

## APPROACH FOR PPI IN EVALUATION:



**Meaningful:** Demonstrate commitment to a culture of involvement

**Collaborative:** Define and agree involvement



**Supportive:** Provide appropriate support

**Accessible:** Identify and address accessibility needs

**Developmental:** Provide training and development opportunities



**Effective:** Enable effective communication

**Reflective:** Share your experiences and learning from involvement

**Ethical:** Uphold the ethics of involvement



# Evaluation Works

A toolkit to support commissioning of health and care services

For more information or support visit:

<http://www.nhsevaluationtoolkit.net/contact-us/>

Or for more information about Patient and Public Involvement please visit:

<http://www.phwe.org.uk> and <http://www.invo.org.uk>

Or for a handy toolkit: [http://www.phwe.org.uk/wp-content/uploads/2015/05/PPI\\_Toolkit.compressed.pdf](http://www.phwe.org.uk/wp-content/uploads/2015/05/PPI_Toolkit.compressed.pdf)

This leaflet has been produced by the West of England Evaluation Strategy Group (hosted by NIHR CLAHRC West) to support the spread of and best practice in evaluation across the region. With thanks to the UK Evaluation Society for financial assistance and to the South West Evaluator Forum members and public contributors in developing the guidelines. (May 2017)

**For our complementary leaflet and resources on 'Best Practice in the Ethics and Governance of Service Evaluation', go to:**

<http://clahrc-west.nihr.ac.uk/evaluation/>



**NHS**  
National Institute for  
Health Research

**Bristol Health Partners**

**NHS**  
University Hospitals Bristol  
NHS Foundation Trust



Public and Patient Involvement (PPI) in evaluation is where work “is carried out actively ‘with’ or ‘by’ people – rather than ‘to’, ‘about’ or ‘for’ them” <http://www.invo.org.uk>

# Guidelines for Patient and Public Involvement in Evaluation:

## Building and Sustaining a Culture of Involvement in Evaluation

This leaflet is available electronically and in printable format on the CLAHRC West website: search for Evaluation Guidelines or visit <http://clahrc-west.nihr.ac.uk/evaluation/>

## Introduction

These guidelines have been co-produced by patients, service users, public contributors, staff from voluntary, academic and statutory sectors and people working in evaluation and patient and public involvement. They have been developed to support anyone working in evaluation to embed patient and public involvement into their evaluation activities and to ensure that public contributors feel part of the team.

### Demonstrate commitment to a culture of involvement

Involve patients and the public from the very start of the evaluation project

Create real opportunities for people to be involved and have influence at all stages from development to dissemination

Understand and respect people's reasons and motivation for becoming involved

Promote and enable the voice of patients and the public at all stages of the evaluation

Promote involvement of patients and the public – from collaboration (as a minimum standard) through to co-production and co-creation

Acknowledge the contribution of patient and public representatives in any presentations or publication

### Support public involvement in evaluation

Identify the barriers and facilitators to involvement at an individual and project level

Build enough time into a project for meaningful patient and public involvement

Allocate time, funds and resources for involvement in the evaluation plan

Share the lessons learned around practicalities and process of involving public and patients in evaluation – what worked well and what can be improved

Share evidence of the impact of patient and public involvement in evaluation

### Define and agree involvement

Be clear about the differences between participation, collaboration, co-production and involvement and which one of these is most appropriate for your project

Produce job roles and define responsibilities collaboratively with patient and public group members, allowing for flexibility in these roles and responsibilities where appropriate

Produce Terms of Reference collaboratively with patient and public group members

### Provide appropriate support

Explore with patient and public group members what non-financial support is needed and available

Be clear about the financial support available (refer to the organisation's involvement payment policy)

Identify a named person at the centre of the project who will be available to support patient and public group members

Provide professional support to those involved including supervision and mentoring where necessary

Consider appointing two or more patients or members of the public to enable peer support

Adjust the pace and way of conducting the project when necessary

### Provide training and enable personal development

Identify and address any training and development needs for people to be involved in the evaluation

Provide training and development opportunities

Support people to attend events relevant to their involvement in evaluation projects

### Enable effective communication

Ensure clear communication between everyone involved in the project

Use accessible language for all communications

Avoid the use of, or explain jargon and acronyms

Adjust communication methods to suits people's available resources and preferences

Provide regular feedback

Provide information about the progress of the evaluation and lessons learned to all who take part

### Identify and address accessibility needs

Address people's accessibility needs

Ensure that all evaluation team members have access to the resources they need

Understand, accommodate and celebrate diversity

### Uphold the ethics of involvement

Ensure processes are in place to protect all involved in the evaluation

Ensure organisational policies and procedures on data protection and information governance are respected

Be transparent

Manage expectations around change as a result of the evaluation, and the impact that might have on those involved

