throughout the planning and conducting of a SSC. Allowable expenses for travel, lodging and meals related to attending the SSC will be reimbursed by the Academy for Conference Leaders, Conference Participants, and Planning Committee members

Consensus Development Conference

If a suggested topic has adequately defined scientific information in the form of Randomized Controlled Trials [Double Blind], Randomized Controlled Trials, and/or Cohort Studies then it may be designated as a Consensus Development Conference (CDC). Conferences so designated will be conducted in the same manner as a State-of-the-Science Conference but their findings will be of special significance due to the availability of credible objective scientific evidence in support of the conclusions drawn.

References

Adapted from:

Guidelines for the Planning and Management of NIH Consensus Development Conferences Online. Bethesda (MD): National Institutes of Health, Office of the Director, Office of Medical Applications of Research; 1993 May. 13 p. Updated October 2001.