

How to train the public for involvement



Introduction

Several training courses have been designed and delivered to help patients and the public prepare for involvement activities across the range of health and social care settings. This paper has been written to share what we have learnt about this in the East Midlands. The main part of this guide sets out some general principles and values that should shape training, and an appendix lists some local, national, and international courses that might provide a stimulus or template for local initiatives.

This guide was drafted by a group called Together by the [East Midlands Academic Health Science Network](#) as part of its work on Public Leadership. As readers provide feedback, further insights will be used to update the guide.

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A note on language and the reach of this guide

In this guide, we use the term 'public' to mean patients, service users, carers, and other members of the public. While we recognise that learning happens in a wide variety of contexts, the heart of this guide focuses on training which is intentional and planned rather than spontaneous and informal and takes place with a group rather than an individual. It is often a programme delivered over several sessions, rather than a single event. Whilst many training events may welcome learners from different backgrounds, including people who are employed as academic researchers or clinical staff, this guide focuses on training programmes that are targeted towards members of the public.

Who needs to be trained?

Some would prefer to train professionals in how to engage the public¹, rather than training the public themselves. Others choose to run every training event for a mixed group of learners comprising both professionals and the public, so that all stakeholders end up with a shared understanding. This guide explains how to train patients and the public for involvement and offers links to further advice on this topic². However, we believe that an approach which trains the public but ignores the learning needs of professionals is likely to fail.

Specific audiences have been trained for involvement, including older people³, people with learning disabilities⁴, care leavers⁵, people with arthritis⁶ and people with mental health issues⁷.

A supportive context

For training to deliver maximum benefit, several other things need to be in place. These include:

- Respect for members of the public. This will be shown in the quality of the welcome, hospitality, and a host of other small but significant ways.
- A focus on building a supportive working relationship with each person. Our consistent experience is that effective engagement requires a real relationship between each member of the public and a named staff member in the organisation.
- While people may start a training programme without such a relationship in place, if it does not form during or shortly after the training, then there will be little lasting benefit. In addition to the working relationship with a staff member, effective peer support within the group of learners adds real value.
- In addition to receiving training, members of the public who are involved in participation activities need to be able to bring emerging issues to a learning set where they can receive additional advice and information, seek solutions, and receive support.
- Success is enhanced when there is real clarity about details – who is eligible to receive training, what will be covered and how, the core values and intended outcomes, future involvement opportunities and what support will be offered. In addition, flexibility and resilience is necessary to deal with the unexpected and harness previously unrecognised talents.
- Continuous structured learning experiences, with opportunities for tailoring to needs and interests will be more effective than a standalone intensive induction experience that is not followed up with further opportunities for ongoing development.
- The organisation needs to monitor the impact of the training it delivers and act in response to feedback to continuously improve.
- Adequate resources and support from all parts of the organisation will enable the elements listed above to be delivered.

What are the goals of training?

The purpose and learning outcomes of the training need to be clearly defined. It is important to support the learner in their role in bringing an external perspective to the NHS or academic organisation, so the training must avoid socialising the learner into the culture of the NHS or academic environment. This is particularly challenging when the public contributor has extensive prior knowledge of the health service or health research environment.

Sometimes training is used to recruit newcomers into involvement activities, while at other times it is used to train people who are already heavily involved. The Institute of Health and Wellbeing (see the Appendix) has deliberately taken their training course to marginalised groups to build a more diverse group of public contributors. Specific audiences may need both content and delivery to be adapted.

In our experience only a few learners want a recognised accreditation that follows assessment or examination, while more people prefer a certificate of attendance and a less formal approach.

When a learner has completed the training, there should be a range of participation opportunities for them to get involved. Training that leads nowhere simply increases frustration, while harnessing the training through new levels of contribution will increase value and build self-esteem. Services that arrange training should offer opportunities for learners to get involved in their own organisation and be able to signpost people to opportunities elsewhere⁸.

Design the content or syllabus

The following topics might form a syllabus, either for a core induction programme or tailored additional learning to support contribution in specialised roles:

- Policy and evidence context – the importance of involvement, empowerment, and co-production. Evidence of impact on services and benefits of participation for the public.
- Continuous personal development – code of conduct, reflective practice, gaining skills and confidence, mentoring, coaching, knowing yourself.
- Interpersonal skills - sharing your story, curiosity, listening skills, confidentiality and disclosure, challenging others, the power of language.
- Services and tasks – understanding the NHS context, its jargon, the role of relevant organisation, service, or programme. Understanding the activity that is being carried out.
- Influencing organisations – scrutiny as a critical friend, accountability, teamwork, and committee skills, working through partnerships and networks and understanding how organisations learn.
- Training the trainer and facilitator – presentation skills, use of PowerPoint, online platforms and participative exercises that enable all voices to be heard, responding to different learning styles and varying levels of ability, avoiding jargon.

- Ready for the unexpected – risks and what might go wrong and what to do about it.
- Finding out more – locating further reading and other sources of expertise.

In addition, guidance on specific training is available to equip people for taking up roles, such as membership of a general research group⁹, project advisory group¹⁰, project steering group¹¹, funding application reviewer¹², public researcher¹³, and NHS Non-Executive director¹⁴.

A regional strategy

We considered the merits of a regional approach to training the public for involvement. Such a training programme might begin with an introductory module to cover some common ground, augmented with optional modules which would add a range of specialist topics for people interested in specific issues. For example, we might imagine modules on:

- Education - especially relevant to Health Education East Midlands
- Research – especially relevant to the Clinical Research Network, ARC, research leads in NHS trusts and user-led research organisations
- Leadership – relevant to the Leadership Academy and transformation teams
- Clinical care – the Strategic Clinical Network, Clinical Senate, NHS England and Improvement, all provider services, Healthwatch and advocacy organisations
- Commissioning – Clinical Commissioning Groups, Commissioning Support Units, and Integrated Care Systems.

Few staff working in involvement have extensive experience as trainers, and so we thought it might be helpful to have a centralised resource – one or more people who have real expertise in patient and public involvement combined with teaching skills. Local involvement lead staff could co-lead training events with the regional expert, thereby developing their own skills, blending their effective relationships with learners with the subject knowledge of the professional trainer. Centralising expertise has potential to reduce decay in the quality of training.

Sharebank in the East Midlands is a centralise resource, bringing together expertise, resources, and training to support the development of patient and public involvement in health and social care research.

<https://arc-em.nihr.ac.uk/about/public-involvement/sharebank>



References

- ¹ For an example, see: <http://www.invo.org.uk/working-together-to-develop-public-involvement-training/>
- ² For example, see: <http://www.invo.org.uk/wp-content/uploads/2012/11/INVOLVETTrainingSupport2012.pdf> Also <http://www.invo.org.uk/wp-content/uploads/2011/11/TrainingSupportWEB140610.pdf>
- ³ <http://www.invo.org.uk/resource-centre/library-resource/?id=553§ion=invo-net>
- ⁴ <https://onlinelibrary.wiley.com/doi/full/10.1111/bld.12331> and <https://evidence.nihr.ac.uk/alert/with-the-right-training-people-with-learning-disabilities-can-become-partners-in-research/>
- ⁵ <http://www.invo.org.uk/resource-centre/library-resource/?id=318§ion=invo-net>
- ⁶ <http://www.invo.org.uk/resource-centre/library-resource/?id=556§ion=invo-net>
- ⁷ http://www.invo.org.uk/wp-content/uploads/documents/MHRN_CaseStudiesAugust_2013.pdf
- ⁸ A key resource for finding out about opportunities for involvement across the East Midlands is *Public Face*. Please register for the *Public Face* bulletin [here](#).
- ⁹ <http://www.invo.org.uk/posttypesource/training-and-support-for-research-panel-member/>
- ¹⁰ <http://www.invo.org.uk/posttypesource/training-and-support-for-project-advisory-group-member/>
- ¹¹ <http://www.invo.org.uk/posttypesource/training-and-support-for-project-steering-group-member-2/>
- ¹² <http://www.invo.org.uk/posttypesource/training-and-support-for-public-reviewer/>
- ¹³ <http://www.invo.org.uk/posttypesource/training-and-support-for-peer-interviewers/>
- ¹⁴ <https://www.gov.uk/government/publications/nhs-trust-and-foundation-trust-non-executive-directors-programme>