# **How to effectively conduct Patient and Public Involvement and Engagement (PPIE) during and beyond the coronavirus pandemic.**

# **Hints and tips - a resource for staff, students and Public Contributors.**

# **Introduction:**

The Faculty of Biology, Medicine and Health (FBMH) widely considers Patient and Public Involvement and Engagement (PPIE) to be a core strength and places it in high regard. PPIE is fully embedded in our research and teaching which is shown by the importance of it in the [Faculty](http://documents.manchester.ac.uk/display.aspx?DocID=35221) and [University](http://www.engagement.manchester.ac.uk/resources/Public%20Engagement%20Strategy%20FINAL.pdf) strategies.

Due to the coronavirus pandemic our staff, students and Public Contributors have been required to conduct their PPIE activities online where possible. This resource provides useful hints and tips when involving and engaging with Public Contributors and the general public both during and beyond the coronavirus pandemic.

This resource has been co-produced by staff and Public Contributors and we would like to thank attendees of the Faculty’s PPIE Celebration event 2020 who developed the content for this resource, specifically; Ailsa, Moira, Georgina and Dee-Ann who facilitated the activity.

To view the activity visit: [H](http://documents.manchester.ac.uk/display.aspx?DocID=50020)ere

**The positives of online PPIE activities:**

Accessibility:

* PPIE activities have been able to **‘go global’** and involve and engage people from across the world. **Tip:** use social media to help promote your PPIE activity, it’s free and you can connect with a wider audience. The Social Responsibility and Public Engagement Team can also help promote events, training and involvement opportunities to their contacts via [Twitter](https://twitter.com/FBMH_SR) and the Faculty’s monthly [Public Engagement email digest](https://www.bmh.manchester.ac.uk/connect/social-responsibility/). Contact [srbmh@manchester.ac.uk](mailto:srbmh@manchester.ac.uk) for further information.
* There is **no travel time** which can be draining for some Public Contributors. Reducing travel is also **better for the environment**.
* PPIE activities are **more accessible to a wider audience** so long as attendees have the technology required. **Tip**: to further improve accessibility, ask attendees in advance if they have any additional requirements e.g. subtitles for videos, training on the software etc.
* A more **diverse audience** can be reached which may potentially lead to a wider level of involvement/engagement from a range of voices.

Networking and relationships:

* It may **make it easier** for people with mental health conditions, disabilities or special requirements to attend online PPIE activities without the pressures of having to attend them in person.
* There is the potential to **reduce the feeling of isolation** for some people as PPIE activities may be more accessible and easier to attend. Attendance of multiple PPIE activities in one day is also possible as travel time doesn’t need to be factored in.
* Can **keep in touch** with a wider audience/larger groups of people at one time as there isn’t the same limit to capacity as there would be if the PPIE activity was to take place in a meeting room.
* **Facilitates** a more engaged group of people who want to be there and contribute.

Save money/more cost effective:

* Online PPIE activities can be **cheaper** for organisations when compared to meetings in person as there will be no venue or catering costs.
* **Cost savings** for attendees and organisations on travel costs.

Online features/format:

* There is the opportunity to be **more creative** as the PPIE activity needs to be adapted to an online format which is harder to keep people engaged
* It is easier for people to **pick and choose** the sections of the PPIE activities that they want to join, and can leave whenever they choose without interrupting the PPIE activity. **Tip:** send the agenda beforehand
* PPIE activities can be **recorded** which means they can reach a wider audience rather than being limited to those attending on the day. Attendees must be informed of the recording in advance and consent must be sought by attendees. If a Zoom meeting is being recorded attendees will be reminded of this when they enter the virtual room and will be asked to confirm that they are happy to proceed. Remind attendees that they can turn off their video if preferred. **Tip**: recordings on Zoom can be edited to remove any sections of the PPIE activity that you don’t want shared. Subtitles and links to supporting material can also be added. Staff can download *Corel* VideoStudio *x10* for free from the University’s software centre which can be used to edit videos. For subtitles you can upload your recording to YouTube and it will generate subtitles for you. This can then be added to the recording on Corel VideoStudio. **Tip:** there are options available on Zoom regarding what is recorded e.g. chat,speakers only etc.
* PPIE activities **run more efficiently** as interruptions are reduced due to attendees being able to be put on mute by the host. **Tip**: there is a setting in Zoom which automatically mutes attendees when they enter the virtual room, they then cannot unmute themselves without your permission unless they are put into a breakout room. Visit the Zoom settings before you start a meeting, the section needed is at the bottom of the*Participants*panel in the *Panellists* tab.
* You can **share your screen** so attendees can see the documents/presentations from their own home. **Note:** the University has limited this Zoom setting as a security issue which allows only hosts to share their screen. **Tip:** you can have more than one host and can give people host privileges both before and during the zoom meeting.

**The negatives of online PPIE activities:**

Privacy:

* Online PPIE activities can be more difficult to **safeguard** as it isn’t always possible to monitor who is attending the meeting. **Tip:** create an Eventbrite where people register and send them the Zoom details a few days before the event. You can then review the attendee list in advance. Do not share Zoom details on social media.
* **Confidentiality and privacy** of discussions can be harder to manage as more attendees are able to join meetings and can join at any time. **Tip:** send an email to attendees detailing key points like confidentiality ahead of the meeting and remind them of these key points at the beginning and end of the PPIE activity. You can also write ground rules and key points like this in the chat function on zoom.
* **Tip:** most platforms, including Zoom, have features to set passwords for meetings, lock the meeting after a certain time so people can’t join late, and to see who wants to join the meeting before you admit them. For more information about this, see the [Faculty’s guide on how to use Zoom](http://documents.manchester.ac.uk/display.aspx?DocID=49774). **Tip:** ask attendees especially hosts and speakers to ensure that their full name is provided when signing on to the meeting. This will make it easier to admit and unmute them.

Technology:

* **Digital inequality** can be a limiting factor as not everyone will have Wi-Fi or access to a computer or tablet. This means that some members of the public won’t be able to be involved in online PPIE activities. **Tip**: consider contacting Public Contributors who don’t have access via telephone instead.
* Not all attendees will be **confident in using technology** to access online PPIE activities which may put them off attending. **Tip:** host a training session ahead of the first meeting/event in order to show them how to use the new meeting software. The Faculty recently hosted a zoom training session, the slides can be accessed [here](http://documents.manchester.ac.uk/display.aspx?DocID=49764).
* Often online PPIE activities are promoted online. This **could exclude people** who do not have an online presence from hearing about PPIE opportunities. **Tip**: consider using the telephone or printed media to widen the audience and make the advertising more accessible, rather than through social media/emails etc.

Impact on networking and relationships:

* It could be harder to keep people **engaged** for long periods when compared to face-to-face PPIE activities. **Tip**: schedule in comfort breaks, approx. five minutes for every hour.
* **Building relationships** online is more challenging when compared to in person as there isn’t the same opportunities to talk to attendees before and after the PPIE activity which could negatively impact networking. **Tip**: consider including some networking time before/after the PPIE activity and use the chat function if appropriate.
* **Poor internet connectivity** can result in lack of communication and involvement during PPIE activities which can be frustrating for attendees. **Tip:** hosts/guest speakers should all use an Ethernet cable where possible instead of Wi-Fi to strengthen their signal and improve connection for attendees.
* Risk of **not being able to reach** lesser heard groups and people who haven’t been involved before. **Tip:** use a range of communication channels to promote your PPIE activity.
* **Digital technologies and interactions** can often feel impersonal when compared to face-to-face. **Tip:** build in additional time for networking or include items to allow for discussion.

Emotional impact:

* If attendees have **poor connectivity** they can feel stressed, embarrassed and frustrated at not being able to participate fully in the PPIE activity. This may result in them not wanting to take part in an online activity again.
* Online PPIE activities are **more draining** compared to face-to-face as attendees need to concentrate more. **Tip:** schedule comfort breaks into the PPIE activity programme.

Other:

* Not all PPIE activities **will work** **in an online format**. Think about what format will be best for your PPIE activity. **Tip:** think creatively as to how to get the most out of attendees and keep them engaged throughout. Plan sections where attendees can have discussions to keep them involved and engaged and use the chat function throughout.
* It can be difficult to think of **new creative approaches** towards involvement and engagement. **Tip:** involve Public Contributors in the planning process.
* If attendees find online PPIE activities hard to contribute then hosts will **miss out on their input**. **Tip:** ask attendees to send additional comments after the PPIE activity, this could be done by creating a survey about the key sections. **Note:** you need to use the [University’s survey application](https://apps.mhs.manchester.ac.uk/surveys).

**Top Tips:**

Before the PPIE activity:

* Consider **who your audience is** in order to decide which online application to use e.g. Zoom, skype etc. **Tip:** if working with people who have autismconsider using skype/zoom text/chat section only with attendees being muted and videos turned off
* **Rehearse** the PPIE activity online beforehand with all hosts/speakers/activity leads etc.
* Explore if there can be a focus on **wellbeing and inclusion** during the PPIE activity.
* Provide **training for the facilitators and hosts** who lead the PPIE activity to improve confidence and ensure they have adapted to the online format.
* Provide **how-to-use guides** for attendees. **Tip:** you can access the Faculty’s Zoom how to guide [here](http://documents.manchester.ac.uk/display.aspx?DocID=49774).
* Plan a **break** into the programme e.g. 5 minutes for every 1.5 hours.
* **Assign roles to other members** to support you with the running of the online PPIE activity e.g. facilitators of breakout rooms, admitting attendees, muting and unmuting etc. This allows smoother co-ordination of the PPIE activity and can allow you to delegate tasks.
* Choose an appropriate space for the meeting e.g. there is a plain background behind you, choose a quiet place to limit distractions for yourself and attendees
* Email attendees a reminder including the agenda and what they can expect from the meeting/event and what their involvement looks like
* Risk assess the event/meeting taking into account the online format. **Tip:** the Faculty has created a template risk assessment specifically for PPIE activities which can be accessed [here](http://documents.manchester.ac.uk/display.aspx?DocID=46876)

During the PPIE activity:

* Have small **breakout rooms** of 4/5 people to allow for group discussions.
* Set **ground rules** at the start
* Monitor **mute buttons** to avoid interruptions
* Encourage attendees to provide **feedback** about the PPIE activity through polls, surveys and emails after the event/meeting. **Tip:** Zoom polls can be created in advance in the meeting settings.
* Encourage attendees to take part in a conversation in the chat function
* Limit online PPIE activities to **1.5 hours** to reduce strain on concentration.

After the PPIE activity:

* Send a **follow up email** asking for any additional comments to be emailed to you or by completing a survey.

Other considerations:

* Consider the audience and their **access to technology and bandwidth**.

**The Future of PPIE activities**

Attendees were also asked what they would like to see happen in the future regarding PPIE activities.

How PPIE activities are run/managed:

* **Continue to host online PPIE activities** for those who find this format more accessible.
* Have a **blended approach** and run parallel PPIE activities (online and in person) to cater for a range of attendees, e.g. have an online conference and an exhibition hall in person
* **Record the PPIE activities** so they can be watched later.
* Have **outputs and resources available online** before and after.
* **Prioritise PPIE** **activities** into nice-to-have versus essential to limit attendee online overload.
* Ensure the **end of a project is acknowledged** with everyone who was involved – online and/or in person. **Note:** adhere to government guidelines regarding social distancing.
* Provide **additional training** for those who could feel nervous about using online platforms. To access the Faculty’s Zoom how to guide, click [here](http://documents.manchester.ac.uk/display.aspx?DocID=49774).
* Set **clear expectations** of the outcome you want from the PPIE activity.

How people can be included:

* **Meet people** in person or have a telephone call before working with them online. **Note:** adhere to government guidelines regarding social distancing.
* **Have conversations** with groups and charities for disabled people and people with mental health issues to ensure that all PPIE activities (online and offline) are accessible.
* Create a format to **allow networking** which will prevent loneliness and will make people feel connected.
* Provide key Public Contributors who are heavily involved with your PPIE activity with the **necessary technology** so that they can access them online. The budget can potentially be covered by the savings made on travel.
* Create **‘digital community champions’** to train attendees in using different technologies for accessing online PPIE activities.

**Other considerations:**

* **Ethics of personal privacy and security** when conducting PPIE activities remotely. **Note:** use University approved systems only e.g. Zoom, select survey etc.
* Consider workplace relationships and **check in** on people outside of the PPIE activity.
* Ensure **safeguarding of vulnerable people** especially if PPIE activities are being recorded or streamed to a large audience. **Tip:** consult with other University staff who have experience of online engagement and always ensure that the PPIE activity is [risk assessed](http://documents.manchester.ac.uk/display.aspx?DocID=46876) beforehand.
* Consider the **duration** of the PPIE activity, and how long the recordings will be accessible for.
* Ensure **boundaries are upheld** between professional and personal interactions.

To access the Faculty’s full guide of hints and tips when using Zoom software, click [here](http://documents.manchester.ac.uk/display.aspx?DocID=51477), and for a simple how-to-use guide for Zoom, click [here](http://documents.manchester.ac.uk/display.aspx?DocID=49774).

For further information about the Faculty’s PPIE events, training and involvement opportunities, you can sign up for our [Monthly digest](https://www.bmh.manchester.ac.uk/connect/social-responsibility/contact/), follow us on [twitter](https://twitter.com/FBMH_SR), visit our [website](https://www.bmh.manchester.ac.uk/connect/social-responsibility/), or contact [srbmh@manchester.ac.uk](mailto:srbmh@manchester.ac.uk). For other PPIE resources, guidance and template documents, visit the Faculty’s PPIE Toolkit resource [here](https://www.staffnet.manchester.ac.uk/bmh/social-responsibility/public-and-patient-engagement/ppie-toolkit/).