**Checklist** **following successful appointment of members of the public**

Once the team have provided the opportunity lead with expressions of interest in response to an advert, this checklist will assist in progressing with the next steps for meaningful public involvement.

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| **Activity** | **Who** | **Completion details (date/any further actions needed)** |
| Development and dissemination of advert | Public Involvement and Engagement team and opportunity lead | Advertised (date) |
| Review of expressions of interest | Opportunity lead |  |
| Selection of individuals (you may wish to conduct interviews) | Opportunity lead |  |
| Inform all those who are successful of outcome and ensure contact details are added to any contact lists.  The public involvement and engagement team are able to contact those who are unsuccessful. | Public Involvement and Engagement team and opportunity lead |  |
| As soon as possible contact the successful individuals to discuss:   * their expectations * expectations of the research team * role description if there is one * confirm time commitment * confirm support available from opportunity lead * check any training needs * check any accessibility needs * confirm payment and any guidance available * confirm commitment to public involvement agreement. consider what process your organisation has to deal with any concerns * confirm format of the meeting * confirm meeting premises indemnity * indicate that if technical terms are used members will be asked to provide explanation * consider requesting a record is kept of how they feel they have impacted on the group in order to evaluate their involvement | Opportunity lead |  |
| Send papers two weeks ahead of first meeting, e.g.:   * terms of Reference * agenda * other papers | Opportunity lead |  |
| If financially supported by the Public Involvement and Engagement team, inform the team of the meeting date in order for them to send pre-approval forms to members  If providing financial support, ensure all processes are in place to allow timely payment. | Opportunity lead |  |
| Confirm with all attending the first meeting that jargon/acronyms/technical terms are to be avoided or explained | Opportunity lead |  |
| Consider a de-brief after each meeting | Opportunity lead |  |
| Consider all the support, including training for yourself and your team that is available from the Public Involvement and Engagement team and contact them with any queries | Opportunity lead |  |

The Public Involvement and Engagement team have developed this tool to assist opportunity leads. Please e-mail any comments to [research-involvement@wales.nhs.uk](mailto:research-involvement@wales.nhs.uk) in order for us to continually improve our service.