

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
For the staff leading on the Involvement project have you completed your Involvement e-learning module and visited the Engage website?	
Be clear about what levels and area of Involvement your PPI activity will focus. Also have a clear start and end date.	
Consider why you want to involve people and how this will affect the area of work and influence decision making.	
Be clear about what elements of your project are open for discussion – be clear how involvement can influence decisions.	
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.	

KEY

Planning

Doing

Reviewing

<http://engage.hscni.net>



PPI - Involving you, improving care



Checklist	Actions
Identify any other previous Involvement/engagement activities that could inform your work.	
Identify available resources (staff, finance, technology, reimbursement, remuneration, time etc).	
Agree the process for developing the Involvement Plan.	
Consider how you will measure and determine the impact of the Involvement project (questionnaire/testimonials etc).	

Checklist	Actions
Engage with Service Users and Carers to help identify suitable methods to involve Service Users, Carers and the public, e.g. steering group, reference or focus groups, online methods, surveys, interviews, etc. Consider how Service Users and Carers can co-design the Involvement process with you.	
Raise awareness and engage with target audience e.g. through advertisements such as posters in clinical areas or via social media such as Twitter or Facebook.	
Identify any support required for participants to enable effective Involvement, e.g. training and mentorship, sensory support, information etc.	
Develop a Terms of Reference and Role Description for Service Users and Carers who are getting involved. You may want to consider adopting a “Code of Conduct”.	
Adopt an open, transparent, co-operative approach to ensure all Service Users and Carers feel listened to and empowered to actively participate by ensuring all relevant parties understand their roles.	

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Ensure decisions and developments are based on evidence including service user and carer input.	

Checklist	Actions
Identify the impact of Involvement. Has the Involvement had an impact? e.g. example quality improvement, greater involvement opportunities, improved safety or better communication.	
Provide feedback and use appropriate feedback mechanism to all involved.	
Explain how the Involvement process and information gathered has influenced the decision taken.	
Review the Involvement process and learn lessons for the future. You may want to consider the following reflective questions: <ul style="list-style-type: none"> • What went well? • What can be improved? • Can we develop further Involvement opportunities? 	

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

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