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Standard 1

 Inclusive opportunities

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| **The standard** | **Our aspirations on this standard** |
| We offer public involvement opportunities that are accessible and that reach people and groups according to research needs. We want research to be informed by a diversity of public experience and insight so that it leads to treatments and services which reflect our needs. | Researchers and the public will report working with a broader range of people who have the condition being studied. |

| **Indicator** | **What we are already doing well** | **What we aim to do / more of** | **How will we judge if we are improving?** |
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| 1.1 We involve people affected by and interested in the research at the earliest stage | * Much of our research involves the public before funding is granted, including inclusive techniques such as use of online input.
 | 1. We will increase the proportion of our PPI work that involves going out to meet with patient support groups, community groups and voluntary sector groups in their own setting.
2. We will increase the amount of public engagement activities we engage in to increase the diversity of our PPI Contributors, including stalls in shopping centres.
3. We will do creative outreach to recruit more young contributors including through sports teams, to schools/colleges, in social media, on bus screens, at festivals etc.
4. Teams will recruit contributors with demographic characteristics that most relate to their research project; this will include age, socio-economic group, non-English as first language, disability etc.
 | 1. We will be able to report more ongoing relationships with community groups and recruitment of PPI Contributors will increase from these groups.
2. Each theme or research group will be able to report on at least one public engagement event per year.
 |
| 1.2 We identify and address barriers to taking up public involvement in research | * When our PPI Contributors are travelling by train staff book & pay this for them and every effort is made to ensure that payment and expenses claims are paid as quickly as possible.
* In making funding applications researchers routinely calculate all PPI input so that it is appropriately resourced. Guidance from the PPI coordinator is available for this.
 | 1. We will work with the University of Oxford to enable our involved public to use simpler forms than the current expenses form (NHS England model), including not requiring a wet signature
2. We will encourage researchers to include the people who face barriers to involvement via suitable methods, e.g. phone contact.
3. We will develop ways of getting the views of people who don’t have the ability or wish to speak in a meeting, such as in 1:1 interviews, online etc.
4. Develop guidance on how to find and use interpreters or signers
 | 1. A simpler form of expense form will be approved by University finance system.
2. Our reporting will indicate when people who face barriers to involvement have been included in PPI.
3. Our reporting will indicate where PPI has been done online, in phone interviews or in non-meeting ways.
4. The [Guide](https://www.phc.ox.ac.uk/files/get-involved/guide-for-researchers-in-working-with-ppi-contributors-17.pdf) will include the use of non-English speaking facilitators
 |
| 1.3 We make information about opportunities for public involvement in research available, using different methods so that we reach relevant and interested people | * [Guide for researchers working with Patient and Public Involvement (PPI) Contributors](https://www.clahrc-oxford.nihr.ac.uk/files/get-involved/guide-for-researchers-in-working-with-ppi-contributors-17.pdf) makes it clear how to openly advertise and recruit opportunities.
* The PPI Coordinator edits [Involvement Matters](https://www.clahrc-oxford.nihr.ac.uk/public-involvement/public-involvement-newsletters) which is a regional resource to broaden recruitment to a wider audience.
* Teams are regularly reflecting on how inclusive they are being and challenging themselves to consider other ways to reach their demographic.
* We have done some innovative outreach work that has looked for ways other than financial reward to engage people, for example giving information to new mothers not available from NHS at Mothercare outlets (CLAHRC Theme 6)
 | 1. We will take all opportunities available to us to increase our levels of public engagement including fairs and festivals. In particular we will work more closely with CRN.
2. We will use open advertising where appropriate (such as on bus screens) and where we believe that this will genuinely increase recruitment.
3. We will ask large employers to adopt us as part of their corporate social responsibility for generic topics such as mental health or smoking.
 | 1. Each theme or research group will be able to report at least one public engagement event per year.
2. Involvement Matters will demonstrate an increase in readership which includes parish councils and more representatives of voluntary sector groups that are being collaborators.
3. We will have at least one company who make us their ‘volunteering’ opportunity of the year
 |
| 1.4 We have fair and transparent processes for involving the public in research | * All of our advertised opportunities make it clear what their selection criteria will be.
 | 1. We will ensure that all research projects on the website have a plain English summary and make it clear if the project is open to recruiting PPI Contributors.
 | 1. Lay reviewers will report positively on the plain English summaries on our websites.
 |
| 1.5 We offer choice and flexibility in opportunities for public involvement in research | * Each project routinely considers which method of contribution will be most appropriate. So for example young people may not want to be on a Trial Steering Committee but could be active in an advisory group. PPI Contributions are elicited in face to face meetings, via email, in Skype calls and teleconferences.
 | 1. We will give our new recruits a sheet similar to the headings on a participant’s Patient Information Sheet outlining what they can expect which has a tear off reply element for them to say if they have any special needs or training requests to help them be fully involved
 | 1. This sheet will be created with contributors and PPI Contributors will routinely report that they were given it as part of their random review.
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**Standard 2**

**Working together**

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| **The standard** | **Our aspirations on this standard** |
| We work together in a way that values all contributions, and that builds and sustains mutually respectful and productive relationships.We deliver better research when we work together on a common purpose. Different perspectives are respected and embraced through clearly defined roles and responsibilities. | We will increasingly embed the public in all aspects of our work at all levels. We will ensure that this is a positive experience for the involved public and staff, enhancing our outputs. |

| **Indicator** | **What we are already doing well** | **What we aim to do / more of** | **How will we judge if we are improving?** |
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| 2.1 We jointly define and record the purpose of our public involvement activity | * We have a PPI strategy online
 | 1. More of our projects will work with PPI Contributors to agree the nature of PPI at the beginning of a project
 | 1. Our routine use of our newly developed recording for impact tool will frequently demonstrate that the public are (and feel) involved in defining our research activity
 |
| 2.2 We develop public involvement plans and activities together | * It is standard practice to work with the PPI Coordinator to plan appropriate PPI for each project, building this into funding applications and later project plans.
 | 1. We will create a trial manager role checklist which includes communicating with the involved public regularly
2. It will be standard practice for the CTU and research leads to appoint a PPI liaison officer for all projects
3. We will more standardly involve the public in setting the research questions we seek to answer
 | 1. The trial manager checklist will exist and PPI Contributors will routinely report that they were given it as part of their random review
 |
| 2.3 We ensure there is shared understanding of roles, responsibilities and expectations, which may evolve over time. | * Teams work with their recruited PPI Contributors to ensure that clarity about the nature of their involvement is shared, with clear timelines, expectations of what they are expected to give and what they can expect to get out of it. This includes an understanding that they can withdraw from the project (short term or permanently) if personal reasons require this.
 | 1. We will provide information and support on good practice in chairing meetings involving the public, setting up Terms of Reference, and devising role descriptions.
 | 1. The PPI Coordinator will conduct an annual review with randomly selected PPI Contributors by email and phone which will in part be an opportunity to check if they were given a written role description or understand their role. Also whether they were given any induction materials relevant to the specific project. Learning from these reviews will be fed back to researchers.
 |
| 2.4 We recognise individual ideas and contributions and uphold decisions together. | * Research teams are open to using innovative methods for involving the public and have developed good practice around ensuring meaningful involvement of the public in a range of ways, including using public co-applicants who chair and recruit public advisory groups on projects.
 | * Teams will provide feedback to the contributors which includes explaining why they may not have acted on input.
 | * All teams will have set up systems to communicate with public contributors regularly, even when there is little to report.
* All teams will have developed ways to minute meetings such that public contributions are noted and will have developed systems to enable PPI Contributors to give feedback on their involvement and whether they were involved in decision making
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**Standard 3**

**Support & learning**

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| **The standard** | **Our aspirations on this standard** |
| We offer and promote support and learning that builds confidence and skills for public involvement in research.We seek to remove practical and social barriers that stop members of the public and research professionals from making the most of public involvement in research. | We will build on the strong foundations we have created for a wide range of good quality learning experiences which are open to the issues involved and enable an equal and honest dialogue between learners.We will ensure that our support is open to as many as possible by using diverse methods. |

| **Indicator** | **What we are already doing well** | **What we aim to do / more of** | **How will we judge if we are improving?** |
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| 3.1 We designate and monitor resources to ensure and support effective public involvement | * PPI Co-ordinator continues to be involved in training meetings of CLAHRC and NDPCHS so that PPI training is reflected on and developed in the wider context
 | * We will add attendance at PPI training to the PDR
 | * The PDR will include training on PPI
 |
| 3.2 We offer a range of support to address identified needs | * We have developed a strong programme of support and learning, often in partnership with NIHR infrastructure organisations locally based on the identified training needs of the public and staff
* We offer some support and learning to staff in protected space.
 | 1. We will offer PPI Contributors access to learning online which is available to staff if they feel this would develop their ability to contribute e.g. IT skills
2. We will develop a voluntary mentoring scheme for new PPI Contributors by experienced PPI Contributors
3. PPI liaison staff, appointed for each project, will be given a clear checklist on how to brief public contributors before meetings – this will also link to mentoring scheme
 | 1. Some University online learning will be available to the involved public
2. A mentoring scheme will exist amongst PPI Contributors
3. Projects will each be able to identify a PPI liaison member of staff
 |
| 3.3 We have a clearly identified point of contact for information and support | * PPI pages on website include Coordinator details
 | * We will promote the new NIHR learning and development website
 | * We will ensure that all our training is on the NIHR website
 |
| 3.4 We develop, deliver and monitor learning opportunities in partnership, for all involved in research | * We offer PPI Contributors access to existing online training such as Futurelearn
* We work with PPI Contributors and staff to co-produce more training opportunities open to both
 | * We will embed co-production into the planning of all of our PPI training, including that just offered to staff
* We will monitor how many of our PPI Contributors and staff are undertaking what training
 | * PPI Contributors will be aware of which colleagues are involved in planning training
* We will be able to report on training uptake and outcomes
 |
| 3.5 We actively learn from others, we build on what we have learned and share our learning | * We work with colleagues in other NIHR infrastructure organisations to share learning and good practice, including the national CLAHRC and SPCR PPI networks
 | * We will ask PPI Contributors what they wish they had been told in induction and include in future sessions
* We will ask staff what training they feel they need in PPI and include in future sessions
 | * Training will increasingly respond to expressed needs
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Standard 4

Communications

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| **The standard** | **Our aspirations on this standard** |
| We use plain language for timely, two way and targeted communications, as part of involvement plans and activities.Plain language helps develop shared understanding in research. Free flow of information and adapting communication for particular needs helps keep the focus of involvement on improving research and outcomes. | In communicating with our PPI Contributors we will be flexible and use appropriate means. We will ensure that our communications are clear, simple and timely and that they happen at all stages of the research cycle and beyond.  |

| **Indicator** | **What we are already doing well** | **What we aim to do / more of** | **How will we judge if we are improving?** |
| --- | --- | --- | --- |
| 4.1 We develop and deliver a communications plan for our involvement activities | * The CLAHRC and NDPCHS have communications staff able to offer advice and support on all communications plans.
* Advice is given to project teams on making communication plans that are achievable and realistic to the team’s capacity
 | * We will ensure organisational websites are updated in a timely manner
* We will include project updates in our PPI newsletter to give feedback to public contributors
* We will develop a template communications plan for involvement activities. We will provide template tools for creating communication plans that are responsive to people’s needs with examples.
* Teams will be informed of guides to assist in communicating with people with special needs e.g. DEEP for dementia
* We will ensure that any adverts that are sent to the pool allow adequate time for people to apply
 | * Websites will be regularly updated
* PPI newsletter will include project updates
* Templates for communicating well will exist
 |
| 4.2 We are inclusive and flexible in our communication methods to meet the needs of different people | * We have developed our webpages and aim to make them accessible.
* We provide information to people in a variety of ways, including hard copies for those do not use the internet.
* We provide materials in large font and yellow paper for those with visual impairment.
 | * All communication will be tailored to the needs of public contributors, taking language and comprehension into account. Venues for meetings and dissemination events will accessible (hearing loops, wheelchair access).
* Teams will regularly reflect on whether they are involving people who do not use the internet. Where appropriate we will assist people who need help to complete online surveys (including asking PPI Contributors to take this role) – for example at library IT training sessions
 | * Teams will inform their public contributors using appropriate levels of data i.e. not simply sending them the same information as they send colleagues and using infographics (Power Toon is free resource) and plain English versions
* Recruitment of PPI Contributors will use more diverse communication channels
 |
| 4.3 We gather, offer and act on feedback, which we then share. |  | * We will develop with some volunteers a PPI Contributor ‘experience of working with us’ survey and send to all at least annually as a simple feedback tool
* Teams will be encouraged to provide regular feedback to their public contributors
* Teams will develop a ‘You said: we did’ approach to communicating with their PPI Contributors, including ‘We couldn’t do it as you suggested but we did do this’
* We will develop a reporting tool
 | * The survey will exist and be used. Feedback will be reported to teams and management groups
* We will be able to evidence feedback provided to PPI Contributors from a range of projects
* Reporting tool will be in use
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**Standard 5**

**Impact**

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| **The standard** | **Our aspirations on this standard** |
| To drive improvement, we capture and share the difference that public involvement makes to research.We can learn from both positive and negative impacts of public involvement in research. By sharing this learning we can improve what we do. | We will begin a process of systematic recording of the PPI that we undertake and ensure that it can demonstrate impact. Both public and staff will be able to demonstrate impact of public involvement. |

| **Indicator** | **What we are already doing well** | **What we aim to do / more of** | **How will we judge if we are improving?** |
| --- | --- | --- | --- |
| 5.1 We involve the public in the assessment of public involvement in research | * The CLAHRC Board has PPI Contributor members who assess the PPI element of projects in the CLAHRC
 | * We will run seminars in which PPI Contributors share their experiences of being involved to help researchers learn from this reflection
* We will develop mechanisms to enable PPI Contributors to provide feedback anonymously
* PPI reporting tools for staff and contributors have been developed
 | * Researchers and contributors will complete reporting tools
 |
| 5.2 We record our agreed purpose for public involvement and its intended outcomes | * In grant applications we routinely budget for PPI, explaining what we hope to achieve through this work.
 | * We will hold a departmental seminar on PPI benefits and impact
* Staff and contributors will complete the reporting tool, which asks for intended purpose and function of PPI and whether that has been achieved.
 | * There will be more reporting on PPI outputs and outcomes
 |
| 5.3 We collect information that will help us assess the impact of public involvement in research. | * We have case studies on our websites
 | * Teams will make PPI a mandatory agenda item at all meetings and revisit actions against this throughout the year in a reflective way, considering how their PPI work could be improved.
* We will encourage researchers to include their PPI work & its impacts in their publications
* When it becomes available we will encourage researchers to use the Working Together recording tool
 | * PPI Contributors will be asked at intervals during their involvement to feedback on their impact.
* Increasing numbers of publications will refer to PPI activity and impact
 |
| 5.4 We reflect, learn and report the extent to which we have met our intended purpose and predicted outcomes. | * We are developing a tool that uses the best elements of GRIPP2 and Research Fish for our researchers to record impact
 | * Teams will report on PPI on a 6 monthly basis (whether the funder asks for this or not)
* We will publish examples of the sort of impact that could be expected with the types of aims that could be held
* The organisation will encourage reflective learning from all PPI, including the impact on individual Contributors and staff
* We will develop a system for considering impact which allows for unintended consequences and open reflection – with the intent of a continual learning curve
 | * Teams will be encouraged to reflect at least annually on how PPI is working in their project and what could be improved
* There will be more examples of other team’s experiences available to researchers in a range of formats
* The annual random review with PPI Contributors (see 2.3) will include elements of reflection and this anonymised information will be fed into staff training and resources
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**Standard 6**

**Governance**

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| **The standard** | **Our aspirations on this standard** |
| We involve the public in our governance and leadership so that our decisions promote and protect the public interest.Public involvement in research needs visible leadership and clear lines of responsibility so that it is transparent and gains public trust. | Our PPI Contributors involved in governance will be more numerous and feel more empowered. |

| **Indicator** | **What we are already doing well** | **What we aim to do / more of** | **How will we judge if we are improving?** |
| --- | --- | --- | --- |
| 6.1 Public voices are heard, valued and included in decision making | * PPI is a standing item on management meetings in both the CLAHRC and NDPCHS
 | * We will encourage the involvement of more experienced PPI Contributors in our more strategic roles e.g. on NDPCHS Research Committee
* We will ensure that PPI Contributors in strategic roles are appropriately supported as they request
* We will incorporate public reviewers into all internal funding panels, e.g. SPCR, MIC, CEBM
* We will ensure that the contribution of PPI Contributors is minuted
* We will ensure that there are PPI Contributors on the interview panel for any PPI posts
* We will encourage the appointment of public co-applicants on funding bids.
 | * PPI Contributors in governance role will have an annual review
* In any feedback surveys to staff or the public we ask people to reflect on the PPI experience
* More internal funding panels will have public contributors
* More meetings will record PPI Contributions
* Researchers and PPI Contributors will make clear what a public co-app will bring to a project and appoint appropriately
* PPI Contributors will be on relevant staff interview panels
* Contributors will be involved in funding bids as co-applicants
 |
| 6.2 We have public involvement strategies and/or plans in place that we regularly monitor, review and report on | * Our PPI Strategies are publicly available on the websites
 | * PPI Contributors on Trial Steering Committees will agree with meeting Chairs whether it is appropriate for them to attend meetings and be clear about what their input will be
 | * Strategies will be reviewed with PPI Contributors and updated on websites
 |
| 6.3 Responsibility for public involvement is visible and accountable throughout our management structure | * We have a dedicated PPI Coordinator – 50% CLAHRC and 50% NDPCHS.
 | * We will challenge teams to consider who is the best person to chair a meeting as this could be the public contributor.
* We will report to NIHR the need to allow more time to do proper PPI in advance of funding application deadlines. Currently funding calls usually have short deadlines.
* We will make reports on research progress publicly available.
 | * We will routinely ask PPI Contributors if they have experience of chairing meetings and offer them opportunities to chair our meetings appropriately
* More reports on research progress will be publicly available
 |
| 6.4 We allocate money and other resources for public involvement. | * We include core PPI costs in all funding applications, and we always budget appropriately for PPI within projects
* We support the provision of PPI funding prior to grant approval through central funds
* We promote to all staff that NIHR will pay for PPI after a stage 1 approval (RDS)
 | * Teams will ensure that the PPI Liaison officer that they appoint to each project is given the time and resources to fulfil their role
* We will ensure that the good work of staff in involving the public is recognised as an important activity, as securing funding and publishing currently are. PPI Liaison officers on a team will be recognised and due resources given to their involvement work.
 | * Teams will know who their PPI liaison person is
 |