

Yorkshire & Humber Patient Safety Translational Research Centre

A guide for working practices for patient and public involvement and engagement - May 2018

1. Introduction

This guide sets out the working practices for patient and public involvement and engagement activities (PPIE) for the Y-H PSTRC. This is to provide a clear approach for researchers and members of the public working within the centre. This includes the PPIE Lay Leaders, the Citizen Participation Group and the Q&S Patient Panel. The information within this guide is also presented in a 'quick look' document for easy reference (See Appendix 1).

The following areas are covered within this guide:

- PPIE groups within Y-H PSTRC
- Ways of communicating
- How to track PPIE activities
- How to reimburse for time and expenses
- General administrative items – booking transport

2. PPIE groups within the PSTRC

There are three different PPIE groups within the PSTRC. A brief summary of their purpose and role within the centre are outlined below:

i) PPIE Lay Leaders

We have five Lay Leaders that have been aligned to particular research themes within the centre. This is considered a flexible commitment in order to allow cross theme working opportunities. This role is primarily to support, advise and provide assurance to researchers with regard to PPIE activities within research themes for the centre. The Lay Leaders report to the PPIE research Lead for the centre and are accountable to the Y-H PSTRC Executive Board and also report to the Y-H PSTRC Advisory Board.

ii) Citizen Participation Group (CPG)

The purpose of this group is to provide an opportunity for researchers and clinicians to engage with a wider audience of people within Bradford, Leeds and the Yorkshire and Humber Region. Combined with PPI lay leaders it is anticipated that the CPG will help to reach hard to access communities, in which research projects may be especially relevant. The group will also be instrumental in helping to interpret translational research into an accessible and lay friendly format.

iii) Yorkshire Quality and Safety Research (Q&S) Patient Panel

This PPIE group was established over eight years ago to support the research within the YQSR group and currently consists of nine members. The panel represent a diverse group of people from

Bradford, with a strong interest in patient safety research. Many of the members are linked to various healthcare groups and advisory bodies at local and national levels. The panel remain an integral part of YQSR and are an additional resource for the centre, providing PPIE support and advise at all stages of the research process. The Q&S Patient Panel meet every two months at BIHR, 5-6.30 PM. If you would like to come and discuss any PPIE issues at a meeting, please inform Liz Thorp via email.

3. Ways of working

The Y-H PSTRC has a dedicated PPI research lead to support the research teams and members of the public involved in work within the centre, working two and a half days a week* (0.5 WTE). The purpose of this role is to support and develop PPIE efforts with a clear focus on active involvement, participation and engagement with patients, carers and the public underpinning all the work within the centre. There is also dedicated administrative support for the centre. If you have any queries at all about PPIE please contact:

PPI Lead for Y-H PSTRC*

Beth Fylan (Interim)

Programme Manager

Bradford Institute for Health Research,
Bradford Royal Infirmary, Duckworth Lane, Bradford, BD9 6RJ

Email: Liz.Thorp@bthft.nhs.uk

Telephone: 01274 38 3945

Y-H PSTRC Administrator

Carolyn Clover

Email: Carolyn.clover@bthft.nhs.uk

Telephone: 01274 38 3430

***Any queries via email will be dealt with as soon as possible. For any urgent requests please contact Carolyn Clover, if the PPI lead is unavailable.**

3.1 Ways of communicating

- PPIE Lay Leaders

Contact details for the lay leaders are available from Liz Thorp, Carolyn Clover and are available on the Quality and Safety shared drive at BTHFT under Y-HPSTRC PPIE folder. A link person within each research team will be identified as a main point of contact for PPIE lay leader and the PPIE research lead (See Table 1). If there are any changes to the link researcher please inform Liz Thorp.

Group	PPI Lay Leader	Link researchers
1 The central role of patients and their carers	Kate Smyth	Gemma Louch Gemma.Louch@bthft.nhs.uk
2 Creating workplaces that people want to work in	Max Mclean	Gillian Janes Gillian.Janes@bthft.nhs.uk
3 The safer use of medicines	Amit Bhagwat	Iuri Marques I.Marques@bradford.ac.uk
4 Using digital technology to improve safety	Naeem Sheikh	Carolyn McCrorie Carolyn.McCrorie@bthft.nhs.uk
Citizen Participation Group	Naveed Riaz	Liz Thorp Liz.thorp@bthft.nhs.uk

Table 1: Lay leaders and link researchers within Themes/PPIE Group

Citizen Participation Group and the Q&S Patient Panel

The PPIE researcher lead will liaise with the CPG and the Q&S Patient Panel directly in the first instance. Future projects may involve some or all of the members, and the best approach to contacting individuals or groups will be arranged as required.

3.2 Tracking PPIE activities

- For PPIE Lay Leaders:

The lay leaders will be provided with a proforma to record the type of PPIE activity, time spent on related PPIE activities, record specific action points to be taken forward and their own reflections about any PPIE related interactions or meetings (See Appendix 2). This will be either in an electronic or paper format, depending on the lay leaders individual preferences.

The activity tracker is intended to support the PPIE lay leads and researchers achieve their objectives within specific themes and projects. At three monthly intervals the lay leaders will review the activity tracker with the PPI research lead. This is to ensure that PPIE activities have been reasonable in terms of the time and commitment and to ensure expenses have been correctly reimbursed in the terms set out in the Lay Leader's role description. This will also allow for a close monitoring of short term and long term PPIE strategic objectives for the centre. This information will also be used at Y-H PSTRC Executive and Advisory board meetings and for annual NIHR reporting requirements. It is the responsibility of the PPI lead to add information to the overall PPIE activity tracker, available on the shared drive at BTHFT.

- For researchers:

The research team should also inform the PPIE researcher lead if there are any action points from theme meetings. This is in order to support the lay leaders and researchers to meet any actions identified in a timely and effective manner.

- Citizen Participation Group and the Q&S Patient Panel

The Citizen Participation Group and Q&S patient panel meetings are led by the PPI research lead. If you would like to involve either group please contact Liz Thorp. It is the responsibility of the PPI lead to add information to the overall PPIE activity tracker, available on the shared drive at BTHFT. This information will be used at Y-H PSTRC Executive and Advisory board meetings and for annual NIHR reporting requirements.

3.3 Payment and recognition for public involvement

A paper based expense claim form should be completed by the lay person at the end of a meeting or completed activity?(See Appendix 3). Completed expense claims forms can be submitted to Liz Thorp or Carolyn Clover to process payments. This is usually a direct BACS payment made to personal bank accounts.

If, you need vouchers please place a request with Carolyn Clover, a week before they are required.

The costs for routine meetings and PPIE activities are provided below:

PPIE Lay Leaders

- £20.00 per hour - this includes work done outside formal meetings i.e. pre-reading for meetings, writing bids etc.
- Reimbursement for any conferences, training or related PPIE events will be negotiated as required. Please contact PPIE researcher lead for support.

Citizen Participation Group

- £20.00 per session (up to 2 hours)
- Travel can be arranged for participants in addition to reimbursement for their time

Q&S Patient Panel

- £25.00 per meeting (routine meetings every two months - YQSR PPIE budget)
- £20.00 per hour for additional PPIE activities related to the Y-H PSTRC work

2.4 Travel arrangements

- **Carpark permits at BIHR**

Carpark temporary permits (Zone 3) for meetings at BIHR can be ordered via Liz Thorp or Carolyn Clover. **Please request at least 2 days before a meeting.**

NB. Owing to on-going demands with car parking spaces at BTHFT, meetings during peak work times (10.00-14.00) may be more difficult to arrange.

- **Parking spaces for blue badge holders** are available directly outside BIHR.
- **Taxis** can be pre- ordered using the 'docket taxi' system at BTHFT:
Email request to the front desk at BRI Front.Desk@bthft.nhs.uk (Tel: **01274 36 4024**) with the following details:
 - Name of passenger(s)
 - Pick up and drop off points, single or return journey
 - Time
 - Brief explanation for the taxi request e.g. Meeting for the YH PSTRC
 - Cost code for the centre (M24387)
 - **For return journeys, call the 'front desk' at BRI when the taxi is needed at the end of your meeting**
Telephone: 01274 36 4024

Alternatively, Liz Thorp and Carolyn Clover can pre-order taxis if requested 48 hours in advance of a meeting or event.

- **Train Travel** – Tickets can be booked directly with Carolyn Clover.

2.5 Hospitality and Refreshments

- Consider the time of the meeting and whether refreshments for PPIE members are required.
- There is a hospitality box located in Research Office 2 at BIHR for small meetings (up to 8 people). This includes mugs, plastic cups, a coffee press, teapot, napkins, paper plates, tea and coffee, sugar and sweeteners. You will need to provide milk, juice and any refreshments ahead of the meeting. There are hot and cold water jugs available in the exchange kitchen located on the ground floor of BIHR.
- For larger meetings at BIHR, meetings at University of Leeds and University of Bradford please order refreshments via Carolyn Clover.

Appendix 1: 'Ways of Working' – Y-H PSTRC PPIE

PPIE group	Communication	Tracking PPIE activities	Reimbursement procedure
<p>PPIE researcher Lead</p> <p>Liz Thorp Nurse Research Fellow PPI Lead for Y-H PSTRC, PACT and YQSR Bradford Institute for Health Research, Bradford Royal Infirmary, Duckworth Lane, Bradford, BD9 6RJ</p> <p>Email: Liz.Thorp@bthft.nhs.uk Telephone: 01274 38 3945</p> <p>Admin Support</p> <p>Carolyn Clover (Y-H PSTRC Administrator) Email: Carolyn.clover@bthft.nhs.uk Telephone: 01274 38 3430</p>		<p>The PPIE researcher lead will maintain an electronic record of all PPIE activities for the purposes of audit, Y-H PSTRC Executive and Advisory board meetings and for annual NIHR reporting requirements. This is available on the shared drive for the centre at BTHFT.</p>	<p>Return completed expense claim forms to Liz Thorp or Carolyn Clover (See Appendix 3).</p>
<p>PPIE Lay Leaders</p> <p>Individual preferences to be considered with regard to the best method of correspondence, for instance, email, Telephone, text messaging, etc.</p> <p>Within theme: A link researcher within a theme will be responsible for liaising with the Lay Leader and the PPIE researcher lead. Alert the PPIE research lead of actions that require</p>		<p>An individual activity tracker to be completed by PPIE lay leaders either as a paper based or electronic format (See Appendix 2).</p> <p>Any activities and related PPIE work for the Y-H PSTRC should be recorded. This is intended to support the PPIE lay leaders and research team to meet their objectives for specific projects.</p> <p>Any actions arising from theme meetings for the PPIE Lay Leaders should be shared with the PPIE researcher lead. This is in order to support the lay leaders to achieve their actions/objectives and</p>	<p>Complete expense claim form (Appendix 3).</p> <p>Costs:</p> <ul style="list-style-type: none"> £20.00 per hour - this includes work done outside formal meetings i.e. pre-reading for meetings, writing bids, out-reach work Conferences - expenses for events, travel and

	<p>support</p> <p>Across themes:</p> <p>The PPIE research lead will be the main point of contact for all PPIE members and researchers.</p>	<p>support the research teams to ensure that actions are conducted in a timely manner.</p> <p>The activity tracker will be reviewed with the PPIE researcher lead every 3 months to ensure that workload is reasonable and to monitor against objectives within the PPIE strategy for the centre.</p>	<p>accommodation to be agreed in advance between lay leader, research team and PPI lead.</p> <p>Please contact PPIE researcher lead for any support.</p>
<p>Citizen Participation Group</p>	<p>The PPIE researcher lead will liaise with the CPG directly. Future projects may involve some or all of the members, and the best approach to contacting individuals or groups will be arranged as required.</p>	<p>If you would like to involve the Citizen Participation Group please contact Liz Thorp. Email: Liz.Thorp@bthft.nhs.uk</p> <p>It is the responsibility of the PPI lead to add information to the overall PPIE activity tracker, available on the shared drive at BTHFT. This information will be used at Y-H PSTRC Executive and Advisory board meetings and for annual NIHR reporting requirements.</p>	<p>Complete expense claim form (Appendix 3).</p> <p>Costs:</p> <ul style="list-style-type: none"> £20.00 per session (up to 2 hours) Travel can be arranged for participants in addition to reimbursement for their time
<p>Q&S Patient Panel</p>	<p>The PPIE researcher lead supports the Q&S Patient Panel directly in the first instance. Future projects may involve some or all of the members, and the best approach to contacting individuals or groups will be arranged as required.</p>	<p>If you would like to involve the Patient Panel please contact Liz Thorp.</p> <p>Q&S meeting dates for 2018:</p> <ul style="list-style-type: none"> 17 May 5-6.30PM, BIHR 18 July 5-6.30PM, BIHR 27 September 5-6.30PM, BIHR 22 November 5-6.30PM, BIHR <p>It is the responsibility of the PPI lead to add information to the overall PPIE activity tracker, available on the shared drive at BTHFT. This information will be used at Y-H PSTRC Executive and Advisory board meetings and for annual NIHR reporting requirements.</p>	<p>Complete expense claim form (Appendix 3).</p> <p>Costs:</p> <ul style="list-style-type: none"> £25.00 per meeting (routine meetings every two months - YQSR PPIE budget) £20.00 per hour for additional PPIE activities related to the Y-H PSTRC work

Appendix 2 PPIE Lay Leaders Meeting & PPIE Activity Tracker

Type of Activity E.g. Attending meetings, preparation pre-meetings, writing, PPIE specific activities, CPG events	Date Time Place	Time spent on activity (hours)	Any comments/reflections about the activity

Appendix 3

Expenses reimbursement form v1

DETAILS

Name of Applicant:
Contact Tel Number:
E-mail Address:
Home address:

Bank Name and Address:

Name on account:
Sort Code:
Account number:

Travel Expenses

Method of travel E.g. car	Date	Details of meeting	Journey		Single/return	Amount claimed
			From	To		
					TOTAL	

(Please attach receipt, used train and bus tickets as evidence of journey)

Other Expenses

Expense E.g. cost of parking, carer	Date	Amount
		TOTAL £

(Please attached receipt, as evidence of expense)

Claimant Declaration:

I declare that the information given on this claim form is true and correct to the best of my knowledge. I understand that action may be taken against me if I make an incorrect claim. I consent to the disclosure of relevant information on this form for the purposes of fraud prevention, detection and investigation. I also confirm that by claiming car mileage I hold a valid driving licence, that the car has a current MOT certificate and is fully insured.

Name:

Signature:

Date:

Trust Authorising Officer

I confirm that this claim complies with the Expenses Guide and that the claimant has provided the necessary receipts to evidence this claim.

Name:	Signature:
Date:	
Cost code:	