

## How to organise an Involvement workshop

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The following is a checklist of things to assist with planning and delivering involvement workshops. It deals with planning, admin and delivery to support the wider research plans that each project brings.

### Identify people to recruit:

- Existing mailing lists / known contacts
- Public Face (contact Shahnaz Aziz)
- Other groups / networks including social media

### Identify date and venue (with suitable access, parking and other requirements)

- Send out 'save the date' at least a month in advance (or full invites if ready)
- Check venue in advance by visiting it, to make sure that room size and shape are amenable to the type of event being held (e.g. room for different groups of people to sit round tables without being squashed – including space for catering)
  - o Is a quiet space needed, for if people need to take time out? If so, where can they go, from the venue?
  - o Is there space to open the venue out at lunch at all, or take walks round campus? People might appreciate the opportunity to get fresh air. It's worth scoping this out.
- Is it hard to find, and will you need to put up directions posters on the day, or have people waiting at the entrance to signpost guests?

### Coordinate invites – checking:

- Attendees
- Dietary requirements
- Access requirements
- Other requirements
- Send details of venue with map and info on parking
- Send details of involvement fees / travel expenses, how and when they'll be reimbursed (with likely timeline of repayment, to help people identify whether travel expenses are doable)
- Travel expenses:
  - o Offer up-front travel (e.g. by train) where people have identified they can't afford to bear costs themselves for up to five weeks
  - o Offer taxis on account to people who have mobility problems or other forms of frailty and have asked for help with travel (can be booked by Rebekah Marong). These are offered depending on where someone lives and whether it's feasible within the project budget.

### Catering and refreshments:

- Book more than two days in advance (if UoN delivered catering) ensuring that you have all dietary requirements.

- Think about whether you'll want drinks to be refreshed at any point during day (e.g. drinks in both morning and afternoon; additional water at lunch etc.)

**On the day:** things to take into account over and above the activities you want to do:

- Do you need facilitators for each table, or for the event more broadly?
- Do you need any general gophers, to do unexpected tasks that might crop up?
- How will you record what people are saying/doing?
  - o E.g. note takers? Are they writing notes that you will photograph? Audio recording? (and if so, will the room's noise levels be appropriate)?
- Are consent forms necessary? For recording data? Also for photos if taking?
- Make a register, to check who is attending and who's arrived (can also be used to confirm whether people consent for photos if taking)
- Take expenses / fee forms; identify who's responsible for collecting these in (it can be helpful to do these at lunch while people have time to ask questions that crop up).
- Name badges – bring stickers and bold pen
- Do you need other equipment, such as flip charts, giant coloured post-its, pens, booklets/paper?
  - o Will you need any materials / handouts printing, in advance?
- Allow time for introductions, including people getting to say a bit about themselves if they want. Do you want to frame this i.e. state what you'd like them to say?
- Do you want any ice breakers?
- Do you want any tasks to orient people to what will be expected of them? This can be looking at strengths, things we share in common, how we can work together etc. (according to aims of workshop)
- Do you want any lived experience speakers to talk about what they bring, or about their role in the event, so that participants are aware the event is being co-delivered by people with whom they share things in common?
- Have you allowed for breaks during the day, to account for fatigue?
- Have you allowed time for people to talk about the matter in a way that isn't rushed or pressurised?
- Thank people at the end!
- Tell people what the next steps are, and whether they'll get feedback about the workshop and its impact (and ask who wants to continue to be involved, if relevant)

**After the event:**

- Process fee / expenses forms!
- Send an email to thank participants
  - o Invite feedback from people, offering the chance to do it by email, phone or even face to face if they'd like (and follow this through!)
  - o Probably worth saying a rough timescale in which fee/expense payments will be received (roughly 4-5 weeks, depending on project)
- Keep a list of those who want to remain involved (if relevant)
- Make a note of any learning points, to be fed back to wider teams