

### Tips sheet:

#### Recruiting members of the public to get involved in research funding and commissioning processes

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This tips sheet aims to offer some practical advice for people who are planning to recruit members of the public to patient and public involvement<sup>1</sup> roles in research funding and commissioning processes, such as reviewing research funding applications or being members of research advisory panels and boards.

The tips sheet has been produced by INVOLVE ([www.invo.org.uk](http://www.invo.org.uk)) working with members of the Public Involvement Collaboration Group. This Group is facilitated by INVOLVE and brings together the patient and public involvement leads of many of the National Institute for Health Research (NIHR) programmes and others, to work on research funding and commissioning issues of common interest, and to share knowledge, resources and good practice.

These tips consolidate knowledge and lessons learned by members of the Public Involvement Collaboration Group. They are largely based on the development of recruitment processes within the NIHR research programmes and are not intended to provide a comprehensive guide to recruitment.

INVOLVE's online 'Resource for researchers' provides more generic information on recruiting members of the public to patient and public involvement roles. This includes 'Briefing note six: Who should I involve and how do I find people?' ([www.invo.org.uk/posttypesresource/how-to-find-people-to-involve/](http://www.invo.org.uk/posttypesresource/how-to-find-people-to-involve/)). A special supplement on how to find people to involve in research will be published by INVOLVE in 2012. These documents and other resources can be accessed from the 'Resource centre' on INVOLVE's website ([www.invo.org.uk/resource-centre/](http://www.invo.org.uk/resource-centre/)).

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<sup>1</sup> INVOLVE defines public involvement in research as research being carried out '**with**' or '**by**' members of the public rather than '**to**', '**about**' or '**for**' them. This includes, for example, working with research funders to prioritise research, offering advice as members of a project steering group, commenting on and developing research materials, undertaking interviews with research participants. ([www.invo.org.uk/find-out-more/what-is-public-involvement-in-research/](http://www.invo.org.uk/find-out-more/what-is-public-involvement-in-research/))

The tips cover six topic areas and are grouped in response to frequently asked questions about:

1. Planning
  2. Advertising
  3. Selecting
  4. Appointing
  5. Supporting
  6. Moving on
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## 1. Planning

### How do we start?

- ✓ Make a plan. Take time, right at the beginning, to think through the steps that are involved not only in the recruitment process but also in the provision of ongoing support after you have recruited and even up to the point at which an individual's appointment comes to an end. It may seem like a slow way to start. But working with a clear schedule and agreed milestones makes it more likely that you will identify and avoid potential pitfalls further along in the process.
- ✓ You may find it helpful to refer to the standards of behaviour promoted by the Nolan principles (the seven principles of public life - [www.public-standards.gov.uk/Library/Seven\\_principles.doc](http://www.public-standards.gov.uk/Library/Seven_principles.doc)).
- ✓ Be clear about the policy framework (if any) within which you are appointing people to public involvement roles. If you have a local policy or procedure for this, you will need to follow it.
- ✓ Think about other people, both in and beyond your organisation, that you might need to consult and / or work with on this. For example, this could include people who have been involved in similar recruitment processes, or colleagues who deal with finance or staff recruitment. Are there any champions who can help you to promote this activity in and beyond your organisation?
- ✓ Identify both the resources that you will need and the resources currently at your disposal, not only for the process of recruitment but also to provide ongoing support. What is your budget? What is your timescale?

### How do we find the 'right' person?

- ✓ Be very clear about the requirements of the role. What is it that you want this person to do? Identify the skills, experience and personal attributes that they will need to have. For example, do you want someone with experience of a particular health condition or with experience of patient and public involvement or from a specific community? Do you need someone who is able to attend regular meetings or can their involvement take place from home? Thinking about all such issues at an early stage helps focus the rest of the recruitment process.
- ✓ Getting a close match between the requirements of the task and the individual performing the task is really important. Develop a detailed role description and person specification. You will need these as part of your advertising materials.

- ✓ Make sure that all those involved in making the appointment decision have an opportunity to contribute to developing the role and person specifications.
- ✓ In 2012, INVOLVE will be publishing some examples of role descriptions and person specifications that have been used ([www.invo.org.uk/resource-centre/resource-for-researchers/browse/?content=Template](http://www.invo.org.uk/resource-centre/resource-for-researchers/browse/?content=Template)).

### **How do we manage people's expectations of their role?**

- ✓ As part of advertising materials, create a background information document that clearly spells out your expectations of the role, explaining the purpose and intended impact of involving patients and the public. This will help applicants to understand the remit of the role. It may also be helpful when you are explaining the role to others in your organisation.
- ✓ Make sure you cover the basics, such as:
  - Is this an open-ended opportunity or is it a role with a fixed term of office?
  - What is the nature of the commitment? How much time will be required to fulfil the role?
  - For reviewing roles, what is the likely frequency of the review opportunities?
  - Does the role require travel or attendance at meetings on set dates or can the work be carried out from home within a set period of time?
  - What support will be provided? Is there an induction process and are there any opportunities for training or peer support?
  - What payment of fees is offered and what kinds of expenses will be reimbursed? What is the process for claiming fees and expenses?
  - What are the lines of accountability?
- ✓ Provide the terms of reference for a group if they already exist. Members of the public are most often appointed to be members of a panel or board on exactly the same terms of reference and the same terms of office as all other members. However, you may need to develop different support mechanisms to ensure that patient / public members can fully contribute, such as providing tailored guidance materials or offering individual support or mentoring.
- ✓ Be aware of the difference between recruiting someone to perform a specific task (for example to be a member of a commissioning panel) and recruiting to pool of people who may be invited to be involved in future (for example to review funding applications or comment on draft documents). The recruitment process needs to be appropriate to the role. For example, you may need a more formal recruitment process for board and panel appointments.

## **2. Advertising**

### **What is the best way to advertise?**

- ✓ Be clear about who you want to target. The methods you use for making contact with one group of people might not be appropriate for another. For example, social media can be particularly useful to contact young people. It may also be particularly useful in recruiting people with knowledge and experience of more sensitive or obscure topics.
- ✓ Consider using: email cascades, mail shots, websites, social media, libraries, local media / free press and word of mouth.

- ✓ Ask colleagues for help. What have they found to be particularly successful in the past and why?
- ✓ Consider keeping a contact list of people who have applied unsuccessfully for other public involvement roles. Remember that you will need to obtain people's permission to retain their contact details.
- ✓ Remember to ask people how they found out that you were recruiting, so you can use this information to inform the process next time around. You can incorporate this as a question in the application form.

### **How can we widen the pool of people that we involve?**

- ✓ You don't need to start from scratch. You probably already have a number of contacts and sources of information that you can use as a springboard to develop links to a broader range of people.
  - ✓ Consider:
    - Tapping into the knowledge and experience of colleagues who have already involved patients or the public, for example, are they already part of any networks that they could help you to access?
    - Linking up nationally and regionally with other NIHR organisations who share your interest in public involvement in research, for example Research Design Service, Clinical Research Network, Collaborations for Leadership in Applied Health Research, Biomedical Research Centres and Units and so on.
    - Developing and sustaining relationships locally with health and social care organisations, patient / support groups, Local Involvement Networks and community groups.
    - Working with colleagues in other organisations to develop and sustain relationships with voluntary sector organisations, support groups, charities and so on. This is an important and resource intensive activity so pooling of resources and shared activity makes sense.
    - Developing contacts in organisations and communities that represent or service particular groups or populations that are under-represented in your public involvement activities.
    - In future, social media and social networks may provide opportunities to extend the reach of organisations to make contact with a wider range of people.
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## **3. Selecting**

### **How can we ensure that we select people who have the skills and expertise that we are looking for?**

- ✓ Develop a selection process that is appropriate to the role.
- ✓ If you are going to interview applicants, shortlist those you wish to interview against the person specification in the same way as you would for recruiting a member of staff. Ideally the person who has responsibility for the public member should be part of the shortlisting and interview panel.
- ✓ Consider the pros and cons of conducting interviews face-to-face or by telephone.

- ✓ Consider incorporating selection activities other than, or in addition to, application forms and interviews. For example, if the role is for a panel member it could be useful to run a short group exercise that replicates part of a panel meeting. Or if the role is for a reviewer, you could ask applicants to discuss a sample review.
  - ✓ If you are using an application form, make sure that the questions elicit relevant information in relation to the person specification you have provided. This could either be done by asking detailed, tick box questions or by profiling based on more open ended questions.
  - ✓ Be clear to distinguish between the knowledge, skills and experience that an individual is expected to bring with them (as described in the person specification) and the knowledge, skills and experience that they will have the opportunity to develop when they have been appointed to the role.
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## **4. Appointing**

### **What do we need to do once we have selected someone for a role?**

- ✓ Be aware that some people may reject your offer of a patient and public involvement role. If possible, it is helpful to establish why they have come to this decision.
  - ✓ This is the point at which to confirm the basic 'terms and conditions' of involvement.
  - ✓ When you appoint a member of the public to a specific role such as membership of a board, panel or committee, provide them with written confirmation of their appointment and their period of tenure.
  - ✓ People who are recruited to roles as reviewers or potential reviewers will also benefit from having the nature of their commitment 'confirmed in writing (possibly by email).
  - ✓ Be prepared to respond to people who request feedback on why they were not selected.
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## **5. Supporting**

### **How do we know what help people will need?**

- ✓ One size doesn't fit all. Recognise that different people will have different needs. However, provide all new recruits with some core, introductory information that they can refer back to. For example, develop a welcome pack of information about your organisation and key contacts, their role, useful resources and so on.
- ✓ Hold an induction meeting or event. For example, this could take the form of an individual phone call or a group workshop. As part of this, make time for people to identify their own support and training needs and use this information to negotiate with them on how these needs can, or possibly cannot, be met. Aim to repeat this process at regular intervals as people's needs are likely to change over time.

## **What kinds of support do people find helpful?**

- ✓ Being offered briefings before, and debriefing after, events and meetings. For example, it can be helpful to discuss any queries or agenda items on the phone before a meeting, once the meeting papers have been circulated.
- ✓ For involvement in a panel, committee or board, having the support of the chair is helpful. (Some practical guidance for chairs is referenced in the final section of this document.)
- ✓ Having a mentor or buddy – this could be someone with knowledge and experience of similar patient and public involvement roles or someone offering other expertise, such as scientific knowledge.
- ✓ Having a dedicated member of staff specifically tasked with supporting people in such roles.
- ✓ Having facilitated support meetings for people in similar or related roles.
- ✓ Being part of an informal peer support network such as an email distribution list. This doesn't necessarily need to be hosted or moderated by you.

## **What kinds of training do people find helpful?**

- ✓ Being informed about a range of resources - documents, websites, podcasts, videos and so on – that can be accessed as and when the need or wish arises.
- ✓ Being offered the opportunity to attend relevant courses, workshops or conferences.
- ✓ Spending time shadowing people in similar roles in the same or similar organisations.

## **How do we keep people involved?**

- ✓ Build and sustain relationships over time.
- ✓ It is good practice to regularly give and receive feedback, for example to highlight strengths and skills, acknowledge and value contributions, reflect on impact and identify and address any problems as they arise.
- ✓ Keep in touch. Provide people with news and updates. You can use a variety of communication methods such as individual phone calls and emails, email discussions, updates or newsletters.
- ✓ Make sure all the practical aspects of involvement work well. For example, ensure fees and expenses are paid promptly so people are not left out-of-pocket for long. (Guidance on the payment of fees and expenses is available from INVOLVE and referenced in the final section of this document.)

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## **6. Moving on**

### **What do we do when someone's term of office comes to an end or they decide to stop being involved?**

- ✓ Say thank you. Acknowledge their personal contribution and the value that your organisation places on patient and public involvement, in whatever way is most appropriate. For example, this could be a letter or card of thanks from the director of your organisation or the chair of a board or panel.

- ✓ Consider developing an optional 'exit interview'. This could take the form of a simple questionnaire, a telephone conversation or a face-to-face meeting. It is an opportunity to learn from people's experience and to gather views on what is working well and what could be improved.
  - ✓ Encourage people to keep in touch. Develop a pool of contacts who you can access for future involvement opportunities.
  - ✓ Encourage people to find out about other opportunities for involvement, for example by searching for opportunities on the People in Research website ([www.peoplinresearch.org](http://www.peoplinresearch.org)) or providing a list of other organisations that regularly recruit people to patient and public involvement roles.
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## Further information

### INVOLVE publications:

#### **Briefing note six: Who should I involve and how do I find people?** (2012)

INVOLVE. Available from: [www.invo.org.uk/posttypresource/how-to-find-people-to-involve/](http://www.invo.org.uk/posttypresource/how-to-find-people-to-involve/)

#### **Payment for involvement: A guide for making payments to members of the public actively involved in NHS, public health and social care research** (2010)

INVOLVE. Available from: [www.invo.org.uk/posttypepublication/payment-for-involvement/](http://www.invo.org.uk/posttypepublication/payment-for-involvement/)

### Other publications:

**Patient and Public Involvement Toolkit** (2011) Julia Cartwright and Sally Crowe, Wiley-Blackwell [http://eu.wiley.com/WileyCDA/WileyTitle/productCd-1405199105\\_descCd-tableOfContents.html](http://eu.wiley.com/WileyCDA/WileyTitle/productCd-1405199105_descCd-tableOfContents.html)

Part of a series of toolkits and including sections on involving the right people, recruitment and networking, methods for recruitment, and support and training for participants and professionals.

**Patient and public involvement (PPI) in research groups – Guidance for Chairs** (2010), TwoCan Associates. Available from:

[www.twocanassociates.co.uk/perch/resources/files/GuidanceForChairs2.doc](http://www.twocanassociates.co.uk/perch/resources/files/GuidanceForChairs2.doc)  
Guidance written to assist chairs of research groups that have patient / public members.

**An evaluation of the process and impact of patient and public involvement in the advisory groups of the UK Clinical Research Collaboration** (2009) UKCRC/ TwoCan Associates. Available from: [www.ukcrc.org/index.aspx?o=2384](http://www.ukcrc.org/index.aspx?o=2384)

This report includes a description of the process of recruitment and also contains a large appendix of recruitment materials such as newspaper advertisements, forms, interview questions and an induction day programme.

## Useful websites:

For information about opportunities for members of the public to get involved with National Institute for Health Research (NIHR) research programmes:

- **NIHR Central Commissioning Facility**  
[www.ccf.nihr.ac.uk/PPI/Pages/default.aspx](http://www.ccf.nihr.ac.uk/PPI/Pages/default.aspx)
- **NIHR Evaluation Trials and Studies Coordinating Centre**  
[www.netscc.ac.uk/getting\\_involved/](http://www.netscc.ac.uk/getting_involved/)

## People in Research ([www.peopleinresearch.org](http://www.peopleinresearch.org))

A resource to help members of the public find opportunities to get involved in research and for research organisations / researchers to advertise involvement opportunities.

## INVOLVE ([www.invo.org](http://www.invo.org))

For further information about INVOLVE and public involvement in research.

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INVOLVE is a national advisory body that is funded by the National Institute for Health Research to support public involvement in NHS, public health and social care research and development.

If you would like to know more about what we do, please contact us:

### INVOLVE

Wessex House  
Upper Market Street  
Eastleigh  
Hampshire  
SO50 9FD

Web: [www.invo.org.uk](http://www.invo.org.uk)  
Email: [admin@invo.org.uk](mailto:admin@invo.org.uk)  
Telephone: 02380 651088  
Textphone: 02380 626239

If you need a copy of this publication in another format please contact us at INVOLVE.

Email: [admin@invo.org.uk](mailto:admin@invo.org.uk)

Telephone: **02380 651088**

Textphone: **02380 626239**

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