

# A guide to Personal and Public Involvement (PPI)

## Checklist for involvement

This guide is designed to help you understand and incorporate Personal and Public Involvement (PPI) in your work. It is applicable to involvement at a project level.

Use this checklist at a planning meeting to help guide your discussions. You can use the column on the left to consider how to effectively engage service users and carers during the planning, doing and reviewing stages. Use the column on the right to plan and record how you will do this.

This checklist will form the basis of the Involvement Plan

**Area of work or project name:** .....

Checklist	Actions
<p><b>Planning</b></p> <p>Be clear about why you want to involve people and how this will affect the area of work and influence decision making.</p>	
<p>Be clear about what elements of your project are open for discussion – be clear how involvement can influence decisions.</p>	
<p>Consider if there will be different impacts on different groups. This will help identify who needs to be involved (including Section 75 groups) and the questions that need to be asked.</p>	
<p>Identify any other previous involvement/ engagement activities that could inform your work to avoid duplication.</p>	
<p>Identify available resources (staff, finance, technology, time etc).</p>	
<p>Agree the process for developing the Involvement Plan.</p>	

Key

Planning

Doing

Reviewing

<http://engage.hscni.net>



PPI - Involving you, improving care



Checklist	Actions
<p><b>Doing</b></p> <p>Identify suitable methods to engage service users, carers and the public eg steering, reference or focus groups, online methods, surveys, interviews etc. Consider how service users and carers can co-design the involvement process.</p>	
<p>Raise awareness and engage with target audience eg through advertisements such as posters in clinical areas or via social media such as twitter or facebook.</p>	
<p>Identify any support required for participants to enable effective involvement eg training and mentorship, sensory support, information etc.</p>	
<p>Develop Terms of Reference and Role Description for service users and carers who are getting involved.</p>	
<p>Adopt an open, transparent, cooperative approach to ensure all service users and carers feel listened to and empowered to actively participate by ensuring all relevant parties understand their roles.</p>	
<p>Ensure decisions and developments are based on evidence including service user and carer input.</p>	

Checklist	Actions
<p><b>Reviewing</b></p> <p>Identify the impact of involvement. Has the involvement had an impact? For example quality improvement, greater involvement, improved safety or better communication.</p>	
<p>Provide feedback to all involved.</p>	
<p>Explain how the involvement process and information gathered has influenced the decision taken.</p>	
<p>Review the involvement process and learn lessons for the future.</p>	

Key **Planning** **Doing** **Reviewing**