

Patient and Public Involvement and Engagement (PPIE) Strategy and Operational Plan 2019 – 2023

RDS Public Involvement Community (PI-C) aims to deliver the national Public Involvement strategy for the NIHR RDS and to ensure the 10 regional RDS provide a coordinated high quality Public Involvement service. For 2019-23, PI-C have agreed to continue the previous overarching 2016-18 Strategy. We will implement a detailed work plan to deliver this Strategy at a national level and the individual RDSs will describe their plans for implementation of their local priorities regional level.

The strategy and national operational plan has been developed and agreed with the national RDS Public Involvement Community. The local PPIE operational plan for the SW RDS will involve working across PPIE networks and with public contributors in the South West. The responsibility for delivering the plan will rest with the RDS SW Director but work streams will be led by the PPIE lead working closely with the PPIE team, other RDS Staff locally and nationally and our public contributors. Progress in the delivery of the plan will be reported to the RDS SW Senior management team every three months, to the Stakeholder's group annually and to CCF as part of the annual report.

This plan comprises the objectives, milestones and outcomes to deliver the National RDS PPIE Strategy and the local SW RDS plan which has been developed taking account of our commitment to supporting the delivery of the national strategy, the National Public Involvement Standards and with consideration of what would develop and improve our PPIE contribution to research in the south west.

National RDS Public Involvement Strategy 2019-23

1. To promote effective ways of encouraging and supporting RDS clients to work with members of the public in research design choices so that public involvement is embedded throughout the project, e.g. Relevance of Public Involvement; Selection of suitable outcome measures; Feasibility; Development of study materials; Dissemination of results
2. To support an increasingly diverse and empowered Public Involvement community and provide them with appropriate support (eg. training) and encouragement to participate as valued partners in RDS infrastructure and supporting RDS clients. RDS clients will also be encouraged to engage with a diverse community on their projects.
3. To continually review existing Public Involvement structures and networks in place regionally to increase the opportunities for patients and the public to support the aims of the RDS in promoting high quality and relevant applied health research. This may include coordinating mechanisms to provide public feedback on research proposals, outreach events to engage the public etc.
4. To work with NIHR partners and members of the public to inform, promote and encourage use of the UK Public Involvement Standards.
5. To ensure that through its partnership with INVOLVE, the RDS will act as a communication link. INVOLVE will work alongside the RDS to establish links with national and regional fora to ensure that national Public Involvement work is widely disseminated and that regional activity is routinely reported to INVOLVE (subject to review with respect to the new NIHR centre for patient and public involvement, engagement & participation and research dissemination after April 2020)

6. To provide leadership or support to promote local Public Involvement partnerships, eg. through establishing and/or taking part in promoting and supporting regional Public Involvement communities to develop Public Involvement locally in a way that is aligned with NIHR's goals.
7. To provide support and development to RDS Public Involvement staff to ensure they can work effectively to promote strong public involvement in research applications.
8. To continue to demonstrate impact of Public Involvement in the work of the RDS by using the UK National Public Involvement Standards as a framework for consistently reporting RDS activity.

NIHR Public Involvement standards

Standard 1 – INCLUSIVE OPPORTUNITIES

We offer public involvement opportunities that are accessible and that reach people and groups according to research needs.

Standard 2: WORKING TOGETHER

We work together in a way that values all contributions, and that builds and sustains mutually respectful and productive relationships.

Standard 3: SUPPORT & LEARNING

We offer and promote support and learning that builds confidence and skills for public involvement in research.

Standard 4: COMMUNICATIONS

We use plain language for timely, two way and targeted communications, as part of involvement plans and activities.

Standard 5: IMPACT

To drive improvement, we capture and share the difference that public involvement makes to research.

Standard 6: GOVERNANCE

We involve the public in our governance and leadership so that our decisions promote and protect the public interest.

Objective 1: To support high quality research proposals which are relevant to the public, by providing high quality, evidence-based guidance and support to all RDS clients about public involvement in research design

Justification: Good, effective public involvement and engagement needs to start as early in the research cycle as possible. The RDS will continue to provide expert public involvement guidance and support to RDS clients by drawing upon the latest evidence-base and through our collaborations with the NIHR.

National Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
We will develop and promote the new RDS Handbook which details the specific role of public involvement in research design	All regions will have the up to date RDS public involvement and engagement guidance on their website (Years 1-5) All RDS advisers will refer to the new guidance as part of advising and supporting clients (Years 1-5)	Number of downloads of the new RDS guidance from regional websites (Reach) Number of projects supported by Public Involvement (Reach)	Continuous improvement (4)
We will develop a 'checklist' of basic Public Involvement and engagement advice for use by all RDS Advisers, when providing initial support to clients	Distribution of 'PPIE checklist' to all RDS Advisers (Year 2) RDS Staff survey about their confidence in dealing with enquiries about Public Involvement (Year 3)	Increased confidence of RDS Advisers to provide public involvement and engagement advice (Refinement)	Continuous improvement (4)
We will lead or contribute to development and learning workshops for RDS clients on specific aspect of public involvement in research design (e.g. public co-applicants, co-production, community engagement, methodological studies). Delivered at a national, cross-regional, or regional basis	PIC to agree on workshops to deliver and form of evaluation (Year 1) Regions will deliver at least 2 learning workshops for RDS clients (Years 2-5)	Number of public involvement and engagement workshops delivered by regions (Reach) Evaluation of workshop feedback (Refinement)	Continuous improvement (4)

Objective 1: Local Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
<p>We will focus on requirements of funders around what is expected by them in terms of PPIE by supporting the implementation of a PPIE checklist linked to the standard application form.</p> <p>Produce a “rough guide” – to what PPIE is and what it isn't to support researchers, staff and public contributors to avoid confusion with qualitative research.</p>	<p>PPIE Checklist implemented in SW RDS to support staff interactions with researchers and public contributors (Year 2/3).</p> <p>Checklist will be made available via the SW RDS website</p> <p>“Rough Guide” uploaded to SW website (Year 2)</p>	<p>Improved quality of narrative around PPIE in grant applications assessed by feedback on applications from local and panel reviews. (Refinement)</p> <p>Numbers of views/downloads of the checklist / “rough guide” (Reach)</p>	<p>Connectivity (7d)</p> <p>Continuous improvement (4)</p>
<p>Develop an acceptable way to provide feedback to our public contributors who are part of our project review committee.</p> <p>Develop a way of seeking feedback from Children and young people when projects we review are about them.</p>	<p>Year 2</p> <p>Year 2/3</p>	<p>The members of the public who work with us will receive feedback from the RDS so that they can see the value of their contributions to the research projects and teams we support. (Refinement)</p> <p>Where needs are identified we will develop training plans to support their contributions. (Refinement)</p> <p>We will have children and young people who can provide researchers with feedback on their project proposals. (Reach, Relevance, Refinement, Relationships)</p>	<p>Continuous improvement (4)</p>

Objective 2: To promote the use of National Standards for Public Involvement to improve quality

Justification: The National Standards for Public Involvement will be considered the marker for high quality public involvement. As leaders in the public involvement arena, the RDS needs to demonstrate that it supports, promotes and delivers the high-quality public involvement in all its activities

National Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
We will support RDS clients to use the National Standards in planning and delivering their PPIE activities	All RDS clients to be signposted to the National Standards (Y1)	Case examples of how RDS clients have used the National Standards in the planning (grant applications and/or Public Involvement Funds (PIF) applications) and delivery (PIF evaluation) of Public Involvement in research design (Reach, Relevance, Refinement, Relationships)	Continuous improvement (5)
We will explore how we can embed the National Standards for public involvement within the Public Involvement Fund application forms and be used as a framework for the review of PIF applications	<p>Completion of National review and mapping of current PIF review principles & process (Year 1)</p> <p>Recommendations for the use of quality indicators specific for use with the PIF application and review process (Year 2)</p> <p>Development of nationally consistent PIF review and evaluation templates, adaptable to regional needs (Year 3)</p>	Case studies of how RDS staff have used the National Standards in the review of PIF applications (Refinement)	Continuous improvement (5)
Using the National Standards, we will explore existing Codes of Practice for public involvement (or adopt existing) within the NIHR for adoption in RDS operations and governance	<p>Explore existing Code of Practice for involving public members of the PIC (Year 1)</p> <p>New Code of Practice distributed all RDS regions (Year 2) and shared with NIHR</p> <p>Review of public involvement in RDS activities incorporated in Annual Reports (Years 3-5)</p>	<p>Positive feedback from RDS public contributors (Refinement, Relationships)</p> <p>Evidence of the use of the National Standards in RDS activity in Annual Reports (Refinement, Relationships)</p>	Continuous improvement (4)

Objective 2: Local Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
<p>Using information from previous annual report and other data we hold; we will compose a baseline assessment of our position with regards to the National PPI standards in all aspects of our PPIE.</p> <p>From the audit we will update our PPIE Operational plan and revise our priorities.</p> <p>We will conduct an annual review of PPIE using the National PPI standards.</p>	<p>Year 2</p> <p>Year 3 onwards</p> <p>Year 3 onwards</p>	<p>Evidence of the use of the National PPI Standards in RDS activity and as a measure of progress and as a mechanism to determine priorities using information gained from audit data. (Reach, Relevance, Refinement, Relationships)</p>	<p>Culture (2)</p>
<p>To recruit two Public Contributors to the RDS SW Senior Management Team. This will provide a new perspective to our work and help us to promote good PPIE practice in all our activities.</p> <p>Review the role of Public Contributors and their contribution to the Senior Management team</p>	<p>Year 1</p> <p>Year 2</p>	<p>Public Contributors will be recruited by Autumn 2019. (Reach, Relevance, Refinement, Relationships)</p> <p>Role and contribution to be appraised by Summer 2020. (Reach, Relevance, Refinement, Relationships)</p>	<p>Coordination (8)</p>
<p>Provide funds to support early PPIE in grant applications</p>	<p>Years 1 onwards (on-going)</p>	<p>Number of requests for funding. (Reach, Relevance, Refinement, Relationships)</p> <p>Outputs from funded PPIE. (Reach, Relevance, Refinement, Relationships)</p>	<p>Continuous improvement (5)</p>

Objective 3: To improve the promotion and communication of RDS activities with the NIHR and our partners

Justification: Awareness of RDS expertise in the role of public involvement in research design with our partners is currently lacking and needs improving. Improving the communication and visibility of the RDS will help build links and support future collaborations

National Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
<p>Regular communication of PI-C and regional PI activity, using face-to-face engagement, digital and social media, in line with national RDS Communications strategy</p>	<p>All regions will contribute to PPIE section in 'RDS newsletter' to include at least 1 PI-C and 1 example of regional activity (case examples) (Y1-Y5).</p> <p>Contributions to include views/update from regional partners and groups regarding local priorities or initiatives</p> <p>All regions will routinely use of an agreed hashtag for RDS PI social media posts (Y1-Y5)</p>	<p>Website and social media analytics/newsletter subscription list (Reach)</p> <p>Logging PI events attended by RDS PI staff</p> <p>Case studies demonstrate how the RDS has supported clients to make a difference through public involvement (Refinement)</p>	<p>Communication and Information (1)</p>
<p>Map existing RDS activity and develop new links with national and regional partners for future communications and collaborations</p>	<p>PI-C members will develop a national mapping exercise, to understand existing national and regional networks / collaborations. This is likely to take the form of an online survey or face-to-face workshop (Year 1).</p> <p>Using findings from the mapping exercise, regions will review their current approach to collaboration, in order to forge new networks and initiatives and / or strengthen existing ones. (Year 2)</p>	<p>Survey results to demonstrate RDS PPIE links and activity with partners (Relationships, Refinement)</p> <p>Number of new RDS-partners (Reach)</p> <p>Case studies of new PI initiatives, national and regional (Relationships, Refinement, Relevance)</p>	<p>Connectivity (7) Co-ordination (9) Community (10)</p>
<p>Establish a working group (including RDS communications) to agree and implement regionally consistent mechanisms for recording and reporting PPIE</p>	<p>Working group established and agree a consistent recording and reporting framework (Year 1)</p> <p>Development of resources to support consistent recording and reporting (Year 2)</p> <p>Implementation of reporting framework (Y3);</p> <p>Evaluation (Y4)</p>	<p>Improved recording and communication of RDS activities (Refinement)</p>	<p>Continuous improvement (5)</p>

Objective 3: Local Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
We will put in place a routine and regular review of RDS SW web-based PPIE materials and links to other resources	Year 1	Improved recording and communication of RDS activities assess against identified review / update deadlines (Refinement)	Communication and information (1)
We will work with other PPIE communities in the SW to develop a locally relevant sign-posting leaflet. The process will be made available to share with other PPIE communities across the region and nationally and via the website for anyone involved in PPIE.	Year 2 – 3	An increase in the number of RDS PPIE links with other communities and activity with partners (Relationships, Refinement)	Connectivity (7)
We will liaise with the chair of our local RfPB committee to ask that all feedback letters which suggest that the PPIE was not adequately addressed remind applicants that the RDS is available to advise and support PPIE activities.	Years 3 onwards.	Number of people with no previous contact with the RDS who come seeking help with their PPIE following a feedback letter from the RfPB committee. (Reach, Relationships)	Communication and information (1) Continuous improvement (5) Co-ordination (9)

Objective 4: To provide regional leadership around priorities for public involvement in research

Justification: The RDS could be viewed as the regional heartbeat of public involvement. This regional footprint provides a unique opportunity to build upon previous successful engagement with many regional networks to share best practice, expertise and resources. The RDS will continue and broaden this engagement by providing regional leadership to promote research that addresses national priorities across health, public health and social care.

National Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
Continue leadership of / participation in existing regional networks and support the development of new regional networks (or equivalent), if absent	All RDS regions will participate in regional networks (or equivalent) (Year 4)	An increase in RDS presence in regional networks throughout the country (Reach, Relationships)	Connectivity (7)
We will work in partnership with INVOLVE, to share knowledge and resources (e.g. best practice, expertise, patient priorities for research, new guidance) with regional networks, as part of a bi-directional flow of information between national and regional fora.	All RDS will provide a regular update to regional networks on its activities, RDS resources, and national issues and priorities. (Year 1 onwards) PI Leads will provide a regular update on regional network priorities and activities to the PI-C for further dissemination throughout the NIHR (Year 1 onwards)	Increased awareness of national priorities and initiatives for PI by regional partners, demonstrated through meeting minutes and/or testimony (Refinement) Increased awareness of regional priorities and initiatives for PI by PI-C and NIHR, demonstrated through meeting minutes and/or testimony (Refinement)	Connectivity (7)
We will forge collaborations and provide leadership of regional initiatives to address national and /or local priorities for PPIE	All regions will contribute to at least one nationally led PPIE initiative per contract (Year 2)	Case studies of regional network activities, including the RDS contribution (Refinement, Relevance, Relationships)	Co-ordination (9) Community (10)

Objective 4: Local Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
We will explore the concept of “Share banking” to utilise skills available across the south west.	We will work with PPIE staff in other NIHR and other research related organisations in the SW to develop a shared approach to skills utilisation. (Year 2/3)	Demonstrate an increase in RDS PPIE links and activity with partners. (Reach, Relevance, Refinement, Relationships)	Coordination (9) Community (10)
We will develop a sign-posting leaflet with other PPIE communities in the SW. We will share the information across the region and the process nationally for potential public contributors and researchers to direct them to organisations and groups who can support PPIE activities	Completion of the leaflet and publication on the website by mid-year 2	Demonstrate an increase RDS PPIE links and activity with partners (Reach, Relevance, Refinement, Relationships)	Coordination (9) Community (10)
We will maintain our established relationship with the regional links from INVOLVE	We will keep open our communications with the emerging INVOLVE team and establish regular contact with our new regional links as soon as they are known (Year 2)	Named regional link with INVOLVE (Relationships, Refinement)	Community (10)

Objective 5: To promote and provide advice on co-production and community engagement within health, public health and social care research

Justification: New INVOLVE guidance on co-production has been published and there is a growing emphasis on community engagement to shape, discuss and share research ideas and findings, and to facilitate future involvement. Both areas lack awareness and understanding in their value to research by many researchers. Community engagement also can provide the vehicle towards improving diversity and authenticity in public involvement. The RDS has a role to facilitate and support researchers who wish to undertake these activities to develop research proposals.

National Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
We will identify existing expertise for co-production and community engagement within the RDS (and externally)	Mapping exercise for expertise in co-production and community engagement (Year 2)	RDS staff are more confident where to seek additional advice if needed (Refinement)	Continuous improvement (5)
We will develop a nationally agreed statement, and links to existing expertise and guidance, on the role of community in research design and its differentiation from meaningful public involvement	Agree Statement and distribute to RDS staff (Year 2)	Case examples of guidance and advice provided to RDS clients to community engagement, including the outcomes of the activity (Refinement)	Continuous improvement (5)
We will develop resources which will help to embed learning from the Reaching Out projects within the RDS and research more broadly (for example a 'Top Tips' for community engagement)	Review findings from the Reaching Out evaluation to identify common principles (invite CE experts) (Year 2) Develop a Top Tips resource to be incorporating into the RDS Handbook (Year 3)	Case examples of guidance and advice provided to RDS clients to community engagement, including the outcomes of the activity (Refinement)	Continuous improvement (5)

Objective 5: Local Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
<p>We will develop the RDS SW PPIE workforce so that they can support researchers who wish to use co-production and community engagement techniques in their study planning.</p> <p>Extension of national plan to conduct a mapping exercise to include our local PPI E communities</p>	<p>Training needs assessment – Year 2</p> <p>Training plan – Years 2/3</p> <p>Conduct mapping exercise across SW Year 2</p>	<p>Access to appropriately trained staff who can support these activities (Relevance, Refinement)</p> <p>To identify staff who are trained in community engagement techniques and co-production (Relationships, Relevance)</p>	<p>Continuous improvement (4)</p>
<p>We will engage with locally available Global Health experts for advice on PPI / community engagement for Global Health Projects. Where locally based expertise is not available we will liaise with the RDS PI-C</p>	<p>Year 2 onwards</p>	<p>Directory of local PPIE expertise that can be contacted for advice for Global Health applications (relationships, Relevance, Refinement).</p> <p>Referrals to RDS PI-C for support (Reach, Relevance, Refinement, Relationships)</p>	<p>Continuous improvement (4)</p>

Objective 6: To support a vibrant and productive RDS Public Involvement Community to continue to share best practice and contribute to national conversations on public involvement with NIHR and other research organisations

Justification: Open sharing of best practice and learning from others is a hallmark of the NIHR and RDS Public Involvement Community. We will continue this vital practice to further improve the role and quality of our public involvement advice and activities

National Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
Convene RDS PI-C meetings, with public contributor, INVOLVE and CCF involvement to share best practice and innovations and respond collectively to national consultations/initiatives	7 meetings (4 face-to-face, 3 Hangouts) scheduled per year (Year 1-5) Recruit 3 public contributors (Year 1) Annual Review of PIC T&Cs (Years 1-5)	A vibrant and productive RDS PIC for sharing best practice (Relationships) Evidence of regular and active public contributor involvement in PI-C activities (Relationships) Evidence of PI-C collective contribution to national consultations/initiatives (Relationships, Reach)	Continuous improvement (4)
To produce a focussed update on regional and national public involvement activities to RDS staff	Most appropriate mechanism and timeline to be discussed with RDS Communications team	A more informed RDS Staff about developments in public involvement (Refinement)	Continuous improvement (4)
Establish a working group to identify and develop public involvement training opportunities for RDS staff, including PPIE Leads	Establish links with National learning and development group to review previous work on needs assessment related to PI (Year 1). List of training opportunities for RDS PI staff (including linking to INVOLVE's L&D resource (Year 2)) Regions will collaborate to deliver a training session at the annual RDS National Event, or equivalent. (or webinar)	Up skilled RDS staff in public involvement and engagement (Refinement)	Continuous improvement (4)

Objective 6: Local Activities	Milestone & timeline	Measure of success (link to 4R's)	Link to GtEM
The RDS SW PPI team will provide the support necessary to deliver the national PPI strategy	Years 1 onwards	Demonstrated commitment to national working, attendance and contribution to PI-C meetings, taking the lead in a regional network event. (Relationships, Refinement)	Coordination (8)