

Patient and Participation Group Toolkit

Step One: Setting up and maintaining your group

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Contents

	Page
1. Local promotion and engagement	5
2. Information and prompt sheet for recruiting new members	8
3. Template Terms of Reference	10
4. Ground rules	13
5. How to write good minutes	14
6. Equalities statement and guidelines	17
7. Community Works services	19

These information sheets are designed to be used by Patient Participation Groups (PPGs) being set up and maintained in the early stages of their development.

This toolkit will be added to and further developed as PPGs across Brighton and Hove evolve during 16/7. We will gather PPGs' experiences and reflect good practice in additional information sheets on how to develop your PPG as a thriving local community group. This will include details on raising funds for your Group and managing your money.

If your PPG would welcome guidance or support, or if you would like to request an information sheet in provided on a particular subject, please contact Jenny Moore, jenny@bhcommunityworks.org.uk 01273 234023

1. Local promotion and engagement for PPGs

1. Keep your message positive

'Help us build a fantastic centre', 'come and meet other patients and carers', 'get your voice heard and write into the newsletter/ attend a meeting' etc are better than negative messages like 'without you we will close down' or 'dissatisfied? Come and tell us why?'

2. Keep the message simple

On leaflets and posters keep it really simple: the main purpose of group, time / place and contact. Try to save detail for conversation. Use images to suggest things rather than lengthy paragraphs.

3. Spread the message far and wide

Use shops, newsletters, Argus community pages, websites, Facebook, radio, local events, other groups and meetings, services which reach large numbers in the community eg schools, churches, practice notice boards. Try to get a member of staff in the practice to be a PPG champion, who is happy to talk to interested people and take contact details.

4. What incentives/ barriers are there for people to get involved?

Do you offer a social element as well as a meeting (sharing ideas/experiences/a raffle?) Do you offer refreshments? Are your meetings friendly? Do people like/know the venue or time? Do you have a successful reputation for getting things done? What do people get out of attending – do they learn useful information, get to do an activity they like, get training or new skills, help improve their community, a service etc.

Try to attend other activities in the community/area to promote your group. Take leaflets with contact details. Offer to chat to people about your group outside of it, introduce them or arrange for someone else to meet and greet them if they attend. Ask what people think

of your group – have they heard of it? Are they interested? If not –that’s okay but do they mind telling you why?

5. Trust and endorsement

Get other local people and groups to say positive things about your group and use quotes and references. Maintain trust by keeping up the dialogue. Don’t only tell people who ‘attend’, tell everyone what happened at last meeting – notices/ posters/ community websites and pages, email groups and networks. Someone may follow your activity remotely for some time before deciding to actually attend.

Try to use same images and wording across social media and paper publicity and when visiting / attending other community activity – repetition and familiarity will help people build sense of trust.

6. Reach out don’t just invite in

Use local media, door knock or stand outside shopping areas, have a stall or information area at your surgery, or run one alongside clinics and other activity.

7. Participate in local events

Use social media networks to promote your PPG. Link into your local community websites or Facebook pages. Update regularly. People get many messages on this format and yours need to go on as often as possible.

8. It’s not always about numbers

Some hugely successful groups run on a small core, but engage higher numbers at events and activities. Not everyone wants to attend a planning meeting but many people will help at an event – don’t make one aspect reliant on the other. Volunteers may only need one briefing before and one debriefing at end of an event, for instance some people like to do something practical like make the tea, set up or clear up, rather than attend meetings, these are all valid forms of participation.

9. Get support

PPG members are volunteers and as such are entitled to support and can access a range of support services in Brighton & Hove. Your local Community Worker or Forum is the first point of contact for support. If you don't know how to find this contact or your PPG is in an area without a community development worker, please contact Community Works 01273 234023 or email jenny@bhcommunityworks.org.uk

Community works runs training for small community groups, networks and other support services and has access to lots of information that maybe helpful to PPGs. Community Works can also help you to know where else to get help and what other groups and organisations are able to support you. See www.bhcommunityworks.org.uk/ppg for more details.

2. PPG information and prompt sheet for recruiting new members

This list of basic information on the role and purpose of PPGs is designed to be used to discuss the PPG with potential members and encourage their interest.

Introduction

- Introduce yourself and your role
- Ask: can I talk to you for a couple of minutes about being a patient here?
- Start with an open question. This allows people to tell you something about themselves i.e. how long have you been a patient at this practice? Are you local to the practice/ know Brighton well?

Explaining the PPG

- All General Practices (doctors' surgeries) have or are developing a Patient Participation Group known as a PPG. It is part of their contract with NHS England to have a patient group.
- The group consists of patients that want to work together to support the practice to be the best that it can be, to serve the needs of its patients and to act as a collective voice.
- All group members are volunteers and the practice supports them with their role.
- Groups also support each other through a citywide network.
- The groups are helped so they can raise funds to run events, produce newsletters, use social media, and improve the patient experience.

Describing how patients can get involved

- The PPG at this practice meets every
- They are a friendly group and the meetings take place here at the surgery (or say and explain where they take place)
- Tell the patient you will be there, so they know someone

- Offer to meet the patient before the meeting starts if you are able or arrange to meet them 5 minutes before the meeting starts if appropriate
- Our next PPG meeting is on
- The meetings last about two hours and refreshments are available, you can be as involved as you want
- Would you like to come along?
- If yes, do you need any support to attend?
- Take their email address or phone number to contact them, assuring them it will only be used to contact about PPG meetings
- If they are unable to attend or do not want to be a PPG member, ask them how they would like the PPG to speak to them instead, to hear their opinions or tell them what the PPG is doing?
- Make sure that you tell them that PPGs do not hear about individual patient complaints and they do not have access to individual patient information or records.
- If they do want to make a complaint suggest they do so directly to the practice in writing or tell them about other complaint support services such as PALS (leaflets should be available in the surgery).

3. Template Terms of Reference for Patient Participation Groups

This template is a guideline (the blue areas are hints/tips)

1. Name

It is usual to use the name of your practice in your group name

2. Aim

This is why you exist as a group, here is an example

To strengthen the relationship *between xxxxx (GP surgery)* and its patients and to assist the practice in continuing to improve its provision of healthcare, whilst ensuring that patients are at the heart of decision making.

3. Objects

This states how you will achieve your aim/aims – here are some examples:

- To represent patient views and improve communication between patients and the practice.
- To act as a critical friend to the practice.
- To provide a link between the practice and the local community (you may want to name the community here if it is easily defined i.e. a village, a specific area).
- To develop projects with the agreement of the practice that support wellbeing, and health promotion.
- To inform patients, and carers of patients, of the meetings and activities of the PPG (you can list methods that you will use i.e. webpage on the practice website, through a quarterly newsletter, using a notice board in the waiting room)

- The PPG can raise funds for the sole purpose of furthering the objects and aims of the group, as defined by these terms of reference. The PPG will record all income and expenditure and operate within the law and with due care and diligence when managing funds and resources.

4. Reporting lines:

The PPG needs to discuss this section with their assigned support person from the practice staff. All of the group or its elected committee need to agree and fully understand this and their role in reporting.

- Representatives from this PPG will link with the Citywide PPG network and report back to other members of the group at subsequent meetings.
- We will produce a short annual report of our achievements
- Minutes will be made available through the practice website and copies emailed to interested parties.
- The PPG will assist the practice if appropriate when reporting to the CCG and NHS England

5. Membership

To be open to all staff, patients and carers of patients of **insert the practice name**.

6. Meetings

- Meetings will be held **state where and how often your meetings will be held**.
- These will be meetings attended by patients, carers of patients and staff of the practice.
- The group may wish to invite other organisations, health professionals and community representatives, who and when people are invited will be agreed within the group.
- Whenever possible at least one GP will attend.
- Meetings will be minuted and a clear record kept re attendance and decisions.
- Decisions will be arrived at by consensus and task allocation will be clearly minuted and agreed.
- New members to the group will be welcomed and have access to these terms of reference, previous minutes and reports. The ground rules and expectations will also be explained to new members.

- **If you are a committee or a small core group you may want to add:
In between meetings, the work of the PPG will be overseen by a committee drawn from the membership and carried out by smaller working groups made up by committee members, co-opted members and staff of the practice**

Did you know?

As a small group based having adopted terms of reference and serving residents in Brighton and Hove, you can join Community Works. Membership is free to groups with an income of under £35,000 and you can access support, including information, access to training, networking opportunities, volunteering support as well as one off bespoke guidance.

**For more information, contact 01273 234023, info@bhcommunityworks.org.uk
or visit www.bhcommunityworks.org.uk/ppgs**

4. Ground Rules

It is a good enough to establish some basic rules for your group meetings to ensure they operate well and that everybody feels supported to participated.

- Mobile phones on silent – feel free to participate or report via social media
- Allow people to disagree
- Challenge the issue not the person
- Confidentiality
 - In general, members may leave the meeting and repeat what was said, but not who said it
 - People may raise specific issues and ask for them to be kept within the group
 - Let the scribe know if you don't want comments noted (notes on flipcharts are public)
- Don't interrupt each other
- Do encourage participation
- No jargon please
- No language which could be construed as discriminatory or offensive to others
- Do not use your status to undermine others
- Treat each other with respect

5. How to write good minutes

Minutes serve several purposes:

- They are a historical record of a PPG's decisions and actions.
- They are a reminder of who was given assignments.
- They are evidence of deadlines.
- They are a benefit for people who are absent when decisions are made.

1. Understand the meeting

- Meeting minutes have no value if they are not accurate.
- Names and terms (e.g. BME, CCG, CVS), especially the PPG's own jargon, should be written in full, at least once, when first used at the meeting.
- Imagine a complete stranger reading the minutes – do they make sense?
- It's very difficult to take accurate notes if you are unfamiliar with what you're hearing, so try to do some preparation before the meeting.
- Make sure you understand the agenda and try to have a look at any related documents, such as minutes from previous meetings, or other documents mentioned. If you have the time you could build a glossary of names and terms from these documents; this can make minute taking easier, faster and more accurate.

2. Make the time

- Taking good meeting minutes takes time. Leave ample time for preparation, for the meeting itself, and for writing up the minutes after the meeting.
- Ideally the minute taker and the chair, or another representative, should speak immediately (and briefly) after the meeting to clarify any new names and terms.
- The sooner you can finalise and type up the minutes the better. Write up your notes while the meeting itself is still fresh in your mind, ideally in the hours immediately following the meeting, and certainly within 48 hours. As more time passes, you may forget important items that you heard but didn't write down. The more time that

passes, the less accurate the minutes will become, even if you have used a tape recorder.

3. Set up for success

- At the meeting, sit where you can see and hear proceedings clearly.
- It's really helpful if you can have good eye contact with the chair of the meeting, in case you need to check anything at any time.
- Prepare your materials for the meeting: i.e. your laptop or notepad, your agenda.

4. Total neutrality

- Remain neutral at all times. Do not participate in the debate, unless you are a quorate member of the group and your opinion and decisions are needed.
- In order to maintain a neutral voice in this, you can read back decisions that are made as they are made or at the end of the meeting to ensure everyone including yourself agrees with the decision and how it has been recorded.

5. Know when to leave things out

- A hallmark of good meeting minutes is the right balance between in-depth coverage of complex topics, and concise summary and paraphrasing of repetition. Physical note taking speed is not the most important skill. If you're unsure what somebody has just said, it's ok to ask, normally via the Chair (e.g. "How do you want me to record that in the minutes?").
- A good minute taker also knows when not to minute. In these moments, the minute taker will probably be pausing, listening, rephrasing and mentally summarising. It's also important that the minute taker can express the information clearly.
- The amount of information that the minute taker includes should vary according to the purpose to which the minutes will be put. Depending on the purpose, the right choice for minutes can vary from a very concise summary to a word-for-word transcript. The depth of coverage should always be agreed.

6. If you can use a consistent template

- Try to make sure that your minutes look consistent from meeting to meeting by using the same document template.

- This is more difficult but probably more important if you rotate the minute taker, people have different writing styles, take time for everyone to know the format/template and so are familiar with it when it is their turn to minute take.
- Since minutes must contain consistent information regardless of what gets discussed, it can also save a huge amount of time if you prepare a 'fill-in-the-blanks' form (Template) so you don't waste time writing down standard information every time. In fact, much of the information can be filled in before the meeting actually begins. As you prepare the template, make sure you have the following information:
 - Type of meeting (daily, weekly, monthly, etc.)
 - Purpose of meeting
 - Date, time, and location of meeting
 - Name of chair
 - Names of those in attendance
 - Approval of previous meeting's minutes
 - All actions that are made and who they are assigned to
 - Information regarding the next meeting (date, time, location)
 - Adjournment time
 - Name of the person who took the minutes and the date they were taken
 - Name of the person who approved the minutes and the date of approval (usually at your next meeting).

7. If you can and have time get somebody else to read over the first draft of your minutes

- Get someone else to check that the minutes are clear, easy to read, free of typos, in line with the agreed template.
- The person who is checking your minutes does not need to have attended the meeting. If your minutes make sense to an outside reader, you are well on your way to taking good minutes.

Not sure where to begin?

Community Works exists to support volunteers, community groups, non for profit organisations, businesses and charities within Brighton and Hove.

Call 01273 234023 info@bhcommunityworks.org.uk

6. Equalities statement and guidelines for PPGs

Introduction

The responsibility for ensuring equality and diversity within the PPG rests ultimately with the committee. Volunteers, members and committee members are responsible for the implementation of the policy, its observance, monitoring it on a day-to-day basis and reporting on its operation to the committee members.

Statement of Intent

The PPG recognises that certain individuals and groups are discriminated against on grounds of disability, race, ethnic origin, culture, socio-economic background, gender, sexuality, religion, creed, marital status and age. The PPG is committed to working towards eliminating all forms of discrimination both through its own work and through its employment policies and practices.

Recognising that passive policies will not achieve change, the PPG will take active steps to combat discrimination.

The Policy

Activities: patients must have easy access to information about the PPG which may involve making materials available where appropriate in a variety of media, e.g. in large print or electronically. In particular, all printed materials will be in a minimum of 12pt type. It is also recognised that the PPG will not be able to meet all the demands made upon it. There will be a drawn up and publicly available list of priorities which will be reviewed at least annually.

Recruitment and Selection: The group aims to receive the widest response to recruitment of volunteers, members and committee members. The range of publications and agencies

chosen will attempt to reflect the aim of reaching all sections of society. Details of the Equality and Diversity Policy will be given to all PPG members.

Flexibility: The PPG will endeavour to ensure that volunteers, members and management committee members are not discriminated against through the terms and conditions under which they are have been engaged. Furthermore, the PPG recognises that from time to time family and social circumstances may change and consequently that volunteers may need to leave the group permanently or for periods of time. The PPG will attempt, where circumstances and resources permit, to accommodate the needs of those volunteers.

Support: Volunteers are entitled to support from committee members. Volunteers will receive regular supervision from a named committee member

Training: The PPG recognises that training is an important factor in leading to achievement and opportunity. When needs are identified, every effort will be made to ensure that training and/or support is available.

Purchasing: The PPG will try to ensure that the goods and services it offers are accessible to all groups. It will not knowingly receive or purchase goods and services from agencies which practise discrimination.

Monitoring: Regular monitoring and reviews of all procedures will take place from time to time, to check the effectiveness of the group's Equal Opportunity Policy.

Date adopted (minuted)

Next review date

7. Support services for community groups/voluntary organisations

We want voluntary and community action to have the greatest possible impact on people in Brighton and Hove. We put in place the support and networks that make it happen. We help organisations and individuals across the city to make as big a difference as possible to local lives and issues. If you work or volunteer with a community group or voluntary organisation we can help:

- **To develop the skills and knowledge you need to undertake your role:**
Our learning opportunities cover a range of topics and areas, and are aimed at volunteers, paid workers, management committee members and trustees
- **To develop and grow your group or organisation:**
Our staff, trainers and consultants provide subsidised or affordable training, information, advice, and one-to-one support on areas including governance, management, planning, fundraising, team building and volunteering development
- **To find the professional skills you might not be able to afford:**
Our network of local businesses provides professional expertise, such as architects, engineers, accountants, solicitors, marketing, design
- **To identify your group or organisations' development needs:**
Our tailored needs assessment service provides you with an opportunity to look at your group or organisation as a whole. It identifies your strengths and areas for development and provides suggestions on possible next steps
- **To perfect your funding bids and increase your chances of success:**
Our read a funding bid service provides constructive critique of funding applications which are 90% completed. It highlights a bids strengths and any glaring mistakes or omissions, and makes suggestions that may strengthen your final submission
- **To access funds that turn your ideas into reality:**
The Community Health Fund is for small community groups with an annual income under £35,000, which are based in Brighton or Hove, and want to address a particular health issue or health-related activity. We can support you to apply and to link with other similar groups
- **To learn, network and influence with others:**
Our conferences are an opportunity to learn about an area of work, to network with others working or volunteering locally, and to influence our representation activities
- **Promote your volunteering opportunities across the city:**
We publicise over 200 opportunities every week to over 2000 interested people. We also support people looking to volunteer through our online information and tailored one-to-one telephone advice
- **Develop high-quality volunteering experiences for volunteers:**
We support groups and organisations to follow best practice in the management of volunteers. Support is available to new or existing groups and organisations who wish to start, develop or improve their volunteer programmes

If you need this information in a different format just get in touch to discuss your needs.

Voluntary and community action makes our society and our city a better place. We're here to make sure that it does

Community Works is a registered charity in England and Wales (no 1087481) and a company limited by guarantee (no 3895635).

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