Public and Patient Involvement (PPI) in evaluation is where work “is carried out actively ‘with’ or ‘by’ people – rather than ‘to’, ‘about’ or ‘for’ them” http://www.invo.org.uk

Guidelines for Patient and Public Involvement in Evaluation:

Building and Sustaining a Culture of Involvement

Meaningful: Demonstrate commitment to a culture of involvement

Collaborative: Define and agree involvement

Supportive: Provide appropriate support

Accessible: Identify and address accessibility needs

Developmental: Provide training and development opportunities

Effective: Enable effective communication

Reflective: Share your experiences and learning from involvement

Ethical: Uphold the ethics of involvement

For more information or support visit: http://www.nhsevaluationtoolkit.net/contact-us/

Or for more information about Patient and Public Involvement please visit: http://www.phwe.org.uk and http://www.invo.org.uk


This leaflet has been produced by the West of England Evaluation Strategy Group (hosted by NIHR CLAHRC West) to support the spread of and best practice in evaluation across the region. With thanks to the UK Evaluation Society for financial assistance and to the South West Evaluator Forum members and public contributors in developing the guidelines. (May 2017)

For our complementary leaflet and resources on ‘Best Practice in the Ethics and Governance of Service Evaluation’, go to: http://clahrc-west.nihr.ac.uk/evaluation/

This leaflet is available electronically and in printable format on the CLAHRC West website: search for Evaluation Guidelines or visit http://clahrc-west.nihr.ac.uk/evaluation/
## Introduction
These guidelines have been co-produced by patients, service users, public contributors, staff from voluntary, academic and statutory sectors and people working in evaluation and patient and public involvement. They have been developed to support anyone working in evaluation to embed patient and public involvement into their evaluation activities and to ensure that public contributors feel part of the team.

### Demonstrate commitment to a culture of involvement
- Involve patients and the public from the very start of the evaluation project
- Create real opportunities for people to be involved and have influence at all stages from development to dissemination
- Understand and respect people’s reasons and motivation for becoming involved
- Promote and enable the voice of patients and the public at all stages of the evaluation
- Promote involvement of patients and the public – from collaboration (as a minimum standard) through to co-production and co-creation
- Acknowledge the contribution of patient and public representatives in any presentations or publication

### Support public involvement in evaluation
- Identify the barriers and facilitators to involvement at an individual and project level
- Build enough time into a project for meaningful patient and public involvement
- Allocate time, funds and resources for involvement in the evaluation plan
- Share the lessons learned around practicalities and process of involving public and patients in evaluation – what worked well and what can be improved
- Share evidence of the impact of patient and public involvement in evaluation

### Define and agree involvement
- Be clear about the differences between participation, collaboration, co-production and involvement and which one of these is most appropriate for your project
- Produce job roles and define responsibilities collaboratively with patient and public group members, allowing for flexibility in these roles and responsibilities where appropriate
- Produce Terms of Reference collaboratively with patient and public group members

### Provide appropriate support
- Explore with patient and public group members what non-financial support is needed and available
- Be clear about the financial support available (refer to the organisation’s involvement payment policy)
- Identify a named person at the centre of the project who will be available to support patient and public group members
- Provide professional support to those involved including supervision and mentoring where necessary
- Consider appointing two or more patients or members of the public to enable peer support
- Adjust the pace and way of conducting the project when necessary

### Provide training and enable personal development
- Identify and address any training and development needs for people to be involved in the evaluation
- Provide training and development opportunities
- Support people to attend events relevant to their involvement in evaluation projects

### Enable effective communication
- Ensure clear communication between everyone involved in the project
- Use accessible language for all communications
- Avoid the use of, or explain jargon and acronyms
- Adjust communication methods to suit people’s available resources and preferences
- Provide regular feedback
- Provide information about the progress of the evaluation and lessons learned to all who take part

### Identify and address accessibility needs
- Address people’s accessibility needs
- Ensure that all evaluation team members have access to the resources they need
- Understand, accommodate and celebrate diversity

### Uphold the ethics of involvement
- Ensure processes are in place to protect all involved in the evaluation
- Ensure organisational policies and procedures on data protection and information governance are respected
- Be transparent
- Manage expectations around change as a result of the evaluation, and the impact that might have on those involved