

## Research Ethics Collaborative: Consultant Information for the Primary Consultant

The potential benefits of inviting the Collaborative members to an in-progress consultation include gaining additional expertise and multiple perspectives on complex ethical questions.

### ***Before the Call:***

1. Obtain permission from the consult requestor, and provide the requestor with two PDFs:
  - a. [Research Ethics Collaborative Member Biosketches](#)
  - b. [Research Ethics Collaborative: Requestor Information](#)
2. Explain that the consultants have agreed that they will not share any details without the requestor's permission. We recommend that you exclude any highly sensitive information from the group discussion.
3. Contact the Collaborative via the listserv ([CRECollaborative@uw.edu](mailto:CRECollaborative@uw.edu)) to gauge interest and availability prior to scheduling. Provide the group with the following information:
  - Date, time, and duration of consultation.
  - Call-in details.
  - A brief description of the reason for the consultation.
4. Have this handout available for reference during the call.

### ***During the Call:***

1. After your introductory remarks, do a roll call of the consultants you expect to be on the call. At the end, ask if anyone else is on the call and ask them to introduce themselves.
2. Ask the consult requestor to present the case.
3. After the case is presented, ask any clarifying questions. Then ask the collaborative consultants if they have any clarifying questions.
4. Discuss issues with the requestor. Then ask the collaborative consultants if they have additional comments.
5. Develop recommendations with requestor and summarize. Then ask the collaborative consultants if they have any final comments.

### ***After the Call:***

1. Send consult report draft for review by those who participated. Include a reply-by date.
2. Consider any comments from the other consultants to be advisory. You remain responsible for the content of the consult. In essence, the collaborative group is advising, but you are responsible for the content that is communicated back to the consult requestor.
3. Send requestor the final report.
4. Email final report to the collaborative consultants who participated in the call.
5. Send out an evaluation to the requestor and to the collaborative consultants who participated in the call.

## Research Ethics Collaborative: Consultant Information for Collaborative Consultants

When a Collaborative member invites other members for a specific in-progress consultation, follow these steps:

### ***Before the Call:***

1. Promptly respond to the primary consultant's invitation to participate, indicating whether or not you will be present for the call.
2. Commit to being present at the start of the consultation to avoid repetition.

### ***During the Call:***

1. Hold your questions and comments until invited by the primary consultant to share, allowing the primary consultant the opportunity to obtain the relevant information in a more straightforward and conversational manner.
2. Once invited to actively participate, introduce yourself by name before asking clarifying questions or contributing your thoughts and opinions.

### ***After the Call:***

1. Send any questions or comments that remain after the consultation to the primary consultant via email.
2. Do not share any details of the consultation unless permitted to do so by the consult requestor. Issues of confidentiality and reporting disclosures are the responsibility of the primary consultant.
3. If invited to review a draft consultation report, respond in a timely fashion. The primary consultant will provide a reply-by date when the report is circulated.

### ***Confidentiality, Reporting, and Liability***

- Collaborative consultants are expected to keep the details of the discussion confidential.
- Each consult service has its own guidelines for limits of confidentiality and reporting obligations. Those outside of the initiating institution are expected to not make disclosures to the requestor's institution or to their own.
- Many consult services have clarified with their institution that consultation is part of their official duties and covered under their standard liability protections. If you have any concerns about uncovered liability by offering advice to another consultant group, you should follow up with your institution's officials.