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## **Toolkits for Patient and Public Involvement**

### **A review for**

South West London Renal Unit

14th April 2005

Toolkits are highly variable. None appear to have been formally evaluated. This paper lists the main ones available on the web and points to their uses.

### **National toolkits**

The first three mainly concentrate on guidance for PPI professionals/Senior Trust Managers. They include guidance on

Baseline assessments

Annual plans

Developing a strategy

Performance management

Guidance is about how to the above

### **Strengthening Accountability: Involving Patients and the Public**

[http://www.dh.gov.uk/PublicationsAndStatistics/Publications/PublicationsPolicyAndGuidance/PublicationsPolicyAndGuidanceArticle/fs/en?CONTENT\\_ID=4008005&chk](http://www.dh.gov.uk/PublicationsAndStatistics/Publications/PublicationsPolicyAndGuidance/PublicationsPolicyAndGuidanceArticle/fs/en?CONTENT_ID=4008005&chk)

Strengthening Accountability own strength is a comprehensive description of the methodologies but it provides no guidance as to the cost benefits of particular methods.

### **Building Strong Foundations: Involving People in the NHS**

[http://www.shstrust.org.uk/publications\\_reports.htm](http://www.shstrust.org.uk/publications_reports.htm)

Building Strong Foundations is well produced and easy to use. It is divided into three parts with an excellent reference section for those wishing to do research.

It covers much of the same ground as Strengthening Accountability .

### **Signposts: A practical guide to public and patient involvement in Wales**

<http://www.wales.gov.uk/signposts>

#### **Signposts 2**

Signposts 2 Putting Patient and Public into Practice in Wales was written to supplement Signposts. It concentrates on Community development, engaging and developing staff.

“Identifying the training and development requirements of different audiences” is emphasised.

“It is possible to design training modules for each staff group around the development areas identified “

It provides examples of training in



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Awareness raising and customer care

- engaging practitioners
- learning networks and developing involvement skills
- involving patients in staff training and development
- the use of drama

It also reviews the importance of PPI in Clinical Governance, performance management and takes the reader through performance management, systems in place to support, from electronic records, through complaints to expert patient programme. Benchmarking and evaluation are also covered.

This is the only one of the 'toolkits' that attempts to involve the reader and it does have forms for self evaluation and scoring.

**The Centre for Public Scrutiny Committee** has produced a self assessment toolkit for Overview Scrutiny Committees. This is a checklist and is comprehensive.

## **Other Resources**

### **Information**

The Department of Health has produced an excellent toolkit for the production of written patient Information. Title: Toolkit for Producing Written Information. It provides good guidance to other sources of help.

### **Formal Guidance resource**

The Commission for Health Improvement produced CHI An A to Z of current patient and public involvement issues and guidance. Although now some of the sections have been superseded by new guidance it is an excellent overview document to sources of guidance and legislation.

### **Web resource**

The National Electronic Library has a valuable PPI platform which gives access to the papers and toolkits [http://www.nelh.nhs.uk/nsf/patient\\_involvement.htm](http://www.nelh.nhs.uk/nsf/patient_involvement.htm)

### **Survey/Questionnaire Design**

Advice Centre for the NHS Patient Survey Programme.

The role of the Advice Centre includes identifying and developing questionnaires; providing documentation and advice on how to conduct the surveys; acting as a data centre to collate, check quality and analyse the survey data and supporting health service providers to use the survey results to identify priorities for quality improvement in patient care.

<http://www.nhssurveys.org/>



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## **Scotland**

The Scottish NHS is a good source of relevant documents. These cover advocacy, communication and mental health awareness and the need for training.

[http://www.shstrust.org.uk/publications\\_reports.htm](http://www.shstrust.org.uk/publications_reports.htm)

## **Local Toolkits**

Examined in detail 30 sites that looked promising from the 25,000 references on Google.

Many PCTs are producing toolkits that are a localised version of the big three. (See Greenwich NHS own Pocket Guide/Toolkit for Staff October 2004)

Some have produced checklists as toolkits.

Others have concentrated on one specific aspect of PPI

For example Charnwood and North Leicestershire PCT has produced an excellent toolkit on Patient Information for PALS <http://www.cnwlpct.nhs.uk/xform.asp?folder=ppi>

They have also produced a good document for producing patient Information (written). Both available from their web site.

Lambeth PCT is piloting comment cards as part of its toolkit development.

Many PCTs are committed in their strategies to producing toolkits but have not recorded their completion on their web sites.

## **In Summary**

The best toolkits, not surprisingly, were those that were targeted to a specific audience and that could therefore include comprehensive detail on how to. The information toolkits are models of this. The guidance we would give to those seeking the holy grail of toolkits is to be specific in defining the task you wish it to perform and then do a search on the web sites that are listed here for those most relevant to your needs.