

Working with Involvement Partners to make a difference

This document has been written to support staff when involving service users, carers and family members in projects, in meetings and in other involvement opportunities.

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Why we involve people

We involve people in improving services because it is important to understand what matters to people, their views, what we are getting right and what needs to improve.

By working together and bringing in a range of views, skills, knowledge and experiences we can make better informed decisions that lead to services that are more caring and better meet people's needs.

Our Involvement Principles

We are committed to working in genuine partnerships to improve services. It is important to include people who use services, their carers and families, people from our local communities and staff from local organisations in the decisions we make.

By focussing on what matters to them, we will provide services that better meet people's needs and make a positive difference to their health and wellbeing.

We follow the below Involvement Principles when we're creating partnerships and involving people in improvement work:

1. **Ensure people can have influence over decisions and make a difference**
2. **Include and listen to people with lived experience** in collaborative partnerships
3. **Include and listen to the diverse communities we work with** in collaborative partnerships. We should also **reach out beyond the collaborative partnership and connect with the wider community** so other people can share their views and contribute to the partnership's work
4. **Give time to build relationships** in the collaborative partnership based on mutual trust and respect, kindness, openness and honesty
5. **Support people so they can use and develop their knowledge and skills to contribute effectively**
6. **Plan, decide and act together** including agreeing the purpose, resources, outcomes and timescales from the start of the work
7. **Have honest conversations** that emphasise dialogue where we listen to and understand others' views and agendas and give the time to arrive at collective answers
8. **Make communication simple, accessible and inclusive**, share the information that enables people to be part of the conversation and feedback on what has changed

Where we are undertaking one-off pieces of work, meetings, consultations etc where there are not opportunities to create an ongoing partnership, the above principles should be applied as well as they can.

Additional information:

- Appendix 1: Nottinghamshire Healthcare's Involvement Principles
- Appendix 2: Making the Involvement Principles real

Working together – Before, During and After

Before

Planning before you begin your piece of involvement work will give you, and others, the confidence that it will be inclusive, constructive, respectful, well-paced and have integrity. It is important to be clear on what you are trying to do, the timescales and what people can and can't influence. You should consider who should be involved and how you will include diverse communities. You will also need to be clear about practicalities such as what information is needed, how you will facilitate inclusive meetings and how people are supported and paid expenses.

During

As you progress, you will want to gather as many views and ideas as possible, from the widest and most diverse group you can. When you meet you will need time to build relationships, trust and effective communication. You will need to agree principles, expectations and outcomes. You may also need to look at how you gather and share information as well as ideas and views from a wider community. Bringing these together and interpreting them transparently gives credibility and allows the best ideas and recommendations to emerge. On longer projects you will also want to review how well the group is working together and make sure everyone feels engaged and heard.

After

As you draw your involvement work to a close, you will want to be clear about what has been decided and achieved, how (and to whom) you will communicate the outcomes and what will happen next. You will want people to feel good about having been involved and you will want to recognise their contribution so that they know they made a difference.

The document below will guide you through the things you will want to consider at the beginning, during and at the end of your involvement work (you might take a lighter-touch with short, small-scale pieces of work).

Additional information:

- Appendix 3: Planning Involvement - Before, During and After

Our support for you

You will be supporting the Involvement Partners; The Involvement, Experience and Volunteering Team is here to support you.

Some of the things we can support you with:

- Planning – Talk us through what you’re hoping to do, and who you’d like to involve, and we can advise you on how to go about it.
- Our advice and support to you to register, reimburse expenses and support Involvement Partners
- Promoting your involvement opportunity - We might be able to help you find the people you want to involve (online, from local networks/groups, from your service)
- Hosting you - We have two Involvement and Volunteering Hubs with meeting rooms and equipment. You can book this space by contacting us.
- Getting started - We may be able to attend your first involvement meeting/group to help you set up how the group will work together and make decisions collaboratively
- Co-facilitation – We may be able to co-facilitate your project with you.
- Problem solving – If you have any problems when involving people, we’re here to help you solve them.

If you would like our support, contact us and we will ask you to describe what you’re planning (and what help you would like) on our New Works form. We’ll use this to inform the help we offer you and the resources we can share with you.

Additional information:

- Appendix 4: New works form
- Appendix 5 - IEV Team, Criteria for New Works

Registering, supporting and reimbursing Involvement Partners

Registering

Involvement Partners need to be registered on the Trust’s central Involvement Register. Among other reasons, this is so that we legally and safely store their details and the details of their emergency contact.

The IEV team will be promoting opportunities and sharing the registration page widely, you can also do this:

involve.nottshc.nhs.uk/get-involved-make-a-difference/

Reimbursing

The Trust will reimburse people’s expenses when they get involved, including travel. It is important to offer this and process expenses promptly to enable everyone to contribute.

Please provide Involvement Partners with the Expense Claim Form. Please sign this to confirm the expense claim is legitimate, and email to the IEV team (involve@nottshc.nhs.uk) and we will approve/process them for payment.

Additional information:

- Appendix 6: Expense Claim Form

Supporting

Once registered, Involvement Partners will receive a 'Welcome to Involvement' email from the IEV Team (and may receive more support from us if they need it). As the Involvement 'Host', you are responsible for supporting the people you have involved.

You should aim to provide any reasonable pastoral and practical support to enable them to feel comfortable and to participate fully and confidently.

We recommend you:

- Contact all Involvement Partners prior to the first group meeting/call to answer any questions they might have and share any information you can.
- Support people during their involvement by:
 - always making it clear what is expected of them
 - ensuring there is space and time for their input
 - recognise that talking about their own or their loved one's experience could be distressing, give them time before/after to raise any worries or debrief
 - understand people's preferences and difficulties with communication
 - check in with the group (and individuals) regularly to ask whether people understand how things are progressing, and feel engaged and heard

People may also be contacted by the IEV Team regarding group support (for example, those involved in interviews or Quality Improvement Projects). This is optional but might be helpful to them and will help us to understand whether we're doing a good job of involving people.

Contact the Involvement, Experience and Volunteering Team

We can help you with all of the above. Contact our team on:



involve@nottshc.nhs.uk



0800 052 1415 / @involvenottshc (Twitter/Instagram)



Involvement and Volunteering Hubs

Ollerton (NG22 9SZ) and Mapperley (NG3 6AA)

Appendix 1:

Nottinghamshire Healthcare's Involvement Principles

We are committed to working in genuine partnerships that include people who use services, their carers and families, people from our local communities and staff from local organisations.

We aim to work together to focus on what matters to people and improve services and people's lives.



Ensure people can have influence over decisions and make a difference



Include and listen to people with lived experience in collaborative partnerships



Include and listen to the diverse communities we work with in collaborative partnerships. We should also **reach out beyond the collaborative partnership and connect with the wider community** so other people can share their views and contribute to the partnership's work



Give time to build relationships in the collaborative partnership based on mutual trust and respect, kindness, openness and honesty



Support people so they can use and develop their knowledge and skills to contribute effectively



Plan, decide and act together including agreeing the purpose, resources, outcomes and timescales from the start of the work



Have honest conversations that emphasise dialogue where we listen to and understand others' views and agendas and give the time to arrive at collective answers



Make communication simple, accessible and inclusive, share the information that enables people to be part of the conversation and feedback on what has changed

Where we are undertaking one-off pieces of work, meetings, consultations etc where there are not opportunities to be part of an ongoing partnerships then the above principles should be applied as well as they can.

Appendix 2: **Making the principles real**

Our Involvement Principles are a commitment to undertake involvement work fairly, inclusively and honestly, supporting those involved to contribute meaningfully.

Principles make a strong statement but only make a real difference when we work through HOW they should be enacted in our work.

Below are our ideas for how to make each principle real. You, or your involvement group, may be able to generate more ideas for how each principle comes to life in your work.

1. **Ensure people can have influence over decisions and make a difference**

Be clear at the start of any service change/project what it is that people can influence and what they can't.

Be clear about who is making which decisions and if the partnership is making decisions or advising another group/person.

2. **Include and listen to people with lived experience in collaborative partnerships**

Recruit people with lived experience (patients/service users and their carers/families) from the start of the partnership.

Facilitate meetings to ensure that people with lived experience can contribute in ways that work for them (with an awareness of how vulnerable and exhausted people can feel when/after sharing their experiences).

Make time to listen to people's experiences, with the intent to understand.

Plan meetings with people, rather than for them.

3. **Include and listen to the diverse communities we work with in collaborative partnerships. We should also reach out beyond the collaborative partnership and connect with the wider community so other people can share their views and contribute to the partnership's work**

Take time to understand the demographics and diversity of people accessing your service, and how you will recruit people (patients/service users and their carers/families) from these diverse communities.

Consider whether there are groups in the wider community who have difficulty accessing your service, and why. Consider how to involve them in some way to understand the barriers they face and incorporate their views into your work.

Consider whether you need a different approach to best reach out to each group (e.g. different languages, different community networks, via support workers/families).

4. Give time to build relationships in the collaborative partnership based on mutual trust and respect, kindness, openness and honesty

Make time to get to know each other, facilitate conversations based on understanding who is involved, their experiences, skills and knowledge, and the interest they have in being involved.

Be honest, clear and upfront with information, even when conversations are difficult or contentious.

Nurture kindness amongst the group – facilitate dialogue rather than debate, insist on and reinforce mutual respect and encourage understanding.

5. Support people so they can use and develop their knowledge and skills to contribute effectively

Offer pre-meets so that you can establish if anyone needs your support with access, communication, comprehension or relational aspects of meeting as a group. Introduce yourself and answer any questions.

Offer individualised support – this is not clinical input, this is the support they need to engage fully and comfortably (e.g. explanation of information, time to formulate opinions rather than being ‘put on the spot’, further information about transport).

If there is time, provide opportunities for the group to learn and develop skills together – e.g. deliver a session on collaborative working, or Debate vs. Dialogue.

6. Plan, decide and act together including agreeing the purpose, resources, outcomes and timescales from the start of the work

In the first meeting, establish everyone’s views of the purpose and desired outcomes and reconcile this to agree the collective view of the group.

Be clear about timescales, time constraints and resources, and agree as a group the milestones, the decision points and how you will progress towards the solution.

7. **Have honest conversations** that emphasise dialogue where we listen to and understand others' views and agendas and give the time to arrive at collective answers

Resist the temptation to persuade/convince people of your view – listen fully, explore alternatives and entertain different possibilities before drawing discussions to decisions.

Nurture active listening and inquisitive questioning. Start questions with open language (e.g. *Can you help me to understand X, Why do you feel this would work?*).

Employ and encourage the skills of dialogue with the purpose of understanding, rather than pitching suggestions against each other (i.e., debate).

8. **Make communication simple, accessible and inclusive**, share the information that enables people to be part of the conversation and feedback on what has changed

Follow the Plain English Guide – keep written and verbal language simple, avoid jargon and acronyms/initialisms.

Written information should be well-formatted, using bullet points and lists where appropriate, minimum 12pt clear font, with high contrast between the font and the background.

Consider whether someone would need additional information/context to understand the information you are sharing. If so, include this but try to be concise.

Appendix 3: Planning involvement: Before, During and After

This checklist is designed to help you plan your involvement. Working through this checklist (and referring to the additional documents) should give you confidence that you have considered all the major aspects of a genuine piece of involvement work.

- If you are planning a one-off piece of involvement work or a single engagement meeting, use the **‘Light touch’ check list**
- If you are planning a project over a number of weeks/months with a sizeable group of people, use the **‘Thorough’ check list**

Light Touch	Thorough	
BEFORE:		
<input type="checkbox"/>	<input type="checkbox"/>	Help from the IEV Team: Consider calling the Involvement, Experience and Volunteering Team – we may be able to help with planning, recruiting people and facilitating good involvement.
<input type="checkbox"/>	<input type="checkbox"/>	Understand the timescale and scope of influence: How does the engagement you are planning fit into the wider business planning? It is important to know this so that you can be clear about what you are looking to work with people on, how long you have, how wider service planning is progressing and what people can and cannot influence.
<input type="checkbox"/>	<input type="checkbox"/>	Recruiting people: consider who needs to be involved and how you’ll recruit them <ul style="list-style-type: none"> - Who could be affected by the change or would have relevant experience? - How will you promote the opportunity and invite people to get involved? - How will you include people from our diverse communities? - Do you know how people register themselves as Involvement Partners?
<input type="checkbox"/>	<input type="checkbox"/>	Supporting people: What support are you offering to people (pre-meets or follow ups, a named person to contact, training or preparation). Could you welcome carers/support workers so that everyone feels comfortable and can speak up?
<input type="checkbox"/>	<input type="checkbox"/>	Sharing information: Share whatever you can at least one week prior to the event, clearly and concisely. Include: <ul style="list-style-type: none"> - What is it you’re inviting people to - The agenda/plan for the time - Dates/times (think about offering weekend dates/meetings out of hours to engage as widely as possible) - Joining instructions and support (if virtual)

		<ul style="list-style-type: none"> - Locations and directions (if face-to-face) - Who people should contact if they have a problem - Who else is involved and who is hosting
<input type="checkbox"/>	<input type="checkbox"/>	<p>If meeting in person, consider:</p> <ul style="list-style-type: none"> - Accessibility of the venue - transport links/parking, where people need to report to on arrival - Facilities (toilets, refreshments) - Comfort in the room (chairs, tables, noise, distractions)
<input type="checkbox"/>	<input type="checkbox"/>	<p>If meeting virtually, there will be varying levels of ease with technology (e.g. muting, camera). You'll need to:</p> <ul style="list-style-type: none"> - Decide (and explain) how you're facilitating - multiple speakers/discussions/raising a hand/asking a question/using the chat function - Decide which is the most appropriate virtual platform (MS Teams is the Trust's preferred/approved platform)
<input type="checkbox"/>	<input type="checkbox"/>	<p>Reimbursement for expenses: The Trust's Reimbursement Policy clarifies what people can claim - share the Expense Claim Form (on paper/electronically), be clear where people return this to and be prepared to process these swiftly.</p> <p><u>See related documents (available from the IEV Team):</u></p> <ul style="list-style-type: none"> ▪ Reimbursement Policy 8.04 ▪ Expense Claim Form
<input type="checkbox"/>	<input type="checkbox"/>	<p>Hosting, facilitation and notetaking: It is important that you have someone in the room with strong knowledge of the service/intended change/drivers, and someone who can facilitate more objectively (ideally this person should be removed from the issues that are being discussed). This will enable the most candid, inclusive conversations and fair decision making.</p> <p>Think about notetaking to ensure it doesn't get in the way. If you can, record the meeting so that notetaking can be done away from the session, as a result they will be more thorough and not just capture points that have managed to be recorded.</p>
<input type="checkbox"/>	<input type="checkbox"/>	<p>Group size and staff/Involvement Partner ratio: Involvement shouldn't feel like a staff meeting with service users present; too many staff may prevent a service user from being comfortable speaking up, so you can end up with staff solutions and visions. Try to keep numbers sensible and balance the room, thinking of the power dynamic and the opportunity for everyone to speak.</p>
<input type="checkbox"/>	<input type="checkbox"/>	<p>Understanding what's around: Gather, share and discuss information and data – local information and knowledge, data about the community and its needs, financial information, feedback about services, policy and guidance, good ideas from elsewhere</p>

DURING: YOUR FIRST MEETING		
<input type="checkbox"/>	<input type="checkbox"/>	<p>Confirming the timescale and scope of influence: Being clear about the purpose of bringing people together, the timescale, the resources available and what can be influenced is <u>crucial</u>. Even if these conversations are difficult, it will always be better to be honest and clear about this upfront.</p>
<input type="checkbox"/>	<input type="checkbox"/>	<p>Agreeing how you'll work collaboratively: Do this early on to reassure people that their views are welcome and their contributions will be valued.</p> <ul style="list-style-type: none"> - Refer to the Involvement Principles - Develop a 'Let's Be' agreement together which establishes expected behaviour (e.g. respect for each other's views) (*not needed for light touch) - Create a Terms of Reference (*not needed for light touch) - Discuss how decisions will be made and who has overall responsibility when there is disagreement - Share responsibilities in the group (e.g. host, facilitator, notetaker) <p><u>See related documents:</u></p> <ul style="list-style-type: none"> ▪ Nottinghamshire Healthcare's Involvement Principles ▪ Sample Let's Be agreement ▪ Facilitating Involvement Meetings
<input type="checkbox"/>	<input type="checkbox"/>	<p>Agreeing the aim: Spend time understanding the different perspectives on what you hope to change and what you're aiming for. Consider how you'll measure the change/difference.</p>
	<input type="checkbox"/>	<p>Return to understanding what's around: Ensure you have everything available to you and consider whether you could gather more/different information to supplement what you and the group know.</p>
<input type="checkbox"/>	<input type="checkbox"/>	<p>Gathering ideas: Gather ideas, views and feedback on plans. Nurture conversations which enable people to be inspired by the suggestions of others and to build on them. Devoting time to this collaboratively thinking will result in better ideas and solutions, if you have the time, don't rush this.</p>
	<input type="checkbox"/>	<p>Who else: Based on the discussions you have, and the gaps identified, discuss if there is anyone else who needs to be involved (e.g. carers and families, local organisations, staff)</p>
DURING: ONGOING		
	<input type="checkbox"/>	<p>Planning: Agree a plan for the project with responsibilities and timescales. Consider setting up a planning group, if the project requires it, to plan the meetings (setting agendas, ensuring good inclusive conversation, keeping a grip on what needs to be decided and by when).</p>

	<input type="checkbox"/>	Get to know each other: Take time to understand who is involved - their skills, experience, knowledge, roles and agendas. Make time to understand each other and what each person contributes.
	<input type="checkbox"/>	Communication: Agree how you will share information during and between meetings. Ensure that all information is clear, concise, can be comprehended without further context (where possible) and accessible.
	<input type="checkbox"/>	Time to reflect and review: Take time to reflect on how the group are working together, to return to the Involvement Principles and Let's Be agreement, and to consider whether you are achieving what you set out to achieve.
	<input type="checkbox"/>	Notes: Share notes (in draft) from each meeting within the week, invite the group to agree/object to this as a record of the conversations and add/amend as they see appropriate.
AFTER:		
<input type="checkbox"/>	<input type="checkbox"/>	Conclude: Agree with all involved what the outcomes were, how well you worked together and any follow up
<input type="checkbox"/>	<input type="checkbox"/>	Communication: Share the outcomes of the work with all those who might be interested/affected, and thank all those who contributed.

The above checklist was informed by [Nottinghamshire Healthcare's Collaborative Model](#), which was developed over two years with a large collaborative group of staff, service users, volunteers and [The Kings Fund](#).

Appendix 4:

Request for support/volunteering role from the Involvement, Experience and Volunteering Team

We receive many requests for support, which is a positive indication that the Trust is working hard to listen to and involve people and recognise the role of volunteers.

We try to accommodate all requests. Sometimes we won't be able to provide exactly what is requested but we'll always endeavour to help in some way. We have to make decisions about how our time and resources are best spent for maximum impact on patient experience and care.

Requesting support from the IEV team:

Please complete this form as fully as you can. It doesn't need to be well written, but please be as detailed and clear as you can what it is you need. We are more likely to be able to offer you support and dedicate the appropriate time and skills from our team to help you if we understand the request.

Name/email of the person responsible for this work/main point of contact:			
Please complete the below to identify your service:			
Division		Directorate	
Service		Site/location	
Please describe the work you would like us to help you with/the volunteer role you would like to create in your service:			
Please describe the help you would ideally like from us:			
<ol style="list-style-type: none"> 1. Advice/support (One off) Brief inputs – advice, guidance, quick consultation, training, attending away days 2. Working with (Ongoing) Supporting projects/shaping work or services, ongoing attendance at meetings/forums 3. Leading on (Ongoing) Running or organising projects/groups/collaborations 			

For involvement and/or experience activity:

What is the time commitment (e.g. 1hr monthly, approx. 3hrs weekly) and over what period?

When do you anticipate the work starting?

How will the work be sustained once the IEV team have delivered on the support requested?

What difference do you feel our support will make?

What are you trying to achieve, and what do you consider to be the impact on patients (and/or carers and families)? **Please consider whether the work contribute to addressing health inequalities.*

Who do you want to involve in this work? *(Consider all those who might be affected by the service change, and whether people would need any specific experience/skills).*

Have you considered how we could reach these people? *(e.g., contacting existing/recently discharged patients via S1/RIO, patient/carer groups, social media)*

For a volunteering role:

What would a volunteer contribute/what is the role you would like them to do?

How many volunteers do you need?

What skills, knowledge or experience are you looking for in a volunteer?

--

What is the time commitment and over what period?

--

When do you need the volunteer/s to start?

--

All volunteers have named Placement Officers who provide support to volunteers in their roles. Who would be the named Placement Officer?

--

Have you considered how we could recruit these volunteers? Are there any specific networks we could contact? (e.g, patient/carer groups, volunteer networks, social media).

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OFFICE USE ONLY

Reviewed at New Works Panel on [date]:	
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Decision:	
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If agreed, responsible member of IEV team (and supporting staff):	
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Appendix 5: IEV Team Criteria for New Works

The IEV Team will work through the below criteria, in reference to submitted New Works Forms, to make the decision to support/prioritise requests for support:

Priority

- Which Trust, Divisional or IEV Team priority does it contribute to?

Impact

- How will it make a difference to service users/carers?
- How will it impact on health inequalities?
- What difference will our input make to whether it goes ahead or how effective it is?

Practical

- Type of ask: Are we clear about the work and the support requested?
- Does the work/support fall within scope for our team?
- Do we have the appropriate experience/skill?

Responsibility

- Are we clear on who would be responsible and who carry out the work in our team (if different)?

Timescale

- Can we complete the work in the set timescale to a standard we are happy with?

Capacity

- Staff – do we have the necessary capacity to undertake the work?
- Volunteers – do we have volunteers with the capacity to undertake the work?

Decision:

- Support in full (as per request)
- Support in part
- Do not support

Work which meets the below criteria need not come to the New Works discussion:

- Under ½ day's work
- An existing role for a new site/meeting, the work for which impacts only on yourself and you have the capacity to do/support
- An addition to ongoing work (e.g. extended timescale or spin off meeting), the work for which impacts only on yourself and you have the capacity to do/support

**Involvement, Experience & Volunteering
EXPENSES CLAIM FORM**

PART A - to be completed by ALL claimants

Name	<input type="text"/>		
Home Address	<input type="text"/>	Account Name:	<input type="text"/>
		Account Number:	
		Sort Code:	
Email	<input type="text"/>	Bank Name:	<input type="text"/>
Contact Number			

PART B – to be completed by ALL claimants

DATE	Volunteering/Involvement Partner Role Location & Activity	Mode of Transport	From: Postcode	To: Postcode	Single or Return	Mileage rate	Amount
						Total A:	
Other Expenses—Meals/Stationery/Telephone/Parking etc.							
Date	Description						Amount
						Total B	
						Grand Total (A+B)	

COST CENTRE: P51317

PART C – to be completed by ALL claimants

I certify the following:

1. The expenses claimed have been actually and necessarily incurred by me, on **authorised Trust business**. This claim is in accordance with my conditions of volunteering and/or Involvement Partner role.
2. The amounts claimed are in accordance with the applicable rates.
3. I have not claimed, or received, part or all of these sums from any other source.
4. I have the prior approval of the IEV team

Please note that if you are claiming expenses from mileage:

- I confirm that my vehicle is covered by appropriate insurance and that the policy is maintained at the date of the claim.
- I confirm that the vehicle is maintained at all times in a roadworthy condition by terms of the insurance policy covering the vehicle.
- I also confirm that by claiming mileage I hold a valid driving license, that the car is taxed and if applicable has a current MOT certificate.

Signature of Claimant:

Date:

PART D – to be completed by Placement Officer and/or IP Host

I certify the following the above volunteer/IP has attended on the days indicated and that the claim is correct and has not been paid from Petty Cash.

Signature: _____ **Date:** _____

PART E – to be completed by IEV Team Member

I certify that the above claim has been checked by me for accuracy and is in respect of expenses incurred whilst on authorised Trust business.

Signature: _____ **Date:** _____

Important Notes

- If any Parts of the form are incomplete, the claim will not be processed
- All claims must be supported by receipts (where applicable)

COST CENTRE: P51317