Faculty of Health and Social Care
Service User and Carer Forum

Patient and Public Involvement (PPI) Strategy
for Education and Research
2011-2016

<table>
<thead>
<tr>
<th>Version &amp; date</th>
<th>Version 2. 04/10/2013</th>
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</table>
| Authors        | Mairi Byrne (Education)  
                 | Kate Knighting (Research) |
| Approved       |                      |
| Review Date    | Annually  
                 | Next review: September 2014 |
Current Context
The movement to engage service users and their carers in the development of health and social care services has progressively evolved throughout the last decade. The recognition of the role of the service user as the ‘expert’ in their own care delivery is increasingly prominent and health and social care policy has significantly influenced the need for providers to demonstrate the degree to which service users and carers have been engaged. As providers of health and social care education are similarly governed, best practice would indicate the need to adopt an equivalent approach. The Department of Health, research funding bodies and charities all emphasise the importance of involving patients and the public in research. Patient and public involvement (PPI) in the development of research bids and during projects has now become an essential criteria used to assess bids by many of the major funders.

Within the Faculty of Health and Social Care until now there has been an ad hoc approach to the engagement of service users and carers within recruitment, the design, development and delivery of health and social care programmes, and research projects. In pre-registration nurse programmes for example, individual academic staff have largely been instrumental in the development of strategies to include service users and carers in a range of activity that supports the student learning experience. Equally, the Social Work academic team has developed clear guidelines for service user and carer engagement adopting a strong partnership approach. Researchers have engaged with patients and carers on projects across a range of activities such as developing funding bids, advising on project designs and participant materials such as patient information sheets.

Anecdotal feedback from services users and carers already engaged in education and research activity in the Faculty is positive, indicating that successful involvement is determined by the value of the partnership, the service user and carer voice being heard, and having the opportunity to engage with
Diagram One

It is evident that there is not only a need to capture and disseminate the good practices already adopted across the Faculty, but there is also a need to evaluate the impact of service user and carer engagement on the student experience. This strategy therefore provides a framework for the maintenance of current practices and the development and implementation of new activity that will strengthen service user and carer ‘voice’ across the wider portfolio of the Faculty. In addition to this it will facilitate opportunities for dissemination of good practice across the wider University. As service user and carer engagement is also high on both the government and professional statutory and regulatory bodies’ agenda, it is critical that the Faculty is cognizant of wider local and national developments as they arise. The strategy will therefore facilitate the opportunity for both consolidation and growth.
Aims and Objectives

The overall aims of this strategy are to delineate the systems and processes in place to provide both the opportunities and support for service users and carers to:

1) appropriately engage with students as they progress through their programme (education), and
2) to engage with research activity within the Faculty across different levels from individual projects to strategic planning and development (research)

In order to achieve these aims there is a need to establish a collaborative forum that feeds into existing Faculty deliberative structures and which has responsibility for the following objectives:

- Identify the parameters of service user and carer engagement across all education programmes in the Faculty
- Provide personal and educational development that appropriately prepares and safeguards service users and carers during their engagement within the context of higher education.
- Establish and maintain a database of service user and carers and their respective interests
- Establish a Faculty approach to the remuneration of service users and carers
- Establish an online forum for communication to the wider service user and carer community
- Identify and act on opportunities to develop collaborative partnerships across the University and the wider local and national community.
- Identify opportunities for service users and carers to engage with Faculty research and enterprise activity.
- Implement strategies to evaluate the impact of service user and carer engagement on the overall student experience.
**Action Plan**
The strategy action plan in Appendix 1 sets out the timescale for implementation and short and long term goals.

**Reimbursement Policy**
The ‘Protocol for reimbursement for service users and carers’ in Appendix 2 outlines the Faculty guidance for making reimbursements for attendance and travel to service users and carers.

**Contacts**
Any questions relating to the strategy or PPI activities for education or research within the Faculty can be directed to:
- Mairi Byrne – Forum Facilitator/Education (Byrnem@edgehill.ac.uk)
- Kate Knighting – Research (Knightk@edgehill.ac.uk)
- Peter Weatherill – Forum administrator (weather@edgehill.ac.uk)
## Appendix 1. Faculty of Health and Social Care Service User and Carer Forum - PPI Strategy 2011-16: Action Plan
(Updated August 2013)

<table>
<thead>
<tr>
<th>Issue</th>
<th>Likely impact if not managed</th>
<th>Actions to be taken</th>
<th>Responsibility for action</th>
<th>Timescale for action</th>
<th>Action taken to date (Review due Sept 2014)</th>
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<tbody>
<tr>
<td>Ad hoc development of service user and carer engagement across the Faculty</td>
<td>There is no means of tracking service users and carers engaging with students in the Faculty</td>
<td>Data base established within forum membership but recognise needs to encompass wider participants and to include all willing. 1. Use meetings to flag up relevant Faculty events</td>
<td>Forum Facilitator</td>
<td>January 2014</td>
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<td>There is currently no system in place to gather intelligence and act upon opportunities for partnership working beyond the Faculty</td>
<td>No means of communication to the wider service user and carer community</td>
<td>2. Service user and Carer forum to develop an online/ face to face communication strategy with the wider community</td>
<td>Forum Facilitator</td>
<td>January 2014</td>
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<td>There is only anecdotal evidence to suggest that Service user and carer engagement impacts on the student experience</td>
<td>Strategies and processes established that are ineffectual</td>
<td>3. Develop a tool to evaluate the impact of service user and carer engagement</td>
<td>Forum Facilitator</td>
<td>January 2014</td>
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<td><strong>RESEARCH</strong></td>
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<td>Forum Facilitator</td>
<td>January 2014</td>
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<td>PPI is essential in research and needs to be embedded within the Faculty research activity</td>
<td>Lack of PPI can result in rejected research bids and lead to studies which are less likely to recruit, poorly designed and less relevant to service</td>
<td>4. PPI will be a required component for all major research bids prepared in the Faculty</td>
<td>Research Lead for PPI, Director of the EPRC and Carer Forum</td>
<td>April 2014</td>
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<td>PPI in research can be a negative experience for service users and carers if there are unrealistic expectations of their input or inadequate support provided.</td>
<td>Negative experiences will lead to withdrawal of service users and carers from research activity in the Faculty.</td>
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<td>6. Principal Investigators (PI) for projects involving PPI will be responsible for ensuring that all appropriate training and support is provided to any service users and carers who become involved with research project, with support from the PPI leads and Carer Forum.</td>
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<td>7. PI’s will also be responsible for ensuring that the remuneration policy is followed for all PPI activity.</td>
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<td>Principal Investigators, Leads for PPI and Carer Forum</td>
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<td>April 2014</td>
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| PPI in research can be a negative experience for researchers without proper guidance and support for novices. | Negative experiences will lead to researchers not wishing to use PPI for research. |
| 8. Training and support for PPI in research will be developed and delivered in the Faculty |
| Leads for PPI, Director of the EPRC and Carer Forum |
| Jan 2014 |

*References and resources relating to PPI in research can be found in Appendix 3.*
Appendix 2. Protocol for reimbursement for service users and carers

Protocol for reimbursement for service users and carers

1 Introduction

1.1 This protocol aims to recognise the contribution that service users and carers make to the work of Edge Hill University, Faculty of Health and Social Care by offering reimbursement to individuals concerned.

1.2 The aim of this protocol is to establish a real working relationship between staff in the faculty and service users and carers.

1.3 Reimbursement to service users or carers is not in any way intended to compromise their independence.

2 Reimbursement for Attendance

2.1 Reimbursement will be offered to individual service users and carers involved in the following work: (This is not an exhaustive list)
   - Staff and Student Appointment panels.
   - Module / Programme planning.
   - Student assessment.
   - Direct work with students.
   - Attendance at relevant meetings and forums.
   (NB attendance at meetings should not exceed 2 hours)

All activities that attract reimbursement under this protocol will be identified in advance and agreed with the individuals concerned before the involvement takes place.

2.2 Reimbursement will be offered at the following rate from 1st January 2013 onwards

Per hour-£15.00 (£7.50 per half hour). The number of hours will not normally exceed 4 in one day. Beyond this figure a daily rate should be agreed in advance and will not exceed £90.

2.3 Service users and carers will be required to complete and submit a form to the relevant staff member to claim reimbursement. This should be done as soon as possible after the event.

2.4 A service user or carer may choose to receive the reimbursement in full, not receive a reimbursement, or make arrangements to make a donation to a charity of their choice.

3 Reimbursement for Expenses

3.1 In addition to any reimbursement for attendance claim, service users and carers will be entitled to be reimbursed for travel expenses. Service users and carers are expected to use their own or public transport wherever possible.
3.2 Mileage will be reimbursed at 40p per mile up to a distance of 20 miles each way. Any reimbursement for miles in excess of this need to be agreed prior to the event. Public transport costs will be reimbursed, however receipts/tickets must be obtained and submitted.

4 Impacts on Benefits, Income Tax and Liabilities

4.1 Service Users and Carers are advised to seek independent specialist information and advice regarding receipt of reimbursement from Edge Hill University.

4.2 It is the responsibility of the service user or carer to inform the Department of Work and Pension if any reimbursement received takes them above the income disregard for their individual circumstances.

4.3 Edge Hill University is required to give accurate details of any reimbursements made to an individual if asked to do so by the Department of Work and Pensions.

5 Training

5.1. Before becoming involved with Edge Hill University, service users and carers will be offered training and support to help them carry out the activities requested of them. In line with other organisations, training is carried out free of charge to the individual service user and carer. Reimbursement is not available for attending training sessions, however travel costs, if applicable are available to be claimed following training sessions. It is expected all service users and carers who are involved will have attended a training (or refresher) session.
Appendix 3. Useful references and resources for PPI in research

Organisations

INVOLVE was established in 1996 and is part of, and funded by, the National Institute for Health Research, to support active public involvement in NHS, public health and social care research. It is one of the few government funded programmes of its kind in the world. As a national advisory group their role is to bring together expertise, insight and experience in the field of public involvement in research, with the aim of advancing it as an essential part of the process by which research is identified, prioritised, designed, conducted and disseminated. www.invo.org.uk


References


