

## PPI Researcher Guidance 1: Key guidance for researchers when recruiting and working with PPI contributors

This guidance has been developed by PPI leads from the Oxford PPI Staff Group and PPI contributors from one or more of these [PPI groups](#)<sup>1</sup>. It is piloted with researchers<sup>2</sup>.

Any changes to the original document are those of the users and not necessarily those of the Oxford PPI leads group. Original versions of Researcher PPI guidance and templates are available on the Oxford BRC website or from one of the [PPI staff leads](#).

The following guidance is to help researchers establish trusting relationships with PPI contributors; ensure that the PPI contributors feel valued; and ensure the activities required are completed satisfactorily.

Please read this information before recruiting or giving activities to PPI contributors.

### 1. Recruiting PPI contributors

#### 1.1 Advertising

In your advertisement for PPI contributors, ensure you explain:

- What the project is – a clear lay summary, including why PPI support is being sought and how the research will ultimately benefit patients
- How much time is expected (e.g. hours per week/ad-hoc).
- The project duration (e.g. 3 years).
- Why you need PPI input and explain what value you hope PPI input will bring.
- What skills, experience, background of PPI contributors you are looking for.
- Whether “lived experience” of the condition being studied is necessary.
- What training and support will be offered to help people fulfil their role.
- Explain what you need from people in terms of showing their interest in the role e.g., an email outlining why someone is interested and is suitable for the role, a film or audio (some people are not comfortable writing and other methods can be more inclusive).
- Do not use the term “expression of interest” on your advert as it is not clear what it means to some people.
- If there is a role description, include in the advert or explain how people can have access to it.
- Payment and expenses – including how much will be paid and acceptable expenses and provide a link to payment rates/policy.

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<sup>1</sup> The group meets quarterly and includes leads from the [local NIHR organisations](#) and departments of the Oxford University Medical Sciences Division. One or more PPI contributors from these [PPI groups](#) have also reviewed.

<sup>2</sup> This document is being piloted (December 2023-April 2024) with researchers. Any suggestions for improvements should be sent to [Rachel.taylor@ouh.nhs.uk](mailto:Rachel.taylor@ouh.nhs.uk).

- What you would like in the responses to your advert (e.g., what information about the person/their experience/availability do you need).
- Whether you will hold an interview process, and what format this will take. This should generally be an informal interview rather than formal (ie. More of a friendly chat with each party having opportunities to ask questions)
- Any informal interview process should be explained and the rationale for an interview (e.g. to select people based upon the role description, allow questions etc). Please note: an interview process may not be appropriate, so use what is appropriate for the specific role.
- Deadline and email/phone number for response/questions.
- Provide contact details for questions.

## 1.2 Receiving responses to advert

When you receive a response, ensure:

- You email back relatively quickly (ideally within two working days) to thank the person and outline next steps (e.g., information chat – see below).
- If you think the person who has responded is not suitable for the role, politely explain why (e.g., that you are seeking people who have a particular condition or from a particular community) and offer links to other opportunities e.g. Slide 12 of “New PPI contributors” slides (attached to email).
- If you receive multiple responses, there needs to be a process for selection – this might be one of or a combination of the following and the criteria needs to be made clear to people applying:
  - “first come, first served”,
  - based on (informal) interview
  - random selection
  - selection based on need (e.g., women over 75).

Consider other forms of communication to ensure people who do not use digital devices can be included. For example, on a poster, put a telephone number and if people contact you offer to send information in the post.

## 1.3 Informal interview (online or in person)

Ideally, have an initial informal interview with a prospective new PPI contributor to:

- Build a relationship with the contributor.
- Ensure they understand what is being requested.
- See if they are suitable for the role i.e. have the relevant experience.
- Give opportunities for asking questions/clarification.
- Explain confidentiality in relation to the project.
- Outline the induction on offer and ask if they have any training needs (generic induction information is being developed – please contact [Angeli.Vaid@ouh.nhs.uk](mailto:Angeli.Vaid@ouh.nhs.uk) for signposting to resources).
- Explain payment/reimbursement processes and link to information (e.g. policy and how to claim).
- Explain how you will let them know the difference their input has made.

- If appropriate, prior to the chat, questions can be sent in advance so that people have time to think about how they respond – this can make the process more inclusive.

If an offer is made:

- Allow time for the PPI contributor to think about the offer and give them a date to get back to you.

#### 1.4 **Partnership working with PPI contributors: your duties**

When working on activities/tasks with PPI contributors, you are advised to follow these tips:

- Be sure to maintain open and friendly communication channels throughout the project.
- Be clear about what you are requesting and work collaboratively with the PPI contributor to clarify the activity
- Give guidance on the amount of time you expect it to take with a reference to the payment e.g. you could say something like “I would expect this to take about 2 hours and the payment would be £50”
- Provide a confidentiality statement and/or declaration of conflicts of interest for their signature if required for the work (PPI Template 2 – confidentiality agreement).
- Explain why their input is needed and how it will be helpful.
- Tell them the date you need the completed work back (for example, within 2 weeks).
- Provide opportunities/contact for asking questions/clarification.
- Make it clear what payment to expect, how and when they will receive it and provide them with the document “PPI Template 3 – payment information for PPI contributors”.

Once activities are complete:

- Thank the contributor.
- Give feedback to the PPI contributor on the difference their input has made.
- If it was an event, use the feedback form to collect feedback (PPI Template 1 – feedback form)
- Consider using one of the reporting tools available to record the impact of the PPI. See [Equator Network](#) for reporting tools.

## 2. **Concerns or difficult situations when working with PPI contributors – guidance for staff**

Occasionally there is a concern or difficult issue when working in partnership with PPI contributors e.g.

- Carer costs, travel or accommodation expenses are higher than the policy. (See Oxford BRC payment policy).

- An activity is not completed to a satisfactory standard and / or it seems that the PPI contributor has not spent the appropriate amount of time on the activity
- Regular late arrival or not contributing to meetings.
- Group dynamics that you feel uncomfortable about.
- There is something else you are concerned about and would like advice.

Please follow this guidance:

- Remember to maintain friendly and open communication throughout.
- Ask how the contributor is and how they are finding their PPI activities – do they have any concerns?
- Revisit with the contributor the initial request to ensure that there is clarity on what is being asked.
- If appropriate, provide a deadline for the completed work and if explain that if the next deadline is missed, there will be no extensions.
- Explain that for payment to be made, the work needs to be completed to a satisfactory standard **or** that appropriate time and/or effort has been spent.
- Ask the contributor if they are able to do it and if they need any support to complete it (e.g. give the information verbally rather than in written format).
- If unsatisfactory work is repeated another time or other changes are not made ask the contributor if they would rather not be asked to do this type of activity.

Please contact [Rachel.Taylor@ouh.nhs.uk](mailto:Rachel.Taylor@ouh.nhs.uk) or [Angeli.vaid@ouh.nhs.uk](mailto:Angeli.vaid@ouh.nhs.uk) if you need support.

More detailed guidance on many of these areas is available on the [Oxford PPI Researcher Guidance](#).

### Contacts:

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Please add relevant logo and  
keep/take off the NIHR OBRC logo  
as appropriate

November 2023, Oxford PPI Staff Group. Contact: [Rachel.Taylor@ouh.nhs.uk](mailto:Rachel.Taylor@ouh.nhs.uk)