

# GREAT

## STAFF CHECKLIST

Quality Improvement (QI) is about making Health and Social Care (HSC) services safe, effective, patient-centred, timely, efficient and equitable. Involving service users and carers is a key principle of quality improvement.

Personal and Public  
Involvement (PPI)



Involving you,  
improving care

## WHAT DO I NEED TO CONSIDER?

## WHAT DO I NEED TO DO?

# G

### Getting started

Who should be involved - consider who the QI project will impact on and who has 'lived experience' to share?

Do you know how to identify service users and carers that can help?

What are the benefits of engagement?

- Share the GREAT Checklist for service users and carers, available at HSCQI website.
- Link with your organisation QI Lead and PPI Lead.
- Engage with service users and carers by identifying people that are already known to your team or via existing community links within your team/organisation – the PPI Lead can advise on this.
- Be clear about the service user and carer role - develop a **role description** - avoid tokenism.
- Together with service users and carers develop an **Involvement Plan** and agreed timeframe.
- Identify a point-of-contact within the team for service users and carers to link with.
- Be aware of other options for involvement that may be more appropriate to suit service user and carer needs – link with the PPI Lead for this.

# R

### Reimbursement

What is the HSC reimbursement guidance?

- Familiarise yourself with the **HSC Reimbursement policy** for out-of-pocket expenses.
- Give a claim form to all service users and carers involved.
- Approve and send completed claim forms to your finance department, within 1 week of receipt.

# E

### Expectations

How can you involve a range of stakeholders?

Be clear about the boundaries - how much work can service users and carers be involved in?

How do I build relationships that support participation?

- There are lots of different ways to involve people – check out the guide **different ways to involve**. As part of the Involvement Plan, do consider a range of processes at different stages.
- Identify how much support and time the team can provide.
- Support people to build their capacity to get involved – **check out learning opportunities**.
- Develop agreements for formal involvement activity such as **eg terms of reference or meeting etiquette guidance**.
- Plan for involvement activities ie set dates in advance to allow service users and carers adequate time to make plans to attend. Send information in advance via email or if requested by post. Ensure meeting locations are accessible ie disability access, location map and options for virtual access, including telephone or video call facilities.
- Establish a feedback process for all involved to share achievements and disappointments.

# A

### Achievements

What outcomes do you want to achieve from involving service users and carers?

How do you demonstrate that you value the contribution which service users and carers are making?

- Establish an evaluation process to determine how involvement has made a difference.
- Record the involvement journey to evidence participation and consider what you could change next time.
- Share best practice and achievements - nominate your work for awards.
- Submit a case study on Engage website.

# T

### Training

Learning and support required - what is needed for people to get and stay involved?

- Provide induction training.
- Consider learning opportunities available for staff, service users and carers on Engage website.
- Develop an overview of the programme of work and who will be involved. Do not use jargon.
- Training needs to be flexible and adaptable and may include project-specific training.
- Offer mentoring or coaching to support development and ongoing engagement.

Notes

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**For information on involvement:**

go to <http://qi.hscni.net>  
check out <http://engage.hscni.net>  
or contact your HSC organisation's PPI Lead



ENGAGE



HSCQI