**Checklist** **for appointing members of the public to involvement opportunities**

Once you have submitted you request for public involvement support, this checklist will assist you to develop and progress a meaningful public involvement opportunity.

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| **Activity**  | **Who** |
| **Development of public involvement opportunity advert** |
| * Consider the application of the [UK Standards for Public Involvement](https://healthandcareresearchwales.org/public-help-research/uk-standards-public-involvement) to the opportunity; e.g. is it inclusive, are the communications well thought through.
 | Public Involvement team and opportunity lead  |
| **Collate the expressions of interest** |
| * Expressions of interest (EOIs) are directed straight to the public involvement mailbox
* The team respond to the individuals and collate their responses
* At the advert closing date, the EOIs are sent to the researcher/opportunity lead with identifiable information removed.
 | Public Involvement team |
| **Review and selection of expressions of interest** |
| * Researcher/Opportunity lead reviews the EOIs against the advert criteria
* You might want to interview individuals
* There are [three categories](https://healthandcareresearchwales.org/sites/default/files/2020-10/Three_categories_of_involvement_A4_eng_0.pdf) of involvement, based on experience required.
	+ For blue and green opportunities, we advise that expressions of interest from people with lived experience are considered before involvement experience in most cases.
* Notify the PI team the members of public you have chosen
 | Researcher/Opportunity lead  |
| * PI Team informs all those who are successful and provide contact details to opportunity lead
* The public involvement team contacts those who are unsuccessful using a standard template which does not include any feedback.
	+ If an individual requests feedback then the public involvement team will contact the opportunity lead to request this
 | Public Involvement team |
| **Next steps** |
| 1. **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 required and available e.g. a support worker or carer
* Check any training needs (including using Zoom or Teams)
* 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
* Consider the support, including training for yourself and your team that is available from the public Involvement team and contact them with any queries
* Confirm format of the meeting
* Confirm meeting premises indemnity
* Indicate that if technical terms are used members will be asked to provide explanation
* Ensure a record is kept by the members of public and researcher of how they feel they have impacted on the group and research, this will help to report impact and to evaluate their involvement

  | Researcher/Opportunity lead |
| 1. **Send papers two weeks ahead of first meeting:**
* Terms of reference
* Agenda
* Other relevant papers
* Offer the opportunity for the public member to ask questions about the papers and clarify any points
* Offer to arrange a pre-meeting with the member of public if needed

  | Researcher/Opportunity lead |
| **During the meeting** |
| * Confirm with all attending the first meeting that jargon/acronyms/technical terms are to be avoided or explained
* Highlight the importance of their lived experience to the development of the research work and that their perspective is important
* Facilitate the involvement enabling the member of public to share their views
* Consider a de-brief after each meeting use to record impacts and outputs of the public involvement
 | Researcher/Opportunity lead |
| **After the meeting** |
| * If financially supported by the public involvement team, inform the team of the meeting date in order for them to manage the payments
* If your institution is providing financial support, ensure all processes are in place to allow timely payment.

  | Researcher/Opportunity lead |
| **On completion of the study/ project** |
| * Inform the public//patient contributor of the outcome of their involvement. Let them know of any changes made to the research as a result of it.
* Inform the public//patient contributor of the outcome of the research project in the way you would participants.
* Ideally you would have involved the public/patient contributor in your dissemination plans
* Inform the public//patient contributor of any opportunities available for them to continue with supporting. E.g., attendance at conferences, webinars
* Send a letter of thanks acknowledging their contributions
 | Researcher/Opportunity lead |

The public involvement team has developed this tool to assist opportunity leads. Please email any comments to research-involvement@wales.nhs.uk in order for us to continually improve our service.