



## Community Advisory Board (CAB) Member - Guidelines

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## 1. Overview

### Purpose

These guidelines apply to all Community Advisory Board Members organized on behalf of or otherwise affiliated with Drexel University. These guidelines establish best practices for selection, recruitment, and establishment of payment mechanisms and agreement types.

## 2. Definitions

**Community Advisory Board (CAB)** is a collective group of community members and representatives that provide community insight, information, and assistance to a research project or initiative team at Drexel University or one of its affiliated entities, including the Academy of Natural Sciences of Drexel University.

**Human Subject/Participant** is a living individual about whom an investigator conducting research; 1) obtains information or biospecimens through intervention or interaction with the individual, or 2) obtains, uses, studies, or analyzes identifiable private information or identifiable biospecimens.

**Research Personnel** are individuals engaged in human subjects research, specifically, individuals who intervene or interact with human subjects or access identifiable information for research purposes. They must obtain IRB approval for their participation. Engaged for the purposes of this definition refers to [OHRP's Guidance on Engagement](#) and primarily when its employees or agents, for the purposes of a research project, obtain:

- Data about the subjects of the research through intervention or interaction with them;
- Identifiable private information about the subjects of the research; or
- The informed consent of human subjects.

Therefore, individuals who intervene or interact with human subjects or access subjects' identifiable data for research purposes are considered engaged in research and must obtain IRB approval before conducting HSR activities.

Not all individuals involved in research are engaged in the human subjects portion. Individuals not engaged in HSR do not need to obtain IRB approval for activities related to the research.

**Human Research Protection Program (HRPP)** is responsible for providing administrative and regulatory support to the Drexel University IRB. HRPP provides guidance on the responsible conduct of human research to Drexel's IRB members, faculty, investigators, and the research community.

**Institutional Review Board (IRB)** is an appropriately constituted independent group formally designated to review and monitor research involving human subjects. In accordance with regulations, an IRB has the authority to approve, require modifications in (to secure approval), or disapprove research. This group review serves an important role in the protection of the rights and welfare of human research subjects.



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**Principal Investigator (PI)** is the individual responsible for the preparation, conduct, and administration of a protocol, research project, research grant, cooperative agreement, training or public service project, contract, or other sponsored project.

### 3. Role and Impact of Community Advisory Board Member

Drexel University has a longstanding and ongoing commitment to making a difference in community life through collective, public problem-solving to reach a shared vision. A Community Advisory Board (CAB) contributes to Drexel University's commitment by:

- Bringing forward the lived experiences, needs, and priorities of the community voices that may otherwise not be heard or represented at the table.
- Sharing wisdom, cultural knowledge, and experiences.
- Being a critical “two-way” bridge to promote equity, inclusion, and partnerships.

In addition to the CAB-specific goals and activities, CAB Members will also be able to make an impact by:

- Influence programs and policies affecting a community.
- Engage with researchers and scholars to disseminate translatable and meaningful knowledge to the impacted communities.
- Raise awareness of Drexel University's research, students, and available resources to the community.

#### 3.1 Selection of Community Advisory Board Members

CAB members are typically selected through a process that aims to ensure diversity, representation, and expertise supporting the advisory board's purpose and goals. When selecting advisory board members, consider the following:

1. **Define Inclusion Criteria:** Clearly defining the inclusion criteria for your advisory board. These criteria should specify the types of diversity or representation you want to achieve. Common inclusion criteria may include race, ethnicity, gender, age, expertise, geographic location, or specific lived experiences related to the research topic.
2. **Identify Stakeholders:** Identify the key stakeholders or groups that should be represented on the advisory board. These stakeholders may include individuals from the target population, experts in the field, advocates, community leaders, or members of organizations with relevant expertise or resources.
3. **Community Input:** Seek input from the community or the population the board aims to serve. This can be done through surveys, focus groups, or community meetings to understand their preferences and priorities regarding advisory board composition.
4. **Recruitment Strategies:** Use various recruitment strategies to identify potential advisory board members who meet the inclusion criteria. These strategies may include:
  - a. **Open Applications:** Invite interested individuals to apply for advisory board positions through a communicated process. Ensure that the application



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- process is accessible to all.
- b. **Networking and Partnerships:** Collaborate with community organizations, advocacy groups, or academic institutions to identify potential members representing different population segments.
  - c. **Nominations:** Allow stakeholders and community members to nominate individuals who they believe would be suitable for the advisory board.
  - d. **Diversity Assessment:** When reviewing potential members, assess their qualifications and alignment with the research project's goals and objectives.
5. **Interviews or Assessments:** Conduct interviews or assessments to better understand candidates' skills, perspectives, and commitment to the research project or the advisory board's goals. This can help ensure that selected members fit the advisory board well.
  6. **Balancing Representation:** Strive to strike a balance between different dimensions of diversity, such as race, gender, age, and expertise, to ensure a comprehensive range of perspectives on the advisory board.
  7. **Transparency:** Maintain transparency throughout the selection process. Make it clear to potential advisory board members how they were selected and what is expected of them regarding participation and contribution.
  8. **Feedback and Evaluation:** Continually seek feedback from advisory board members and the broader research community to assess the board's effectiveness and make improvements.
  9. **Inclusive Practices:** Be open to adjusting the inclusion criteria and recruitment strategies as needed to address any gaps or issues that may arise during the CAB.

Selecting advisory board members to meet inclusion criteria involves a thoughtful and systematic approach that considers the research or board's goals, the community's needs, and the principles of diversity and representation. Being inclusive, transparent, and flexible throughout the selection process is essential.

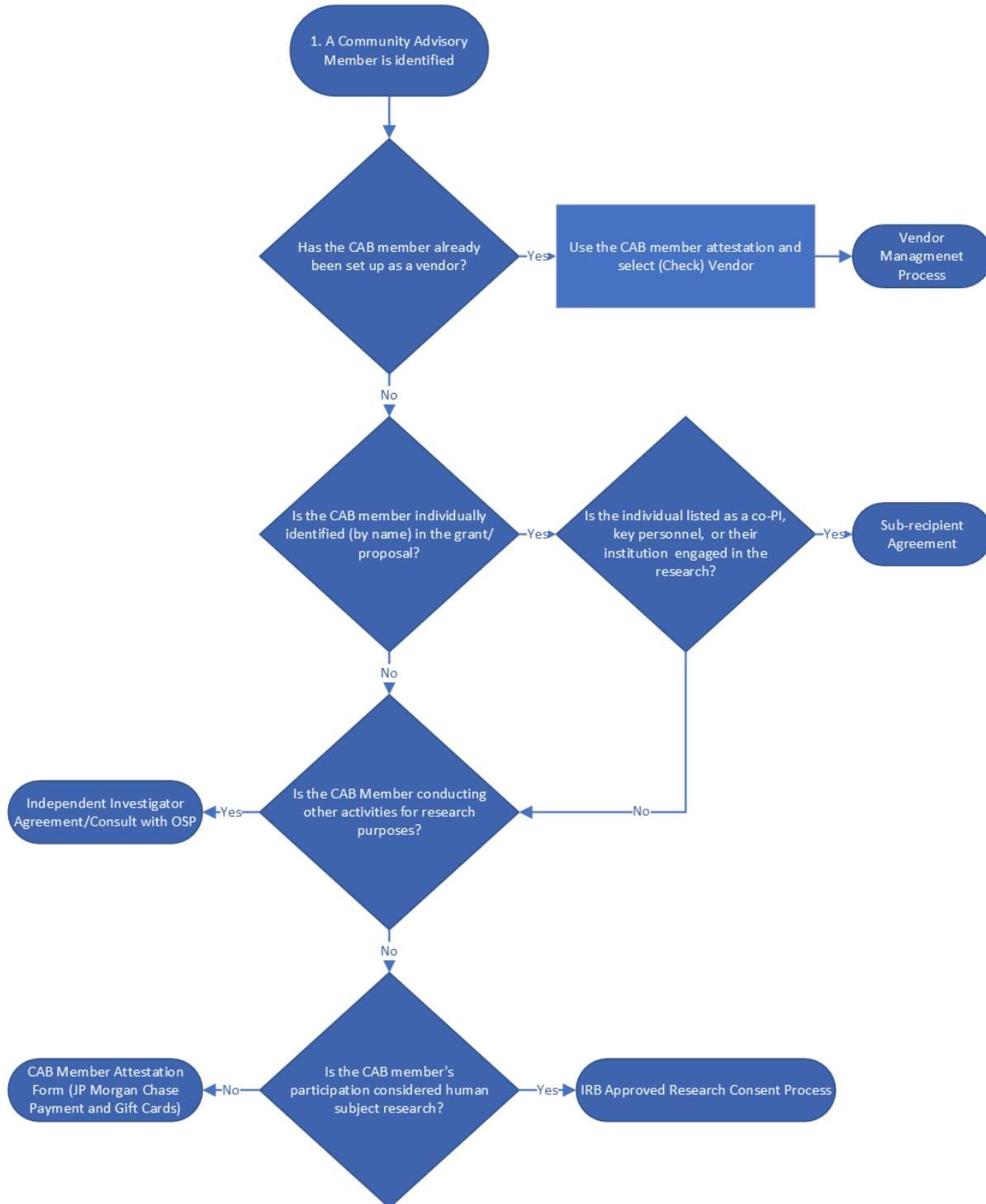
## 4. Payment Mechanism and Agreement Type Selection

Payment mechanisms and agreement types for CAB members can vary depending on several factors, including the funding sources, the activities of the advisory board members, and engagement by collaborating institutions. Please refer to the algorithm to ensure the appropriate payment mechanism and agreement aligns with requirements from federal funders, regulations, and Drexel University's policies, procedures, and guidance:



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### 4.1 JP Morgan Chase Payment Mechanism

CAB Members who meet the “Payment Mechanism and Agreement Type” criteria for JP Morgan Chase Payments can request account set-up through ORI-Finance by submitting the [Request to Use JP Morgan Chase Payment Form](#).

### 4.2 Community Board Member Attestation Form

The “CAB Member Attestation Form” ensures that CAB members are fully informed about their roles, responsibilities, and the purpose of their participation in the board. It sets clear expectations and prevents misunderstandings.

Similar to obtaining consent for participation in human subjects research, an effective CAB member attestation process includes the following best practices:

- Customize the “CAB Member Attestation Form” in designated areas. Clearly outline the purpose of the CAB, the roles and responsibilities of CAB members, any payment or remuneration they can expect to receive, and tax documentation as applicable.
- Specify the duration of CAB membership and the frequency of meetings or interactions.
- Include an option for CAB members to withdraw their attestation or discontinue participation at any time.
- Ensure the attestation form is written in plain language that CAB members can understand.
- Provide a point of contact for questions or concerns related to the CAB.
- Periodically review and update the attestation form to reflect changes in the CAB's activities or remuneration.

The “CAB Member Attestation Form” template may only be revised in the designated areas. If changes are required outside the designated areas, this requires additional review and permission from ORI-Research Compliance and Regulatory Affairs to ensure alignment with institutional stakeholders (e.g., Tax and Procurement Offices, Office of General Counsel).

By establishing a clear and respectful CAB member attestation form and process, you can create a positive and productive relationship with your advisory board members while complying with Drexel University’s policies, procedures, and ethical standards.

### 4.3 Human Subjects Research (HSR) and Community Advisory Board Members

Community Advisory Board Members and Human Subject Research are two distinct activities; however, they can be related in certain situations, and there may be appropriate overlap. Often, CAB Members’ activities are not considered HSR requiring IRB approval as the intent of the CAB is not to create generalizable knowledge but instead to help provide feedback or input for future projects or research. In these situations, the CAB attestation form should be utilized. It



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does not require IRB approval or review, as it does not meet the definition of Human Subjects Research requiring IRB oversight.

If the intent of the CAB is also to create generalizable knowledge, then the project also requires the oversight of IRB, including approval of all participant-facing material. When determining whether a CAB Member Attestation Form, IRB Consent Form, or both should be used in a project, consultation with Drexel University's HRPP is recommended. ORI and Drexel University's HRPP always recommend submitting a Human Subject Research determination to determine whether a project requires IRB oversight.

## 5. Responsibilities

### 5.1 Office for Research & Innovation Responsibilities

The Office for Research & Innovation is responsible for maintaining these procedures, applicable tools, training, and monitoring. Specifically, different areas of ORI (e.g., HRPP/IRB, Export Control, OSP) have additional responsibilities as designated compliance offices, which are outlined per their guidance, policies, and procedures. For inquiries regarding these procedures, please contact the Associate Vice Provost for Research Compliance and Regulatory Affairs, as part of the Office for Research & Innovation (ORI).

### 5.2 Principal Investigator Responsibilities

The Principal Investigator is ultimately responsible for the conduct and oversight of the community advisory board and its members, including the following:

1. Retention of CAB Member documents, including attestation and W-9 tax forms as applicable by Drexel University's Records Management Policy (OGC-4) and Records Retention Schedule.
2. Compliance with all regulations and applicable University policies and procedures related to CAB Members.
3. Compliance with all project-specific guidelines and procedures (e.g., export control, COI, IACUC, IRB, OSP).
4. Ensure all Drexel personnel engaged in the community advisory board have an appropriate Drexel University employment status, expertise, experience, training, and credentials to conduct activities under the Principal Investigator's oversight.

As different institutions have different requirements, rules, and expectations, please ensure you know Drexel University's policies, procedures, and guidelines prior to proceeding with research, projects, or programs.

## 6. Resources

- CAB Member Attestation Form Template
- CAB Payment Mechanism and Agreement Algorithm
- [Request to Use JP Morgan Chase Payment Form](#)



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### **7. Revision**

Version 001/Effective Date 09/01/2023: Original Document – Community Advisory Board Member Guidelines

Version 001/Effective Date 11/01/2023: Revised Document

- Updated Quick Pay to JP Morgan Chase payment method

Version 002/Effective 12/17/2025: Revised Document

- Added the link to the JP Morgan Chase Payment Form