

Faculty of Biology, Medicine and Health's (FBMH)

Patient and Public Involvement and Engagement (PPIE) Charter Mark: Summary and Pilot

Background

Within the Faculty of Biology, Medicine and Health (FBMH) involving and engaging members of the public (Public Contributors) is important to us because so much of what we do as a Faculty, from teaching clinical skills to scientific breakthroughs will have an effect on local communities and further afield. Public Contributors bring unique and valuable insights to our teaching and research so it is therefore essential to recognise the achievements of projects and activities that successfully use Patient and Public Involvement and Engagement (PPIE).

Public Contributor Kay Gallacher, Co-Chair of the Faculty's PPIE Forum, suggested that the Faculty create a charter to recognise and measure PPIE in research and teaching projects. This will help ensure an inclusive and achieve and maintain a high standard of PPIE within the Faculty, highlight the value of PPIE and widen its use and acceptability.

The proposal for the Faculty's PPIE Charter has been based on the [Patients Included Charter](#).

Assessing successful candidates:

The charter will be self-assessed where projects/activities/groups who feel that they meet the charter criteria can display the logo. It is awarded at a Bronze, silver or gold based on level of commitment to Charter Mark criteria.

Forum member feedback

The Charter Mark was drafted by the Social Responsibility and Public Engagement Team and taken to the March 2021, October 21, and the March 2022 Forum for members to provide feedback. The criteria was piloted by a Public Contributor and a PhD student in August 2022 and has been revised based on comments from the pilot and Forum members.

Next steps:

- Create logo
- Create guidelines for self assessment process

- Present to Faculty leadership team
- Pilot Charter Mark v2 e.g. PPIE group
- Discuss how to embed Charter Mark across the Faculty's research and teaching
- Promote Charter Mark throughout Faculty
- Present at future conference e.g. NCCPE

Example logo



Pilot work

The Faculty of Biology, Medicine and Health has co-created a Charter Mark with staff, students and Public Contributors to recognise when good quality PPIE has been included in our research and teaching. This will help to ensure an inclusive and high standard of PPIE within the Faculty, highlight the value of PPIE and widen its use and acceptability.

The Charter Mark

The Charter Mark invites you to assess PPIE in your research/teaching project. It is made up of 10 different criteria, each with three levels for you to assess your progress for a bronze, silver or gold award. You can use the Charter Mark to assess your progress, and/or to identify areas for improvement through the 'working towards' awards.

If you would like advice or guidance on how to conduct PPIE, or have any comments or queries regarding the Charter Mark, please contact the [Faculty's Social Responsibility and Public Engagement Team](#).

Why should I complete the Charter Mark?

The Charter Mark is a tool to aid you with your PPIE project/activities/groups by ensuring that you conduct your PPIE in an inclusive way and to a high standard. It will also standardise PPIE across the Faculty, ensuring a consistent approach to how we involve and engage patients and the public.

When should I complete the Charter Mark?

The Charter aims to be a tool to aid you in assessing your progress, and/or to identify areas for improvement through the 'working towards' awards. You can complete the Charter Mark at any time during your project/activity/group, however we would recommend that you use it as a reference throughout to ensure that you are conducting your PPIE to a high standard.

How the Charter Mark works:

- It is open to staff, students and Public Contributors to complete
- It is self-assessed. Projects/activities/groups who feel they have met the Charter Mark criteria can display the award logo on their website pages, project outputs, email signatures etc.
- For the self-assessment you will work through each criteria and award yourself the level which describes your work
- Awarded as bronze, silver or gold award (see below for award levels)
- You can self-assess the Charter Mark at any stage of a project/activity and can 'work towards' a bronze, silver or gold award ('work towards' logo must be downloaded)

Things of note:

We understand that our Public Contributors have different requirements. This Charter Mark is meant to be flexible so, for example if your resources are more appropriate for your audience (e.g. you involve Public Contributors with Dementia, Autism etc.) please use these alongside the Faculty's templates and award yourself the criteria level.

Example of a Charter Mark that has been awarded (to be added later)

FBMH PPIE Charter Mark summary v0.2 (EW)

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Last updated: 2022-12-16

- [add in example of project who has applied for Charter Mark]
- [add blog about it too]

Charter Mark award criteria

There are three main levels of awards; bronze, silver and gold. To gain the various award levels you will need to achieve the following:

Award	Criteria
Bronze Only	obtains scores in level 1 or a mix of level 1 and 2 (minimum of 6)
Silver	Obtains scores in level 2 or both level 2 and 3 (minimum of 6)
Gold	Obtains scores in level 3 only (minimum of 8)

You can also receive a 'working towards award' for either the bronze award or the level above your current award. Please give yourself your current award and state which award you are working towards.

*The word 'Output' is used to refer to any results or resources achieved or created during an involvement/engagement activity or project e.g. resources, articles/blog posts, focus/advisory groups, etc.

Where can I showcase my award?

You will be able to download your award and showcase it on email signatures, websites, social media etc. This will demonstrate that you have included PPIE to a good standard.

Criteria	Level 1	Level 2	Level 3
1) Data Management: Public Contributors to be fully informed about how their	This is mandatory for all levels (mark as level 3). General Data Protection Regulation (GDPR) and the Data Protection Act 2018 must be adhered to. Confidentiality must be maintained where required. Staff to have completed the University's mandatory training .		

data will be collected, used and stored during the project/activity in relation to the General Data Protection Regulation and the Data Protection Act 2018	<p>Suggested Public Contributor training (external) can be accessed here.</p> <p>Further information about GDPR and data protection at the University.</p> <p>Further information about data handling can be accessed here</p> <p>The Faculty's Public Contributor policy notice can be accessed here.</p>		
2) Inclusivity: Involve/engage a diverse range of Public Contributors. Includes contributors from under-represented or 'lesser heard' backgrounds	Involve/engage Public Contributors with a range of lived experience	Involve/engage a diverse range of Public Contributors to ensure our research and teaching meets the needs of the whole population.	Involve/engage a diverse range of Public Contributors to ensure our research and teaching meets the needs of the whole population. Includes people from under-represented groups or 'lesser heard' backgrounds, people with a range of experience etc. Optional Inclusive research training can be accessed here (open to all)
3) Involvement: Public Contributors ⁱ involved in the	Public Contributors have participated in at least one	Public Contributors have participated in at least two	Public Contributors have participated in at least three

design, delivery, dissemination and review (where appropriate) of the project/activity/output ⁱⁱ	aspect of the project e.g. co-design, co-delivery, dissemination or review	aspects of the project e.g. co-design, co-delivery, dissemination or review	aspects of the project or as a co-applicant, e.g. co-design, co-delivery, dissemination or review
4) Accessibility: Disability/accessibility requirements, additional support and necessary training related to the involvement/engagement ⁱⁱⁱ is provided to allow Public Contributors to fully contribute. Equality Act 2010 is adhered to	Disability/accessibility requirements are provided for Public Contributors	Disability/accessibility requirements and any additional support are provided for Public Contributors	Disability/accessibility requirements, additional support and necessary training related to the involvement/engagement ^{iv} is provided. Public Contributors are invited to attend the Faculty's Public Contributor Induction Session (optional attendance)
5) Information: Essential information must be communicated to Public Contributors before they begin their involvement/engagement, including:	Essential information has been provided to all Public Contributors. Information must be provided in an accessible format and lay language used.	Essential information has been provided to all Public Contributors plus additional information including information about the team, project etc.	Essential information has been provided to all Public Contributors plus additional information including information about the team, project etc.

<ul style="list-style-type: none"> • relevant payment information, • ground rules (can be informal and discussed at the start of a meeting) • project guidelines <p>Information must be provided in an accessible format and lay language used.</p>		<p>Information must be provided in an accessible format and lay language used.</p>	<p>Public Contributors have also been sent the Faculty's Public Contributor appointment letter and Induction guide where appropriate. (if your resources are more appropriate for your audience (e.g. you involve Public Contributors with Dementia) please use these in place of the Faculty's templates and award yourself this criteria)</p> <p>Information must be provided in an accessible format and lay language used.</p>
<p>6) Feedback: Public Contributors to be kept informed with relevant information:</p> <ul style="list-style-type: none"> • project milestones 	<p>Public Contributors have been informed about the outcome of the project.</p> <p>Information must be</p>	<p>Public Contributors have been kept informed with some of the relevant projects milestones.</p>	<p>Public Contributors have been kept informed with the relevant project milestones, how the project/activity is progressing/conti</p>

<ul style="list-style-type: none"> • impact of project/their involvement), • if/when these change • how the project/activity is progressing or continuing <p>Information must be provided in an accessible format and lay language used.</p>	<p>provided in an accessible format and lay language used.</p>	<p>Information must be provided in an accessible format and lay language used.</p>	<p>ning and any next steps. The ending or outcome of the project has also been communicated to the Public Contributor and any impact/feedback it has received.</p> <p>Information must be provided in an accessible format and lay language used.</p>
<p>7) Outputs: All outputs created as a result of involving/engaging Public Contributors must be freely accessible in print and/or digitally online and must contain a lay language section. Public Contributors to be involved in writing these outputs where appropriate.</p>	<p>Public Contributors to have access to the outputs created by the project.</p> <p>Resource outputs to be written in lay language and be in an accessible format.</p>	<p>Public Contributors and those associated (e.g. key stakeholders) with the project to have access to the outputs created by the project.</p> <p>All resource outputs to contain a lay language section and be in an accessible format.</p>	<p>Everyone to have access to the outputs created as a result of involving/engaging Public Contributors - must be freely accessible in print and/or digitally online and be in an accessible format.</p> <p>Public Contributors to be cited as an author and to reference that</p>

<p>Confidentiality must be adhered to where appropriate.</p> <p>*please note: some terminology cannot be translated into a different language</p>			<p>PPIE has been used.</p> <p>All resource outputs to contain a lay language section and Public Contributor outputs to be written in lay language.</p> <p>Outputs to be added to the Faculty's PPIE Toolkit and promoted via the Public Engagement Digest (send to srbmh@manchester.ac.uk) (if relevant to a wider audience)</p>
<p>8) Evaluation: PPIE event, project or activity to be evaluated to determine what went well and lessons learned</p>	<p>PPIE event, project or activity to be evaluated</p>	<p>Evaluation to be planned from the beginning of the project. What went well and lessons learnt to be included.</p> <p>Public Contributor feedback to be sought and included.</p>	<p>Evaluation to be planned from the beginning of the project.</p> <p>Public Contributors to be involved in the evaluation of the project (e.g. how it will be evaluated) and their feedback</p>

			<p>sought and included in the report.</p> <p>Evaluation report to be sent to all involved with the project.</p>
<p>9) Reimbursement: Public Contributors to be offered* financial reimbursed for their time, skills and travel where possible. If financially reimbursement cannot be provided, justification must be given prior to their involvement.</p> <p>*some Public Contributors may decline the offer of payment **Note: finance processing time approximately six weeks</p>	<p>Public Contributors to be offered financial reimbursed for their time or Justify prior to involvement if financial reimbursement cannot be provided.</p>	<p>Public Contributors to be offered financial reimbursed for their time. Staff adhere to the Faculty's fees and payments guidance for paying Public Contributor e.g. use a PR20 form or Justify prior to involvement if financial reimbursement cannot be provided.</p>	<p>Public Contributors to be offered financial reimbursed for their time, skills and travel. Staff adhere to the Faculty's fees and payments guidance e.g. use a PR20 form and payments must be processed in a timely manner or Justify prior to involvement if financial reimbursement cannot be provided.</p>
<p>10) Dissemination: Share best practice of involvement/eng</p>	<p>Staff/Students/Public Contributors write about their involvement/eng</p>	<p>Staff/Students/Public Contributors write about their involvement/eng</p>	<p>Staff/Students/Public Contributors write about their involvement/eng</p>

agement internally and externally to the University e.g. writing case studies/articles etc.	agement and promote via the Faculty's news . Lessons learned to be included.	agement and promote via the Faculty's news , Public Engagement Digest , PPIE blog . Must reference that public involvement/engagement has been used and be transparent about lessons learned.	agement and be transparent about lessons learned. Promote via Faculty's news , Public Engagement Digest , PPIE blog and submit as an external case study/article/publication. Must reference that public involvement/engagement has been used and Public Contributors to be cited as an author
Total per column			

Further Information and contact details:

To view information, templates and resources created specifically for PPIE related activities visit the [Faculty's PPIE Toolkit](#).

For further information about PPIE within the Faculty including events, training and funding opportunities sign up to the monthly [Public Engagement digest](#), visit the [Faculty's PPIE website](#) and [PPIE blog](#), follow [@FBMH SR](#) on Twitter or email the Social Responsibility and Public Engagement Team srbmh@manchester.ac.uk.

ⁱ Public Contributor is a commonly used term to describe a member of the public involved or engage in our research and teaching

ⁱⁱ An output could include the resources, documents and guidelines produced, an event, training or other face-to-face activity, or an evaluation report etc.

ⁱⁱⁱ “As far as is practicable for the applying organisation. Examples include: provision of universally accessible meeting spaces; accommodation of environmental sensory needs (e.g. light, heat, odour); fulfilment of formatting requests (e.g. provision of video captioning, audio files, signing, interpretation services)” as advised by [Patients Included](#). Use resources such as [AccessAble](#) to assess the accessibility of your activity venues.

^{iv} “As far as is practicable for the applying organisation. Examples include: provision of universally accessible meeting spaces; accommodation of environmental sensory needs (e.g. light, heat, odour); fulfilment of formatting requests (e.g. provision of video captioning, audio files, signing, interpretation services)” as advised by [Patients Included](#). Use resources such as [AccessAble](#) to assess the accessibility of your activity venues.