# Checklist of materials for running a public involvement activity (updated November 2020)

***Please note*** *this is not an exhaustive list and is dependent on the activity you are running (e.g. focus group, Panel meeting).*

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| **Material** | **Hints and tips** | **Arranged? (✓)** |
| **For online public involvement events** | **Please** [**see here**](https://www.spcr.nihr.ac.uk/PPI/resources-for-researchers/faq/how-do-i-hold-ppi-meetings-using-virtual-tools) **for guidance on undertaking online public involvement events** |  |
| 1. ***Name tags (sticky labels)***
 | *Having the names already written (or printed) on labels will save time. Write first names only and avoid any titles to avoid any perceived or felt power imbalances.* |  |
| 1. ***Registration list***
 | *Make sure these are kept securely (e.g. sealed envelope or saved in a password protected file), only accessible to team running the activity and do not contain any confidential information (name and signature is enough).* |  |
| 1. ***Refreshments*** *– sandwiches, tea, coffee, water, glasses*
 | *Make sure you have collected any allergies/dietary requirements from members of the public beforehand. If the activity is running for several hours or over lunchtime, ensure that lunch is provided.* |  |
| 1. ***Slides and any other printouts*** *(e.g. agenda, Plain English glossaries, guide notes for presenter/organiser)*
 | *Ensure these are in an accessible format for all attendees (e.g. disabilities, impairments or sensory losses).* * *See “easy on the I” for producing accessible information for people living with learning disabilities:* [*http://www.easyonthei.nhs.uk/easy-on-the-i-home*](http://www.easyonthei.nhs.uk/easy-on-the-i-home)
* *See Macular Society for information on preparing documents for visually impaired people:* [*https://www.macularsociety.org/preparing-documents-visually-impaired-people*](https://www.macularsociety.org/preparing-documents-visually-impaired-people)

*You could also provide attendees with plain English glossaries to explain research terminology.** *See Imperial College Healthcare NHS Trust research glossary:* [*https://www.imperial.ac.uk/joint-research-compliance-office/resources/glossary/*](https://www.imperial.ac.uk/joint-research-compliance-office/resources/glossary/)
* *See INVOLVE’s plain English ‘jargon buster’ of research terminology:* [*https://www.invo.org.uk/resource-centre/jargon-buster/*](https://www.invo.org.uk/resource-centre/jargon-buster/)

*Governance Documents**Consider providing print outs of a draft role description and terms of reference if the group will be meeting more than once. These should be co-produced with the group using a first draft created by you.**We recommend using a Ground Rules document as a minimum for all events.**You can find templates for these documents on our Public Involvement Resource Hub, under the heading* ***“Public involvement planning and project documents for researchers”*** *and* ***“Public involvement public partner documents”****:* [*https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/*](https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/) |  |
| 1. ***Stationery*** *– markers, flipchart paper, post-it notes, stickers and notepads*
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| 1. ***Feedback forms (for attendees)***
 | *This allows you to collect general Feedback from attendees and highlight any issues that arose.* *Templates can be found our Public Involvement Resource Hub under the heading* ***“Evaluation forms”****:* [*https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/*](https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/) |  |
| 1. ***Evaluation forms (self-reflection by you and members of the public)***
 | *These can be used by both researchers and members of the public pre- and post-involvement activity to reflect on whether involving patients and/or the public in your project made an impact on you/them or your work. It may not be appropriate to use the pre -involvement activity form for members of the public as they may not have any expectations (and to avoid form overload!). However, gathering the public’s views post-involvement activity is valuable and you may be able to combine these questions with the general Feedback form in order to reduce the number of forms you ask them to complete at the end of the event.**Templates can be found our Public Involvement Resource Hub under the heading* ***“Evaluation forms”****:* [*https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/*](https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/) |  |
| 1. ***Payment/expense claim forms***
 | *We recommend you use the national NIHR Centre for Engagement and Dissemination 2020 guidelines to cost how much you will reward people (depending on their level of involvement), what you will reimburse (e.g. travel, accommodation, childcare etc.) and when. Please note the £5 contribution for attending a virtual meeting. See here:* [*https://www.nihr.ac.uk/documents/centre-for-engagement-and-dissemination-recognition-payments-for-public-contributors/24979*](https://www.nihr.ac.uk/documents/centre-for-engagement-and-dissemination-recognition-payments-for-public-contributors/24979)*Non-payroll fees (NPF) and expense claim forms can be found on our Public Involvement Resource Hub under the heading* ***“Expense and finance forms”****:*[*https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/*](https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/)*Remind attendees to bring original copies of receipts to attach to their claim forms as well as their bank details.* |  |
| 1. ***Photo/video consent form and posters***
 | *We’d encourage you to take photos as this will help to promote your work afterwards, both online and in print. You should make any attendees aware in advance if you plan to take photos.* *At the event, you should display posters that you are taking photos/videoing is taking place. Further information on this, as well as Imperial College posters can be found here:* [*https://www.imperial.ac.uk/communications/photography/consent-and-permissions/*](https://www.imperial.ac.uk/communications/photography/consent-and-permissions/)*You should also remind people at the event. If they do not wish to have their photo taken make sure this is clear by adding a sticker to their name tag (e.g. yellow dot). You can use the consent form found on the Public Involvement Resource Hub under the heading* ***“Consent forms for public partners”*** *to capture this:* [*https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/*](https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/) |  |
| 1. ***PPI/E privacy notice***
 | *You should provide this whenever you retain members of the public’s personal information (i.e. name, email, phone numbers) in order to contact them in future as well as bank account details to pay them for their time. The PPIE privacy notice also provides for members of the public providing you with sensitive information as well (as some researchers need to understand this for recruitment purposes). Provide printed copies at your activity in order to explain how their information is retained in line with GDPR. The PPIE Privacy notice can be found on the Public Involvement Resource Hub under the heading* ***“Public involvement public partner documents”****:* [*https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/*](https://www.imperial.ac.uk/patient-experience-research-centre/ppi-resource-hub/) |  |
| 1. ***Risk Assessment***
 | *If you are working with children aged 16 years and under or vulnerable adults, ensure you have undertaken relevant* [*Safeguarding training*](https://rise.articulate.com/share/shVR8LNQOvvLO9s4p-Aod4OvbgwC7d8r#/) *and obtained a Disclosure and Barring Certificate if you need one –* [*see here*](https://www.imperial.ac.uk/human-resources/compliance-and-immigration/dbs/) *for more details.**You should also undertake a risk assessment for the activity – please see* [*here*](https://www.imperial.ac.uk/safety/forms/) *under “Events and Festivals”.* |  |