

Personal and Public Involvement (PPI)



Preparing a Terms of Reference for Involvement

This guide is designed to help you develop a Terms of Reference for an Involvement project at any level. Elements of this guide may be used to consider the key areas required to effectively involve Service Users and Carers. The suggestions may be incorporated into existing group Terms of Reference, or a separate engagement contract/arrangement may be developed to reflect the Service User and Carer role and Involvement in groups. Not all sections will be relevant and can be adapted for particular situations.

The column on the left lists areas to consider when developing a Terms of Reference, the column on the right lists examples and things to be considered.

Consider	Examples
Background	<ul style="list-style-type: none">• Set out concisely the background to the work area and group.
The aim and objectives of the group	<ul style="list-style-type: none">• Aim – overall purpose of the group.• Objectives – steps the group will take to meet the aims.
The purpose of the Service User and Carer Involvement	<ul style="list-style-type: none">• To provide Service User and Carer input into plans/decisions.• To utilise Service User and Carer expertise, knowledge and skills.• To inform, shape and influence plans/decisions.
The role of the Service User and Carer	<ul style="list-style-type: none">• To share experience, knowledge, insight and expertise.• To review and comment on papers, proposals and plans.• To bring issues/concerns from Service Users and Carers to the group.• To represent and provide a Service User and Carer perspective.• To feedback to a Service User and Carer constituency.
Membership of the group	<ul style="list-style-type: none">• List individuals/organisations invited and agreed to be involved in the group.• Length of commitment to correlate with nature of Involvement – one-off meeting, Task and Finish groups, Focus Group, Steering Group, etc.• How to refresh membership.

KEY

Planning

Doing

Reviewing

<http://engage.hscni.net>



PPI - Involving you, improving care



Consider	Examples
What is expected of members	<ul style="list-style-type: none"> • Time commitment for reading/reviewing materials and attending/participating in meetings. • To actively participate/contribute. • To comply with the code of conduct. • Conflicts of interest are identified. • Confidentiality is respected. • Commitment to the core aim of area of work. • Act with integrity. • Respect and value the input of all group members.
Period of engagement	<ul style="list-style-type: none"> • Specific timeframe or project lifespan. • Agreed end date.
Costs/expenses incurred	<ul style="list-style-type: none"> • Out of pocket reimbursement policy and time-frame for submitting claims and paying expenses. • Consider a remuneration option. • Room requirements and additional costs involved. • Facilitation or advocacy costs.
Administration arrangements to support Involvement	<ul style="list-style-type: none"> • Induction. • Information and training provided. • Agreed support provided, e.g. prior preparation for meetings, debriefing, etc. • Meeting dates agreed in advance. • Arrangements in place to facilitate access to information/documentation, e.g. password protected access to website, email, hard copies. • Accessibility options – teleconference, video conference. • Glossary of terms. • Communication arrangements/preferences email hard copy material, etc. • Agreed frequency and location of meetings.
How the Involvement project will be evaluated	<ul style="list-style-type: none"> • Regular questionnaires. • Online surveys. • Workshops • Independent evaluation
Values to adhere to	<ul style="list-style-type: none"> • Respect. • Commitment. • Listening to others. • PPI Standards.
Methodology for recruitment	<ul style="list-style-type: none"> • An open call with appropriate methods that reflect the Involvement opportunity. • Utilise existing Service Users and Carer Involvement groups. • Identify key stakeholders and organisation(s)

Top Tip

It may be useful to develop a 'we will' and 'you will' approach to this to demonstrate the partnership approach for your Involvement opportunity.

For more information on Involvement, Co-Production and Partnership Working please visit the Engage website.

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