

Checklist for Patient & Public Involvement

The rationale for Patient and Public Involvement (PPI) is that it is a prerequisite for developing patient-led services. This checklist provides a template for including patients, members of the community and people from organisations with an interest, in the work of the NHS.

Record of activity and tips for further guidance.

TIP

1. Identify your aims and why you want involvement

- Contact staff, patients/carers and others interested in the issue
May save time if this has already been done elsewhere – share best practice.
Aim to be inclusive and representative of the community.
- Meet with all of the relevant stakeholders to propose involvement
Be realistic don't promise outcomes that may not be achievable by this process.
- Secure the resources to support patients and the public who are involved
Resources may include; Travel, respite care, refreshments, interpreters, training, staff support at meetings or for vulnerable people, accessible premises etc.
- Plan the project or task together with stakeholders
How much involvement does each person want?

2. Involve people at all stages in a meaningful way

- Negotiate roles and responsibilities early on
Be clear, make notes and feedback. Invite someone from a patient perspective to Chair meetings.
- Provide accessible information and discuss the options
Are you only seeking opinion? If this is all you need at this stage then tell people.
- Use more than one method for involvement
Meetings, Focus Groups, Online discussions, Workshops, Discovery Interviews, Patient Stories.

3. Empower people to be part of the group

- Don't use jargon. Write and discuss everything in plain English
- Give people opportunities to discuss issues informally before meetings so that people understand what the options are
- Work as a team to save time and develop better services for patients and their families/carers

New ways of working need time – allow extra time.

Provide a phone number or meet with people before the start of a meeting.

Listen to people's experiences and act on what they say.

4. Sharing in the decision-making process

- Formally recognise the value of patients and the public being part of the decision-making
- Plan feedback and further improvement cycles
- Keep everyone who has been involved informed of the outcome
- Evaluate the process with all involved and thank everyone

Partnership working requires the commitment of all staff to work towards it.

Planning this now will help ensure everyone knows what happens after their involvement in this issue is complete.

Some people may wish to continue to be involved - is there a mechanism for this?

What has been learned and what would you do differently next time?

References and Further Reading

bmjlearning. Read, reflect, respond Module: How to involve patients in your practice
URL: <http://www.bmjlearning.com>

International Alliance of Patients' Organizations. Guidelines Patient Involvement.
URL: <http://www.patientsorganizations.org>

NHS Modernisation Agency. Improvement Leaders', Guide Involving patients and carers. 2005

User Involvement in Change Management: A Review of the Literature, Report to the National Co-ordinating Centre for NHS Service Delivery and Organisation R & D (NCCSDO), Mike Crawford et al., September 2003

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