

Public and Patient Involvement Toolkit

This document lists our Involving People tools and resources that support our team and those we work with to plan and carry out effective patient and public involvement (PPI).

When to use	Resource	Its purpose
Engagement planning	Starter guide	<p>Involving people will help you make better decisions and provide better services. This short guide helps you start thinking about and planning how you can meaningfully involve people in commissioning the right health and care services for them.</p> <p>If you're new to PPI, we recommend reading our more comprehensive 'How to guide', which signposts to other resources and toolkits about how to do PPI and our 'Guide to commissioning', which covers how to plan PPI.</p>
	PPI design brief	<p>The design brief sets out your thinking about why you want to engage with people, what they can influence, who you will involve and how you will involve them. As part of our project brief, we ask project/engagement leads to think about how suitable their approach is and if any identified risks affect the engagement and objectives.</p>
	Equality Impact Assessment	<p>Ensure your approach is inclusive and non-discriminatory by completing an Equality Impact Assessment. You may have one completed for the project you're leading or are a part of, but we would recommend completing this simplified assessment specifically for your engagement strategy. This can be helpful to ensure you engage with the right groups in the right way.</p>

When to use	Resource	Its purpose
	Accessible Information Standard	<p>The Accessible Information Standard outlines how health and care providers can ensure inclusive communications, including to patients, carers and people with a disability and/or sensory loss. The recommended approaches should be adopted in both your communications as well as all your engagement activities.</p>
During Engagement	PPI governance checklist Organiser's checklist for involving people (in meetings or events) Participant's checklist for getting involved (in meetings or events) Participants' information sheet and consent form Participants feedback form	<p>This comprehensive list will help you double check and manage issues like safeguarding, risks, data and privacy.</p> <p>Briefing participants is important for the success of your involvement activity. Once you are clear why you are involving people and what their role will be, you can use this checklist to help you prepare them for their involvement.</p> <p>A quick checklist you can share with participants as part of their preparation to help them feel supported and prepared for the engagement activity.</p> <p>Informs people on what the engagement activity is about, what will be asked of them, how their personal information will be used and provides contact details. If you are conducting in person interviews, there is a consent form at the end that must be read and signed by the participant before the interview starts.</p> <p>An optional survey to be given to participants immediately or soon after they have shared their views and experiences, to help inform you about any improvements to this engagement process. This can be given as a hard copy, or if preferred, completed via email or using an online form.</p>

When to use	Resource	Its purpose
Analysis and report writing	Structuring your report	A quick guide about the key items for your engagement report. For examples of how we report our engagement findings, please see reports on our website .
	Top tips for responding well to feedback	Feedback from the public and patients about services comes in many forms and can be challenging. This guide shares tips on how best to respond, as how health and care organisations respond to that feedback can have a lasting impact on how people feel about the organisation and service, and their appetite to get involved again.
Post-Engagement	After action review	A simple but structured review amongst your project group to understand what worked well, what didn't work so well and what learnings/recommendations you will implement in future projects (read more here .) Creating a safe space is key to ensuring all people feel comfortable with sharing their feedback and can help teams really get to the root of any issues that arose. Involving People aims to complete these with the teams they work with after every project.
	Feedback form on PPI support	If you work with Involving People, we will share a survey to commissioners soon after a project has ended to get feedback about the support we've provided to help us improve.

We also provide training and development opportunities around patient and public involvement for staff, the public, patients and carers who may wish to influence services. Do get in touch if you are interested in exploring this with us.

Contact details

involvingpeople@helpandcare.org.uk
or visit www.involvingpeople.org.