

# Lincolnshire East Clinical Commissioning Group

## Patient Participation Toolkit

### Guidance for new and existing Patient Participation Groups



Lincolnshire East Clinical Commissioning Group  
 Patient Participation Toolkit  
 Guidance for new and existing Patient Participation Groups  
**Version Control**

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| 1       | Dec 14 Version         |   | Dec14        | Arden GEM CSU on behalf of Lincolnshire East Clinical Commissioning Group |
| 2       | Updated                | Re-formatted & added: <ul style="list-style-type: none"> <li>• Updated information on the CCG, Patient Council &amp; Virtual Patient Council</li> <li>• PPG Chairperson Role</li> <li>• Meeting Etiquette Rules</li> <li>• PPG Confidentiality and Data Protection Agreement</li> <li>• Poster template to recruit new members to the PPGs</li> <li>• Example terms of reference</li> <li>• Example Agenda</li> <li>• Example minutes template</li> <li>• PPG best practice examples</li> </ul> | October 2017 | Claire Hornsby, Engagement Manager  |

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## Introduction

Welcome to the NHS Lincolnshire East Clinical Commissioning Group (CCG) Patient Participation Group (PPG) toolkit. This guide aims to offer practical advice on starting up, or maintaining, a successful Patient Participation Group (PPG). It also contains information about Lincolnshire East Clinical Commissioning Group (LECCG), our Patient Council and other ways people can get involved.

***A PPG is a group of volunteer patients registered with a practice within primary care, who have no medical training but have an interest in the provision of local health services.***

**Each PPG is different and reflects its own unique practice population. This toolkit is intended as a guide only and should be adapted to suit the needs and ideas of local groups.**

Since April 2016, it has been a contractual requirement for practices in England to have a PPG, and to make reasonable effort that the group is representative of the practice population. (Guidance for GMS contract 2015/16)

## Section 1: About your Clinical Commissioning Group

**What is a CCG?** There are over 200 CCGs in England, NHS organisations that bring together local GPs and health professionals to plan, buy and monitor the quality of health services locally.

The practices that form Lincolnshire East Clinical Commissioning Group (CCG) are working together to improve the quality and delivery of health services for patients.

We are made up of three localities - Boston Area, East Lindsey, Skegness and Coast, all with very different challenges.

These include areas of socio-economic deprivation, people growing older and living longer, high numbers of obese people and people living with long term conditions like diabetes and Chronic Obstructive Pulmonary Disease (COPD).

It's our job to understand the health needs of local people to invest in services that will give you, our patients, better healthcare.

Because local GPs and health professionals are responsible for planning and buying the health services *now we're closer* to patients than ever before.

### **Lincolnshire East CCG's vision**

“We have a vision of a CCG where clinicians are working together to improve the quality and cost effectiveness of care, with resources based on need, and which benefits all of our patients as fairly as possible.”

### **Lincolnshire East CCG's mission**

“To ensure the optimum health and wellbeing of the people we serve by commissioning high quality health services which support choice; promoting healthy lifestyles and personal responsibility; reducing inequalities in opportunity, experience and health outcomes”

### **Meet Brenda...**

“Brenda is the CCG's Lay Member for patient and public involvement and is responsible for bringing the 'voice of the public' to the CCG's Governing Body.

“We need local people to work with to help promote the best health services possible for East Lincolnshire. I would encourage you to sign up to your local PPG.”

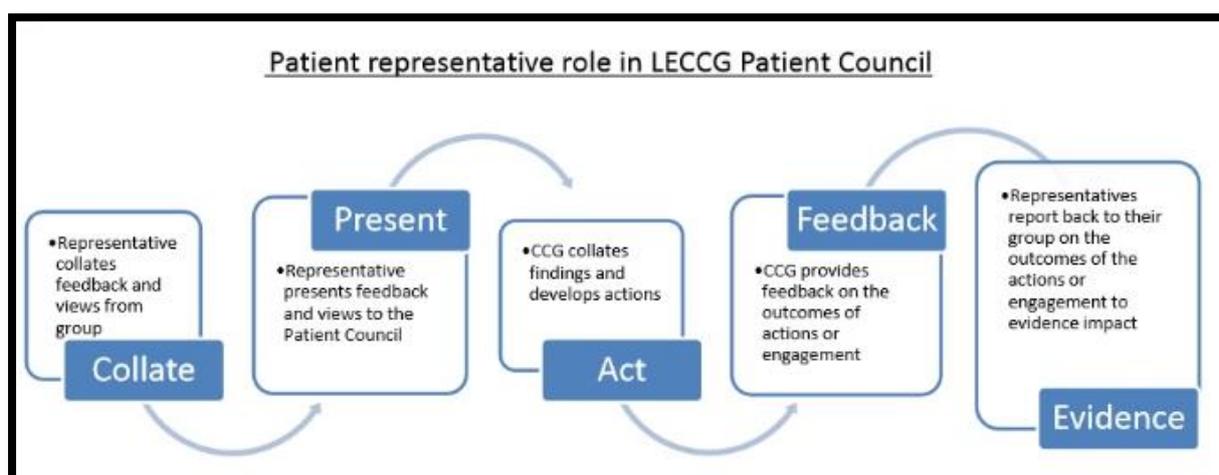


## The role Patient Participation Groups play in the LECCG's Patient Council

Lincolnshire East Clinical Commissioning Group's (LECCG's) Patient Council is established as part of the governance arrangements of the CCG, and is a sub-committee of the Quality and patient Experience Committee which feeds into the CCG's Governing Body.

The Patient Council exists to provide assurance and scrutiny in relation to the CCG's plans. Membership includes Patient Participation Group (PPG) representatives from Lincolnshire East CCG member practices, who attend to represent the views of patients and the public. The purpose of the patient council is to ensure the population served by the CCG have a voice in the planning and delivery of health services.

As you will see from the below flow diagram, PPG representatives who sit on the CCG's Patient Council gather feedback, opinions and views from local patients and healthcare service users and present this back to the Patient council meetings on behalf of patients registered at the CCG's member practices. Using the feedback form in **Appendix 1** assists representatives to record the information throughout the process and encourage two way communication between the CCG and patients.



### Virtual Patient Council (VPC)

In addition to the Patient Council, the CCG welcomes feedback on the topics discussed at the Patient Council meetings, via the **Virtual Patient Council**, and the minutes of meetings which can be accessed here:

<https://lincolnshireeastccg.nhs.uk/get-involved/join-the-virtual-patient-council>

The Virtual Patient Council is open to all patients and members of the public, who are welcome to comment on the Patient Council meetings, or ask questions about the CCG or wider NHS, via the following contact links, which are published on the VPC: **Email:** [public.engagement@lincolnshireeastccg.nhs.uk](mailto:public.engagement@lincolnshireeastccg.nhs.uk)

**Tel:** 01522 515305

## Section 2: Patient Participation Groups

### What is a PPG?

A PPG is a group of volunteer patients registered with a primary care practice who have no medical training but have an interest in the provision of local health services. PPGs are independent groups who take an interest in their local practice and health services in general.

### What is the purpose of a PPG?

- To give patients the opportunity to provide feedback to the practice
- To represent the views of patients
- To provide a confidential space for all patients to voice their concerns
- To encourage activities and events within the practice
- To develop projects that help other patients, such as befriending, help with transport and bereavement support
- To gather feedback on health services in the area
- To help patients understand the challenges faced in general practice

**“A PPG is a group of people who work with their practices to provide practical support, to help patients to take more responsibility for their own health, and to provide strategic input and advice. They are based on cooperation between the practice staff and patients. They help to improve communication and engagement.”**

***National Association of Patient Participation (NAPP)***

### The Role of a PPG

#### What can a PPG do?

#### 1. Help the practice to improve services:

- Provide patient feedback to the practice
- Improve practice facilities and the experiences of patients
- Carry out surveys to understand patients' views

#### 2. Offer support to other patients, including:

- Offer bereavement support
- Set up carers groups
- Set up volunteer transport schemes for medical appointments

#### 3. Provide information:

- Produce patient newsletters for the practice
- Make sure information and advice is user friendly (e.g. by providing feedback on leaflets and other materials)

#### 4. Arrange special health events:

- Arrange for training in basic first aid for patients
- Raise awareness around particular issues or illnesses
- Awareness for particular cultural groups around issues that relate to them

| <b>The Role of a PPG</b> |   |
|--------------------------|---|
| <b>PPG is not:</b>       |   |
| <b>X</b>                 | <b>A forum for complaints</b>                                     |
| <b>X</b>                 | <b>A vehicle for people to resolved their own personal issues</b> |
| <b>X</b>                 | <b>A doctor's fan club</b>  |

**What are the benefits of a PPG?**

| <b>Good for the patients because:</b>   | <b>Good for the practice because:</b>   | <b>Good for the community because:</b>  |
|---|---|---|
| <ul style="list-style-type: none"> <li>✓ Patients can take an active role in their own health</li> <li>✓ Patients will have a better understanding of how the practice works</li> <li>✓ Patients can be informed about what is happening in the practice</li> <li>✓ Patients will be able to influence what is happening in the practice</li> <li>✓ Patients will have a forum to discuss and feedback on wider issues with health services in the area</li> <li>✓ Patients will have a forum to suggest positive ideas and voice concerns</li> </ul> | <ul style="list-style-type: none"> <li>✓ Practice staff can listen to patients views</li> <li>✓ They will be able to get help from patients for projects and events</li> <li>✓ They will form a relationship with their patients</li> <li>✓ PPGs can take an active role in informing the whole patient population about what is happening in the practice</li> </ul> | <ul style="list-style-type: none"> <li>✓ Patients will have a group that represents them</li> <li>✓ Patients will be more informed about what is happening in the practice</li> <li>✓ Patients will have an opportunity to become involved in community projects</li> </ul> |

| <b>Step-by-step guide for setting up a PPG</b> |   |
|--|---|
| <b>Step 1<br/>Getting Started</b>              | <p><b>The idea to start a group can come from:</b></p> <ul style="list-style-type: none"> <li>✓ A practice manager or other member of practice staff</li> <li>✓ A patient or a group of patients</li> </ul> <p><b>What to do next:</b></p> <ul style="list-style-type: none"> <li>✓ Approach the practice manager/partners</li> <li>✓ Talk to other PPG Groups</li> <li>✓ Talk to your CCG</li> <li>✓ Start recruiting members to your first meeting</li> </ul> <p><b>To start off with the PPG might consist of just a few patients and a member of the practice staff. Members of the clinical team can attend the meetings, either as a regular attender or as and when requested. The PPG should meet at least 4 times a year.</b></p>  |
| <b>Step 2<br/>Recruiting to your group</b>     | <p><b>There are two main ways of recruiting members to your group:</b></p> <ul style="list-style-type: none"> <li>✓ Open groups can be launched from open meetings, which any patient can attend. You will need to advertise widely giving plenty of notice. It may also help to offer an incentive to come along, such as tea and coffee or a talk on an issue people may be interested in.</li> <li>✓ Invited groups are formed by contacting individual patients directly who are known to the practice and staff. Practice staff and doctors may be able to help to identify patients who might be interested in joining a PPG</li> </ul> <p><b>Try to ensure that the membership of the PPG is representative of the practice's patient population.</b></p> <p>It is a common view that PPGs are not always representative of the practice population. As you will be aware, some people do not have the time to attend meetings. There are, however, ways you can ensure that there is a wider patient voice, some tips include:</p> <ol style="list-style-type: none"> <li>1. Being proactive &amp; seeking the wider voice in your local community</li> <li>2. Targeting community groups that you know may be under represented in you PPG meetings</li> <li>3. Being prepared that not everyone will be able to attend all meetings, and inviting some representatives to attend for a certain purpose, or as a one off.</li> </ol> <p><b>It is possible to have a group which is a mix of open and invited representatives. You can use the invited approach to get things started, and then do some open recruiting as well</b></p> |

| Step-by-step guide for setting up a PPG |   |
|---|---|
|   | <p><i>Appendix 2</i> has a suggested flyer/poster for recruitment to the PPG</p> <p><i>Appendix 9</i> has a suggested template for a PPG Confidentiality and Data Protection Agreement that you can ask members to sign.</p>  |
| <b>Step 3<br/>The First Meeting</b>     | <ul style="list-style-type: none"> <li>✓ The first meeting should help people decide if this is something that they wish to commit to</li> <li>✓ Be clear about the why the group is formed and what the expectations of members are, establish Ground Rules</li> <li>✓ Set an agenda for the meeting to keep you on track</li> <li>✓ Establish what everyone would like to get from their PPG</li> <li>✓ Decide how you would like your PPG meetings to run and how often</li> <li>✓ Discuss ideas and talk about skills that members can bring to the group</li> <li>✓ In the first couple of meetings PPG members should elect a <b>Patient Chair</b>; this will empower the group to share their views and will encourage co-production between the patients and the practice</li> <li>✓ Agree how the meetings will be documented</li> <li>✓ <b>Agree a date, time and venue for the second meeting, and try to make this within 4 weeks - it's important to keep the momentum going.</b></li> </ul> <p><i>Appendix 3</i> has a suggested template for a first meeting agenda</p> <p><i>Appendix 4</i> has a suggested template for notes template. Someone will need to volunteer to take some notes or action points from the meetings, or members could take this in turns.</p> <p><i>Appendix 5</i> is a template for PPG Chairperson Role Personal skills and qualities.</p> <p><i>Appendix 6</i> has a suggested template for Meeting Etiquette &amp; Ground Rules</p> |
| <b>Step 4<br/>The Second Meeting</b>    | <p><b>The checklist below should help as a guide:</b></p> <ul style="list-style-type: none"> <li>✓ Set an agenda for the meeting to keep you on track</li> <li>✓ Establish who will act as Chair and Deputy Chair</li> <li>✓ Identify a Secretary responsible for taking minutes, or use a rota system</li> <li>✓ You will need a Treasurer if you are going to fundraise (Please note: you don't need to do this and not all groups</li> </ul>   |

| Step-by-step guide for setting up a PPG          |  |
|--|--|
|  | <p>do)</p> <ul style="list-style-type: none"> <li>✓ Terms of reference need to be developed and agreed over the first few meetings. These should be agreed with the practice and set out what the group exists to do and how it will run, allowing participants to get a clear understanding of what the PPG would like to achieve</li> <li>✓ Decide on the timing, frequency and venue of meetings</li> <li>✓ Make plans to review these arrangements</li> <li>✓ Consider establishing a <b>virtual group</b> - not all people can or want to attend formal meetings</li> </ul> <p><i>Appendix 7 has a suggested template for Terms of reference</i></p>  |
| <b>Step 5</b><br><b>Keeping your group going</b> | <ul style="list-style-type: none"> <li>✓ Planning ahead for your group can be a challenging task but it is important to keep members focused if the group is to be successful</li> <li>✓ Have a work plan that sets out what projects you want to undertake over the coming year – this may be surveys, awareness raising or something else</li> <li>✓ Make sure that work is shared amongst the group</li> <li>✓ Make your group open to a wide range of viewpoints</li> <li>✓ Keep the practice manager and the practice staff involved</li> <li>✓ Refresh the group and recruit new members when you can, think of recruiting people that represent your practice population.</li> <li>✓ Organise training where you can for those undertaking specific roles such as chairing or minute taking</li> <li>✓ Talk to other PPGs to find out what they are doing and share ideas and what has worked well for your PPG</li> <li>✓ Share information that the CCG's engagement team send to you to keep members informed of wider healthcare projects</li> <li>✓ Inform the CCG of the work the PPG are doing and what Patients are saying about local services</li> <li>✓ Talk to the CCG's engagement team about health campaigns you can get involved in – email <a href="mailto:public.engagement@lincolnshireeastccg.nhs.uk">public.engagement@lincolnshireeastccg.nhs.uk</a> or ring 01522 515305</li> <li>✓</li> </ul> |
| <b>Step 6</b><br><b>Reporting back</b>           | <ul style="list-style-type: none"> <li>✓ Keep people informed of the work the group is undertaking – this includes the practice staff, patients, the CCG and Healtwatch.</li> <li>✓ Consider setting up a PPG noticeboard in the waiting room</li> <li>✓ A newsletter can be produced to keep people informed about what you are doing</li> <li>✓ If the practice has a website you can talk to the practice</li> </ul>  |

### Step-by-step guide for setting up a PPG

|  |   |
|--|---|
|  | <p>manager about a PPG page</p> <ul style="list-style-type: none"> <li>✓ Talk to the CCG's engagement team to get help publicising your activities</li> </ul> |
|--|---|

### What is a Virtual Patient Participation Group?

This is a group that can be set up for patients who would like to be involved in a PPG but are unable to attend meetings.

Emails can be sent out asking for members opinions on a range of topics. It is important to send members a Data Protection Statement telling them how their personal data will be used.

**Appendix 9** has a suggested template for a PPG Confidentiality and Data Protection Agreement; this can be used for Virtual PPGs as well as for meetings that meet in person.

### Five reasons why groups fail

| Fail                                       | Pass   |
|--|--|
| ✗ Lack of focus and commitment             | ✓ An informed and supportive practice manager                              |
| ✗ Poor Planning                            | ✓ Committed practice staff   |
| ✗ Poor communication to and from the group | ✓ A strong patient voice   |
| ✗ Relying too heavily on one or two people | ✓ A group comprised from a wide range of representatives from the practice |
| ✗ Poor ground rules                        | ✓ Clear direction and objectives   |

## **We asked members from PPGs for their top tips on what makes their PPG work well within Lincolnshire East.....**

### **Old Leake Medical Centre PPG**

- ✓ The relationship between practice and PPG works very well at Old Leake. The PPG has been able to act as a 'buffer' for the practice during recent building alterations, answering patients queries and hopefully minimising direct contact to the practice.
- ✓ Although most of the group members fall in the same age bracket, they come from different areas of the community, and have a wealth of local knowledge; so represent the area very well.
- ✓ The group has a terms of reference which is displayed in the medical centre waiting room on the PPG notice board.
- ✓ Each meeting has a set agenda. Items to be included are submitted to the practice. The agenda is collated and sent to each member prior to the meeting.
- ✓ Members of the PPG are encouraged to attend every meeting. Our practice manager and/or their deputy is in attendance together with the dispensary manager and a member of staff to take minutes.
- ✓ On numerous occasions we have guests from the community (local councillors, representatives from medical charities or NHS departments etc.). Guest speakers are welcomed to the meetings and have included representatives for the CCG, local charities and patient support groups in the area.
- ✓ We have an active virtual group & any comments or concerns raised by them are discussed at the PPG meeting.
- ✓ Recruiting new members is difficult as people find it hard to commit time on a regular basis. Posters and screen advertising in the medical centre waiting room are quite effective. Existing members of the group have introduced prospective new recruits. They are usually invited to meet the group, see how we work and ask questions.
- ✓ The friend & family surveys are used in the centre. These are collated and the questions/ suggestions/ complaints discussed at the PPG meetings. If follow up is required, a suitable member of the team (either PPG or staff member) is nominated and the outcome discussed at the next meeting.
- ✓ Educational evenings used to be arranged 3 times a year by the practice & PPG. Topics of the events were usually decided by the areas showing most concern to the patients at that time. Areas covered have been skin, prostate & breast cancer, mobility issues and welfare problems. We hope to resume these events later in 2018.

**Sally Martin, Vice Chair, Old Leake Medical Centre PPG**

### **Tasburgh Lodge. Woodhall Spa**

- ✓ The PPG have a Terms of Reference which is on the website.
- ✓ The practice also publish our PPG minutes on the website. Currently, the PPG minutes are done by a member of staff but this is about to change.
- ✓ We invite visiting speakers to our meetings, for example we have had Age UK for befriending service Everyone to discuss the Carers Award, and one of our PPG members attended their training session.
- ✓ The practice manager and or deputy attend the meetings and mostly one GP. Practice updates are vital for the understanding of how things work also a two way communication between members and management
- ✓ There is a PPG notice board in the waiting room to promote the PPG
- ✓ As chair person, I have regular meetings with the Practice manager and raise any concerns that are passed on to me.
- ✓ I attend the CCG's Patient Council meeting and forward notices sent to me by the Patient Council to the PPG.
- ✓ Last year we gained new members by being involved with PPG awareness week and intend doing the same this year by advertising and having an open afternoon with tea in a nearby Hall.
- ✓ The PPG oversaw the fundraising for an ECG machine and patient transport was instigated through us.
- ✓ It is proposed that we have a joint meeting with the leads of James St and Kidgate Practices sometime soon.

**Jean Hill, Chair Person Tasburgh Lodge, Woodhall Spa.**

### **Liquorpond PPG**

- ✓ PPG what works well in our PPG? business done, attendance at meetings up, lots of people are involved in discussion & the Practice replies to requests.
- ✓ The PPG have a terms of reference and a set agenda for each meeting.
- ✓ The attendance at the PPG includes, patients on the PPG, Practice Manager & some practice staff including the Technician, one or more GPs, and at least one Partner.
- ✓ We don't have a Virtual PPG Group as we feel it is better to have face to face discussions.
- ✓ For future meetings, we will ask the Practice Manager to invite representatives from Healthwatch to go through the main points of their inspection that took place earlier this year.
- ✓ The PPG are involved in supporting the practice with surveys.

**Peter Dorr – PPG Chair, Liquorpond PPG**

**New Coningsby Surgery**

- ✓ What works really well in our PPG is the that the communication with the practice manager and the PPG is good, this is very helpful
- ✓ The PPG have a terms of reference which is reviewed as necessary.
- ✓ The PPG have a set agenda which is varied if needed.
- ✓ Our PPG membership includes patient members of the PPG, there is also a short period at the beginning of our meetings for members of public, and occasional attendees.
- ✓ We do not currently have a virtual group however we did have one virtual member previously
- ✓ The PPG have guest speakers at meetings, we have had speakers on occasions from Health Watch, St Barnabas
- ✓ We recruit new members at our at the practice’s Annual General Meeting, and also encourage people to make enquiries about the PPG in the practice.
- ✓ We involve other practice patients and seek their feedback thorough undertaking patient surveys in conjunction with the Surgery
- ✓ The PPG have supported campaigns in the practice ie Flu Clinics, Do not attend campaign the Pharmacy campaign.

**Anita Pearson, New Coningsby Surgery PPG**

**PPGs making a difference in your area – Merton Lodge Surgery**

At Merton Lodge Surgery our achievements include:

- ✓ Essential members have a chair who is prepared to attend as many alternative presentations as possible, which may be of interest to the majority of patients. (Appreciate that it is impossible to attend every venue.)
- ✓ The PPG try and get as many presentations by CCG or other NHS staff organised for PPG meetings. This increases interest at local level, and can help in understanding the difficulties and complex issues faced by NHS on a daily basis.

**Peter Hawkyard, Chair of Merton Lodge Surgery**

**Spilsby PPG**

- ✓ Our PPG has Terms of Reference which are reviewed
- ✓ We have a set Agenda for meetings
- ✓ Meetings take place at the Surgery monthly, excluding August and December
- ✓ Committee Members and the Practice Manager attend Meetings
- ✓ Formal Minutes are taken and published on the Surgery website
- ✓ The Annual General meeting, usually held in October, is open to all patients of the Surgery and is attended by the Practice Manager and at least one of the GP Partners. There is an open forum for questions
- ✓ Committee members are recruited through Terms of Reference protocols, vacancies being advertised on Surgery website, Surgery PPG notice board, in local magazines and press and at “events”
- ✓ We also have a Virtual Group of approximately 100 members
- ✓ We support two Flu Clinics per year which are held in the Franklin Hall. This

- gives us the opportunity to promote the PPG and get feedback from patients
- ✓ We publish a Newsletter approximately 4 times a year, which is available on the website, in the Surgery, local library and at the Flu Clinics or other “events”
  - ✓ We “post” a monthly message from the PPG in 3 local magazines which includes DNA figures, “event” or promotional information and Committee and Virtual Member recruitment information
  - ✓ We supported PPG week in 2017 and 2018 and promote LECCG, NHS, LCC and other health and welfare initiatives which are aimed at improving patient health and wellbeing
  - ✓ A member of the PPG attends the LECCG Patient Council Meeting
  - ✓ We have met with our local MP and County Council representatives to gather support for local NHS and Surgery issues

**Christina Holmes Vice Chair Spilsby PPG**

**Other Way to Get Involved**

There are lots of ways you can get involved in health and social care in your area.

NHS Lincolnshire East Clinical Commissioning Group (CCG) is committed to involving patients, the public, partners and key stakeholders in the development of future services, identifying priorities and understanding the needs of our population. We aim to improve local health services and respond to the health needs of everyone in the area by ensuring patients and the public are at the heart of decision making. Some of the ways you can get involved are listed below:

**JOIN**

- ✓ **A Patient Participation Group (PPG)** – one of the best ways to have your say about local health services is to join your surgery's PPG
- ✓ **The Lincolnshire East CCG’s Viewpoint Panel** – the Viewpoint Panel is a database of local people who are interested in having a say in how health services are developed and delivered
- ✓ **The Lincolnshire East CCG’s Readers Panel** – the Readers Panel is a database of local people who read and make comments or suggestions on the language and layout of documents such as patient information leaflets.
- ✓ **Join a local health trust membership scheme** to help shape services in your area, contact details are below:
  - **United Lincolnshire Hospitals NHS Trust**  
Email: [Members@ulh.nhs.uk](mailto:Members@ulh.nhs.uk) Tel: 01522 572301
  - **Lincolnshire Partnership NHS Foundation Trust**  
Email: [info@lpft.nhs.uk](mailto:info@lpft.nhs.uk) Tel: 01522 572301
  - **Lincolnshire Community Health Services NHS Trust (LCHS)**  
Email: [membership@lincs-chs.nhs.uk](mailto:membership@lincs-chs.nhs.uk) Tel: 01522 308857

## GO TO

- ✓ **An event** - keep an eye on <https://lincolnshireeastccg.nhs.uk/news-events/events> to find out what events are happening and meet other people who want to make a difference

## GET INVOLVED ONLINE:

- ✓ **Follow us on Twitter: @NHSLincsEast**
- ✓ **Follow us Facebook:** Lincolnshire East Clinical Commissioning Group
- ✓ **Get involved via the Virtual Patient Council**, where the CCG welcomes feedback on the topics discussed at the Patient Council meetings, and if you have any comments or questions. The Virtual Patient Council can be accessed here: <https://lincolnshireeastccg.nhs.uk/get-involved/join-the-virtual-patient-council>
- ✓ **Care Opinion** - This is about honest and meaningful conversations between patients and health services, to help make health services better. Go to <https://www.careopinion.org.uk/>
- ✓ **NHS Choices website** - your one-stop shop on conditions, treatments, local services and healthy living. Go to [www.nhs.uk](http://www.nhs.uk)

## Useful links and contacts

Further support and advice on PPGs and on patient and public involvement can be found at:

### **Lincolnshire East Clinical Commissioning Group**

Engagement Manager

Email: [Public.Engagement@LincolnshireEastCCG.nhs.uk](mailto:Public.Engagement@LincolnshireEastCCG.nhs.uk)

Tel: 01522 515305

Website: <http://lincolnshireeastccg.nhs.uk/get-involved>

### **National Association of Patient Participation (N.A.P.P.)**

Established in 1978, N.A.P.P. is uniquely placed as the only UK umbrella organisation for patient-led groups in general practice. They provide essential support to GPs and practice teams through a comprehensive range of evidence-based high quality specialist resources developed from over thirty years experience and formation of hundreds of Patient Participation Groups

Tel: 01932 242350

Website: [www.napp.org.uk](http://www.napp.org.uk)

### **Healthwatch Lincolnshire**

01205 820 892

[info@healthwatchlincolnshire.co.uk](mailto:info@healthwatchlincolnshire.co.uk)

**Appendix 1**

**Lincolnshire East Clinical Commissioning Group  
Patient Council feedback form**

|  |  |
|--|--|
| <b>Patient Council meeting date:</b>             |  |
| <b>Group Name</b>                                |  |
| <b>Group meeting and date feedback received</b>  |  |
| <b>Representative feeding back</b>               |  |
| <b>Group feedback themes for Patient Council</b> | <ul style="list-style-type: none"> <li>• .</li> </ul>              |
| <b>Patient Council response</b>                  | <ul style="list-style-type: none"> <li>• .</li> </ul> |
| <b>CCG feedback at Patient Council</b>           |  |
| <b>Feedback to group meeting and date</b>        |  |

**Appendix 2** Suggested flyer/poster for recruitment to the PPG

*Add Logo*

XXXXX Add Name of Practice

# Join our Patient Participation Group (PPG)

**Are you interested in finding out more about the practice?**

**Would you like to influence the development of health services locally?**

If the answer is **YES**, have you ever thought about joining the XXXX PPG?

XXXX PPG is actively seeking patients to join our meetings. We are keen to hear from people of all backgrounds, ages and gender, to attend our regular (state frequency) meetings.

The PPG is run by volunteer patients, and practice staff to help strengthen the relationship between the practice and you, their patients. The PPG contributes ideas feedback and suggestions to the practice to improve the patient experience

If this is something you may be interested in, or would like more information, please contact: XXXX via email [acbd@xyz.com](mailto:acbd@xyz.com) or telephone XXXXX

**Appendix 3 Suggested template for a first meeting agenda**

**Name of Practice PPG Meeting**

**Date:xxxxx**

**Time: From xxxx To:xxxxx**

**Venue:xxxxx**

| Agenda Item  | Lead | Information/<br>Discussion/<br>Action | Time<br>Allocation |
|--|------|---------------------------------------|--------------------|
| <b>1 Welcome &amp; Introductions</b>   |      |                                       |                    |
| <b>2. Ground rules.</b> <ul style="list-style-type: none"> <li>Refer to Suggested template for Meeting Etiquette &amp; Ground Rules – <b>appendix 6</b></li> </ul>   |      |                                       |                    |
| <b>3. Aims &amp; Objectives of the PPG</b> <ul style="list-style-type: none"> <li>Consider terms of reference – <b>appendix 7</b></li> </ul>   |      |                                       |                    |
| <b>4. Practice Update</b> <ul style="list-style-type: none"> <li>Update from the practice staff member attending the meeting</li> </ul>  |      |                                       |                    |
| <b>5. Election of PPG meeting Chair</b> <ul style="list-style-type: none"> <li>You will need to identify an interim Chair to get going, perhaps for 6-12 months</li> <li>This could be done via a vote, or numerous representatives could rotate</li> </ul>  |      |                                       |                    |
| <b>6. Minutes of the meetings</b> <ul style="list-style-type: none"> <li>Discuss how the meetings will be documented</li> <li>The PPG may wish to have a nominated secretary to take the notes of the meeting, as this will help structure the PPG meetings and it's activities. Alternatively, this role could rotate amongst the PPG members.</li> </ul> |      |                                       |                    |
| <b>6. Actions required for the next meeting</b> <ul style="list-style-type: none"> <li>Discuss the actions required for the next meeting and who will do what.</li> </ul>  |      |                                       |                    |
| <b>7. Any Other Business</b>   |      |                                       |                    |
| <b>8. Date and time of the next meeting</b> <ul style="list-style-type: none"> <li>To be discussed if this has not been pre-arranged</li> </ul>  |      |                                       |                    |

**Appendix 4 Suggested template for PPG meeting notes**

**Note takers are responsible for:**

1. Supporting the chair and helping the meeting to run smoothly
2. Taking notes at the meeting, including all of the action points agreed
3. Circulating the notes to attendees after the meeting
4. The notes should be shared using the agreed method of communication e.g. over email or via post

**Minutes of the Name of Practice PPG Meeting**

**Date:xxxxx Time: From xxxx To:xxxxx**

**Venue:xxxxx**

| <b>Present:</b>       |  |
|-----------------------|--|
| XXXXXXXXX             | XXXXX <b>Meeting Chair</b>   |
| Practice Staff Member | Job Title  |
| Name of PPG Rep       | PPG Representative   |
| Name of PPG Rep       | PPG Representative   |
| Name of PPG Rep       | PPG Representative   |
| Name of PPG Rep       | PPG Representative   |
|                       |  |
|                       |  |
|                       |  |
| <b>Apologies:</b>     |  |
|                       |  |
|                       |  |
|                       |  |
| <b>1.1</b>            | <b>Apologies</b>   |
|                       | Apologies were noted as above.   |
| <b>1.2</b>            | <b>Introduction</b>  |
|                       |  |
| <b>1.3</b>            | <b>Minutes of the last meeting (Date)</b>  |
|                       | The minutes of the last meeting were approved as an accurate record/ The following changes were identified for the minutes: <ul style="list-style-type: none"> <li>• A</li> <li>• B</li> <li>• C</li> </ul>  |
| <b>1.4</b>            | <b>Action log</b>  |
|                       | Chair went through the action log of the last meeting held on <span style="color: red;">__Add date__</span> , and the appropriate person updated on the actions as below.<br><br><div style="color: red; padding-left: 40px;"> <b>Action Ref: Subject title – (KEEP ACTIONS IN RED SO THEY STAND OUT)</b><br/> <b>Action Ref: Subject title -</b><br/> <b>Action Ref: Subject title -</b><br/> <b>Action Ref: Subject title -</b> </div> |

|           |   |
|-----------|---|
| <b>2.</b> | <b>Section 2: title – see agenda</b>                      |
|           | Action agreed ref (KEEP ACTIONS IN RED SO THEY STAND OUT) |
| <b>4</b>  | <b>Section 3: title – see agenda</b>                      |
|           | Action agreed ref (KEEP ACTIONS IN RED SO THEY STAND OUT) |
| <b>5</b>  | <b>Section 4: title – see agenda</b>                      |
|           | Action agreed ref (KEEP ACTIONS IN RED SO THEY STAND OUT) |
| <b>6</b>  | <b>Any other business</b>                                 |
|           | Action agreed ref (KEEP ACTIONS IN RED SO THEY STAND OUT) |
| <b>7</b>  | <b>Date, Time &amp; venue of the next meeting</b>         |
|           | DD/MM/YYYY at XXXXXXXX add the address and post code      |

## **Appendix 5 PPG Chairperson Role Personal skills and qualities**

**Role:** The PPG Chairperson has a strategic role to ensure the purpose of the PPG meetings is met, by making sure that:

1. The PPG meetings comply to the terms of reference with good meeting etiquette, so that matters can be dealt with efficiently
2. There is full participation at PPG meetings
3. Ground Rules are followed, including that the PPG meetings should not be seen as a complaint platform
4. As per the Confidentiality rules, no personal issues should be discussed
5. PPG meeting actions are carried out and are followed up
6. The chair, or an allocated representative work with the relevant practice staff to create an agenda for each meeting
7. The chair, or an allocated representative work with the relevant practice staff and PPG representatives to review PPG documents to ensure accuracy (e.g. meeting minutes), and that any documents appropriately reflect the work of the PPG.
8. There is a strong relationship with the CCG, including sharing Patient Council discussions , sharing information or informing the CCG of topics of discussion via the Patient Council or Virtual Patient Council

### **Personal skills, qualities, experience:**

1. Approachable and interested in all in members' views
2. Good leadership, communication and interpersonal skills
3. Diplomatic and sensitive to the feelings of all PPG members, practice staff & members of the public
4. Objective and fair
5. Good meeting management skill, including time keeping
6. Able to delegate to other members of the PPG
7. Good level of understanding of healthcare
8. Experience of people management

*Appendix 7* Suggested template for Terms of reference

# **XXXXXX Practice**

## **PATIENT PARTICIPATION GROUP (PPG)**

### **Terms of Reference**

Revised: MM/YYYY

Review Date: MM/YYYY

#### **1. Introduction**

- 1.1 **xxxxxx practice** PPG consists of a group of volunteers who are registered at the practice, and who have put themselves forward to work with the practice to improve and enhance services to all registered patients.

#### **2. Purpose**

2.1 The purpose of the PPG is to:

- Strengthen the power of the patient voice to ensure that decisions made by the practice are patient centred
- Support and strengthen the relationship between the Practice and their patients.
- To support the practice and act as a critical friend
- To support patients to better understand the challenges faced in general practice and wider NHS

#### **3. Objectives**

3.1 The Group will:

- Support communication from the practice to patients and the wider population, and vice versa
- Support the practice by helping to communicate health services changes and wider health messages to patients of the practice, for example by encouraging and running activities that promote preventative health care and health education.
- Provide the practice with representative patient feedback on patient needs, concerns and interests to support the continual improvement of services.
- Support the practice in producing communications materials for patients and offer feedback on patient information.
- Assist and support the practice by arranging voluntary groups/support within the community.
- Work with other PPGs to share good practice and work together on projects.
- Gather feedback on wider health and social care issues and feed these into the Lincolnshire East CCG via the Patient Council or the Virtual Patient Council which can be accessed here: <https://lincolnshireeastccg.nhs.uk/get-involved/join-the-virtual-patient-council>

- Work with the Practice to improve the up-take of health messaging, for example, self-care campaign, stop smoking, raising of awareness of vaccination programmes
- Empower practice patients to make better choices to self-care, and appropriately access urgent care and emergency NHS services
- Support the NHS to reduce waste of resources e.g. support a Did Not Attend appointments or a reduce waste medicines campaign.
- Influence the provision of secondary healthcare locally by feedback of the PPG and wider patient views to the Lincolnshire East Clinical Commissioning Group.
- Support the practice during their Care Quality Commission(CQC) inspection process

#### **4. Review & Monitoring**

- 4.1 The Terms of Reference will be reviewed annually by the PPG, unless otherwise determined necessary by the practice.

**Date of next review: MM/YYYY**

#### **5. Membership to the PPG**

- 5.1. Membership is set out as follows:

- Members of the PPG must be registered patients of XXXX practice.
- Given the voluntary nature of the PPG, the Practice will make reasonable effort to ensure that its PPG membership reflects the practice population.
- There will be a campaign to recruit volunteer members, who will be given an option to become full members of members of the virtual group. Virtual members can take part in online engagement surveys, and consultations.
- The PPG will consist of up to XX volunteers, and at least one member of the practice staff senior team.
- Patient need to inform the PPG secretary or nominated rep if they cannot attend a meeting or follow the agreed process.

#### **6. Frequency of Meetings**

- 6.1 The frequency and arrangement of meetings will be as follows:

- Meetings will be held quarterly/ bi-monthly/ monthly
- Notices about meetings will be displayed on the (add in how you will promote) PPG notice board, sent via email
- The PPG may appoint sub-committees to work with the practice on particular topics

#### **7. Quorum and Decision-Making**

- 7.1 Quorum and Decision-Making of the meetings will be as follows:

- At meetings, a quorum will consist of ?? (5) PPG members, and ?? member of practice staff.
- The PPG will aim wherever possible to reach decisions by consensus, however Where it is not possible to reach a consensus the view held by the majority of the PPG representatives present will be the view that is agreed

**Appendix 6** Suggested template for Meeting Etiquette & Ground Rules

|  |
|--|
| <b>This meeting is not a forum for individual complaints and single issues, and the PPG should not be seen as a complaint platform</b> |
| <b>As per confidentiality rules, no personal issues should be discussed</b>  |
| <b>All views are valid, everyone’s views must be listened to and respected</b>   |
| <b>No discrimination will be tolerated by the PPG</b>  |
| <b>The meeting will be an open, safe and honest environment.</b>   |
| <b>All members will be treated with respect and have a chance to air their views</b>   |
| <b>Members will respect each other, the practice, their staff members and confidentiality at all times</b>                             |
| <b>The group will commit to delivering results for the PPG</b>   |
| <b>Mobile phones will be switched off or put on silent to not disturb the meeting.</b>   |
| <b>The meeting will start and finish on time</b>   |
| <b>All members will stick to the agenda to be discussed.</b>   |

**The PPG will comply with the 7 Nolan Principles:**

Although voluntary, membership to the PPG is a responsible public position. Members will represent the voice of patients registered at a practice. The PPG is therefore governed by the 7 Nolan principles of public life, as identified below:

| <b>7 Nolan principles of public life</b> |  |
|--|--|
| <b>1.</b>                                | <b>Selflessness</b><br>Holders of public office should take decisions solely in terms of the public interest. They should not do so in order to gain financial or other material benefits for themselves, their family, or their friends |
| <b>2</b>                                 | <b>Integrity</b><br>Holders of public office should not place themselves under any financial or other obligation to outside individuals or organisations that might influence them in the performance of their official duties.          |

|   |   |
|---|---|
| 3 | <p><b>Objectivity</b><br/>         In carrying out public business, including making public appointments, awarding contracts, or recommending individuals for rewards and benefits, holders of public office should make choices on merit.</p>                            |
| 4 | <p><b>Accountability</b><br/>         Holders of public office are accountable for their decisions and actions to the public and must submit themselves to whatever scrutiny is appropriate to their office.</p>  |
| 5 | <p><b>Openness</b><br/>         Holders of public office should be as open as possible about all the decisions and actions that they take. They should give reasons for their decisions and restrict information only when the wider public interest clearly demands.</p> |
| 6 | <p><b>Honesty</b><br/>         Holders of public office have a duty to declare any private interests relating to their public duties and to take steps to resolve any conflicts arising in a way that protects the public interest.</p>                                   |
| 7 | <p><b>Leadership</b><br/>         Holders of public office should promote and support these principles by leadership and example.</p>   |

## **Appendix 9 Example: PPG Confidentiality and Data Protection Agreement**

### **(Insert name of practice) PPG Confidentiality and Data Protection Agreement**

This example Confidentiality and Data Protection Agreement covers:

1. **Section A - Data Protection Agreement** - the data protection of PPG members personal information
2. **Section B - Confidentiality Statement** - The handling of confidential information by PPG members, for example information discussed in meetings that is not in the public domain.

#### **Section A - Data Protection Agreement**

The Data Protection Act (1998) governs how personal information is used and everyone responsible for using personal information is required to follow strict rules, called 'data protection principles'. This ensures that personal information is:

- used fairly and lawfully
- used for limited, specifically stated purposes
- used in a way that is adequate, relevant and not excessive
- accurate
- kept for no longer than is absolutely necessary
- handled according to people's data protection rights
- kept safe and secure
- not transferred outside the European Economic Area without adequate protection

The **(Name of Practice)** holds and processes information on behalf of its members and will keep all information confidential and secure as described in the data protection principles above.

The **(Name of Practice)** PPG database will contain such information that is required to communicate with patients regarding PPG events and activities and distribution of newsletters and flyers.

- *The PPG database will contain information on those patients who have opted to be kept informed of such events and activities.*
- *The information on the PPG database will not be disclosed to any third party outside of the PPG committee members.*
- *The PPG database will not contain any patient medical information.*
- *A copy of the PPG Data Protection Statement will be added to (Name of Practice) web site.*

I hereby consent to the PPG holding and processing information about me solely for the purpose of the activities of the PPG.

| PPG Patient Representative | Practice Staff Member Name |
|----------------------------|----------------------------|
| Signed:                    | Signed:                    |
| Print Name:                | Print Name:                |
| Date:                      | Date:                      |

### Section B Confidentiality Statement

This Confidentiality Statement relates to information attained during a PPG representative's involvement with the (Name of Practice) PPG.

In the course of your duties you may acquire or have access to confidential information which should not be disclosed to any other person unless in the pursuit of your duties or with specific permission given on behalf of Name of Practice.

### Confidentiality Statement

During my involvement with the (Name of Practice) PPG of or at any time after its termination, no confidential information will be used or disclosed to any person outside the group. This includes information about the PPG / practice, and any third party dealings. I will endeavour to prevent any such disclosure and understand that disclosure of confidential information may result in the termination of my position within the PPG.

| PPG Patient Representative | Practice Staff Member Name |
|----------------------------|----------------------------|
| Signed:                    | Signed:                    |
| Print Name:                | Print Name:                |
| Date:                      | Date:                      |