



**Draft PPI Corporate Action Plan to Enhance Personal and Public Involvement  
within the Southern Health and Social Care Trust**

**April 2014 – March 2015**

## **Introduction**

The Health and Social Services (Reform) (Northern Ireland) Order 2009 places a requirement on all health and social care bodies to effectively involve local people in plans and decisions about service provision in their area. The Public Health Agency through its regional PPI Forum has developed 5 PPI standards for approval by the DHSSPS:

1. PPI Leadership
2. PPI Governance
3. Opportunities and Support for Involvement
4. Knowledge and Skills
5. Measuring Outcomes

This corporate PPI strategic action plan details how the Southern Health and Social Care Trust complies with these standards building on the progress made previously to enhance Personal and Public Involvement (PPI) in the planning, delivery and evaluation of its services to support the Trust's new strategic direction in line with Transforming Your Care.

The leads for the development and implementation of the Trust's PPI Strategic Action Plan are:

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## Standard One - PPI Leadership

**Key Objective:** *HSC Organisations will have in place clear leadership arrangements for PPI to provide assurances that PPI is embedded into policy and practice.*

Key Deliverables	Key Actions 14/15	Timescales & Leads	Progress Update @ 31/1/15
Named Executive and Non -Executive PPI lead at Board Level with clear role descriptions and objectives	<ul style="list-style-type: none"> <li>• Angela McVeigh, Executive Director PPI</li> <li>• Edwin Graham, Non-Executive Director PPI</li> </ul>	Trust Board	<ul style="list-style-type: none"> <li>• <b>Completed</b></li> </ul>
Identify a designated PPI Operational Lead	<ul style="list-style-type: none"> <li>• Gerard Rocks, AD PWB (Acting)</li> <li>• Carolyn Agnew, Head of User Involvement and Community Development</li> </ul>	Angela McVeigh	<ul style="list-style-type: none"> <li>• <b>Completed</b></li> </ul>
Identify appropriate PPI leadership structure throughout the organisation	<ul style="list-style-type: none"> <li>• PPI leadership structure in place</li> <li>• PPI Strategic Action Plan 2010-2013 and PPI Consultation Scheme 2012- 2015 published and being implemented</li> </ul>	Trust Board	<ul style="list-style-type: none"> <li>• <b>Completed</b></li> <li>• Further detail included in PPI Performance Management Framework return together with supporting evidence</li> </ul>

## Standard Two – PPI Governance

<b>Key Objective:</b> <i>HSC Organisations will have in place clear corporate governance arrangements for PPI to provide assurances that PPI is embedded into policy and practice.</i>			
<b>Key Deliverables</b>	<b>Key Actions 14/15</b>	<b>Timescales &amp; Leads</b>	<b>Progress Update @ 31/1/15</b>
HSC organisations will have in place effective governance and corporate reporting structures for PPI.	<ul style="list-style-type: none"> <li>In line with the Regional Strategy (DHSSPS, 2004), Departmental Guidelines for PPI (DHSSPS, 2007 and 2012), sections 19 and 20 of the Health and Social Care (Reform) Act (Northern Ireland) 2009 and Quality Standards for Health and Social Care (DHSSPS, 2006) the Trust has prioritised Personal and Public Involvement (PPI) within all aspects of its business agenda and has established a range of governance, management and reporting mechanisms that reflect this.</li> </ul>	Trust Board	<ul style="list-style-type: none"> <li><b>Completed</b></li> <li>Further detail included in PPI Performance Management Framework return together with supporting evidence</li> </ul>
HSC organisations will develop an annual action plan with defined outcomes that demonstrate the positive impact of PPI.	<ul style="list-style-type: none"> <li>Each Directorate to develop PPI action plan focussing on five key themes:               <ul style="list-style-type: none"> <li>-Information</li> <li>-Service User and Carer Involvement;</li> <li>-Evidencing Patient &amp; Client Experience Standards;</li> <li>-Training;</li> <li>-Monitoring and Evaluation.</li> </ul> </li> <li>PPI Impact templates to be completed and returned to PPI Team</li> <li>At the end of each year progress report demonstrating the impact of PPI activity within each Directorate will be developed and made available on Trust website.</li> </ul>	Directorates with support from PPI Team May 2014 June and Dec 2014 Directorates with support from PPI Team March 2015	<ul style="list-style-type: none"> <li><b>Completed</b></li> <li>Email reminders re action plans sent March, April, May, June, September, October, November 2014</li> <li>Directorate action plans being developed as information returned</li> <li>Reminder for PPI Impact returns sent 13/6/14 for return 30/6/14</li> <li>110 PPI Impact Templates returned 30/06/14</li> <li>Reminder for PPI Impact returns sent 1/12/14 for return 22/1/15</li> </ul>
HSC Organisations will produce an Annual Report on PPI demonstrating evidence of compliance with their PPI responsibility and work undertaken to address challenges in this area.	<ul style="list-style-type: none"> <li>Develop user friendly PPI Annual Report in partnership with Trust staff and PPI Panel and publish on website</li> </ul>	PPI Team August 2014	<ul style="list-style-type: none"> <li><b>Completed</b></li> <li>PPI Newsletter completed and circulated May 2014.</li> <li>PPI Annual Report 13/14 completed August 2014</li> </ul>

### Standard Three – Opportunities and Support for Involvement

**Key Objective:** *HSC organisations will provide clear and accessible opportunities for involvement at all levels, facilitating and supporting the involvement of service users, carers and the public in the planning, delivery and evaluating of services.*

Key Deliverables	Key Actions 14/15	Timescales & Leads	Progress Update/ Impact @ 31/1/15
<p>HSC organisations will maintain an up-to-date register of existing and future opportunities for involvement at all levels across the organisation that is accessible by the public</p>	<ul style="list-style-type: none"> <li>• Trust annual directorate action plans require service teams to:               <ul style="list-style-type: none"> <li>○ Display Have Your Say posters, leaflets and opportunities for involvement</li> <li>○ Register and maintain database of interested people</li> </ul> </li> <li>• Organise PPI Information Event in partnership with PPI Panel and Directorate staff</li> <li>• Organise TYC in Action Event in partnership with PPI Panel and Directorate staff</li> <li>• Review and update Trust Consultation Scheme</li> </ul>	<p>Directorate Teams</p> <p>PPI Team 16/4/14 2/10/14 March 2015</p>	<ul style="list-style-type: none"> <li>• <b>Completed</b></li> <li>• <b>Completed</b>- Evaluation report very positive</li> <li>• PPI Newsletter completed and circulated May 2014</li> <li>• TYC in action postponed</li> </ul>
<p>HSC organisations will support the involvement of service users carers and the public to include:</p> <ul style="list-style-type: none"> <li>• Provision of clarity on roles/ responsibilities for those participating</li> <li>• Provision of training/ support including advocacy if required</li> <li>• Use of accessible communications</li> <li>• Good meeting etiquette</li> <li>• Application of HSC reimbursement guidelines</li> </ul>	<ul style="list-style-type: none"> <li>• PPI Toolkit developed for staff to provide guidance on supporting the involvement of service users, carers and the public in the areas highlighted. Good meeting etiquette contained in CD fact sheets- checklist being considered with PPI Panel.</li> <li>• PPI Awareness training made available for staff at Team meetings on request and twice a year at core Student Social Work induction programme.</li> <li>• Trust annual directorate action plans require service teams to provide:               <ul style="list-style-type: none"> <li>○ Information that supports the engagement and involvement of service users, carers and the public in a variety of formats to meet identified need.</li> <li>○ Training to support staff, service users, carers and other stakeholders to develop skills and knowledge to enhance service user involvement at all levels across the Trust.</li> </ul> </li> <li>• Development of Advocacy Information Booklet in partnership with Trust staff, providers and PPI Panel</li> <li>• Interim Service User, Carer and Stakeholder Reimbursement Guidelines and Procedures in place and applied</li> </ul>	<p>PPI Team</p> <p>PPI Team</p> <p>Directorate Teams</p> <p>PPI Team April 2014 PPI Team</p>	<ul style="list-style-type: none"> <li>• <b>Completed</b>- each service team received hard copy and pdf version available to download from Trust website/intranet.</li> <li>• At 31/1/15 869 staff, 350 students and 13 Trust Volunteers have received PPI Awareness training</li> <li>• Directorate PPI Action plans being implemented</li> <li>• Progress detailed in impact returns</li> <li>• <b>Completed</b>- Advocacy Information Booklet launched 16/4/14</li> <li>• <b>Completed</b>- amended to reflect new AFC travel rate and re-issued Dec 2104</li> </ul>

**Key Objective:** HSC organisations will provide clear and accessible opportunities for involvement at all levels, facilitating and supporting the involvement of service users, carers and the public in the planning, delivery and evaluating of services.

Key Deliverables	Key Actions 14/15	Timescales & Leads	Progress Update/ Impact @ 31/1/15
HSC organisations will have named points of contact for each individual engagement exercise	<ul style="list-style-type: none"> <li>• Included in PPI Toolkit and PPI fact sheets</li> <li>• Captured on PPI Impact Template</li> </ul>	Directorate Teams	<ul style="list-style-type: none"> <li>• <b>Completed</b></li> </ul>
Provide feedback to those involved on each engagement as standard practice	<ul style="list-style-type: none"> <li>• Included in PPI Toolkit and PPI fact sheets</li> <li>• Feedback template developed as part of toolkit and available to download from Trust website and intranet</li> <li>• Examples included in PPI Newsletters and Annual Report</li> </ul>	PPI Team	<ul style="list-style-type: none"> <li>• <b>Completed</b></li> </ul>
HSC organisations will as part of their action plans identify any barriers to involvement and develop actions to overcome these.	<ul style="list-style-type: none"> <li>• A PPI mapping exercise was undertaken in 2009/2010. The PPI Team developed a PPI Toolkit to address many of the issues raised, provided PPI Awareness training at Team meetings on request to allow a more specific focus and support. The Team has also developed a range of PPI fact sheets and templates and reimbursement guidelines as previously referenced.</li> <li>• Evaluation of PPI Team through LEAN project March 2014. No additional barriers identified however flow chart to be developed to provide further clarity for staff</li> <li>• Organise PPI Information Event in partnership with PPI Panel and Directorate staff</li> <li>• Continue to review and up-date PPI resources and/or develop new resources/actions as required to meet identified need</li> <li>• Participate in Research Team to develop proposal in response to HSC R&amp;D Division Enabling Research Awards- PPI and its Impact</li> </ul>	PPI Team  PPI Team April 2014 PPI Team 16/4/14 PPI Team March 2015 HOS UI & CD and P Gillen 13/6/14	<ul style="list-style-type: none"> <li>• <b>Completed</b> – informed development of PPI Action Plan template and PPI resources/training</li> <li>• Further detail included in PPI Performance Management Framework return together with supporting evidence</li> <li>• Flow chart completed to provide further clarity for staff</li> <li>• <b>Completed</b>- impact detailed in newsheet.</li> <li>• Purchase of 2 PPI pop-up stands</li> <li>• Advocacy Information Booklet launched 16/4/14</li> <li>• PPI research application developed in partnership with QUB, UJJ, SHSCT and service user researchers for submission 13/6/14.</li> <li>• Application approved 6/8/14</li> <li>• Literature review completed. RAG established which includes 2 PPI Panel members. Currently awaiting ethical approval before progressing fieldwork</li> </ul>

## Standard 4 Knowledge and Skills

**Key Objective:** *HSC organisations will provide PPI Awareness and training opportunities as appropriate to need, to enable all staff to deliver on their statutory PPI obligations.<sup>1</sup>*

<sup>1</sup> HSC Reform Act 2009, HSC Guidance on strengthening personal and public involvement in health and social care 09/2007, HSC Guidance for HSC organisations on arrangements for implementing effective personal and public involvement in the HSC 09/2012

Key Deliverables	Key Actions 14/15	Timescales & Leads	Progress Update/ Impact @ 31/1/15
Ensure basic PPI Awareness raising is built into induction arrangements for new staff	<ul style="list-style-type: none"> <li>Continue to provide PPI Awareness training to staff teams on request</li> <li>Continue to provide PPI Awareness training to student social workers at core induction programme</li> <li>Promote and encourage up-take of PHA PPI training programme when available</li> </ul>	PPI Team March 2015 Sept 14 Jan 15	<ul style="list-style-type: none"> <li>2 requests to date - from ACE (21 staff) -date being agreed. Training booked for Brain Injury Team 24/09/14 (14 staff) Eating Disorder Team (3 staff and 1 SU) 8/1/15</li> <li>PPI Awareness at core induction programme for 36 Student Social Workers 2/9/14 and 40 13<sup>th</sup> Jan 2015.</li> </ul>
Ensure compliance with any annually agreed regional targets for the provision of /access to PPI training	<ul style="list-style-type: none"> <li>Promote and encourage up-take of PCC E Learning PPI Awareness module when available</li> <li>Work with PHA and other PPI leads to agree content of new PPI training programme and coordination.</li> <li>Promote and encourage up-take of PHA PPI training programme when available</li> </ul>	April 2014 onwards June 2014 onwards August 2014	<ul style="list-style-type: none"> <li>On hold pending development of new PHA PPI training programme</li> <li><b>Completed</b></li> <li>Pilot programme promoted across directorates 6/8/14</li> <li><b>Completed-</b> however Trust staff not permitted to travel to training venues outside Trust area. PPI Coaching held in SHSCT venue- 8 staff attended out of 11. 3 staff to attend PPI T4T 12/2/15.</li> </ul>
Ensure mechanism is in place to capture up-take of PPI training	<ul style="list-style-type: none"> <li>Develop mechanism to capture up-take of PPI training</li> </ul>	PPI Team	<ul style="list-style-type: none"> <li>Captured manually</li> <li>Arrangements being made through new HRPTS system</li> </ul>
Demonstrate service user and carer involvement in the design, delivery or evaluation of PPI training	<ul style="list-style-type: none"> <li>Trust annual directorate action plans require service teams to ensure that Service Users, Carers and the public are involved in staff training.</li> <li>PPI Panel continue to be involved in development of new PPI training</li> </ul>	Directorate Teams  PPI Team	<ul style="list-style-type: none"> <li>Examples included in PPI Annual Report 13/14</li> <li>Impact template will capture progress for 14/15</li> </ul>

## Standard 5 - Measuring Outcomes

Key Objective: <i>HSC organisations will measure the impact and evaluate the outcome of PPI activity.</i>			
Key Deliverables	Key Actions 14/15	Timescales & Leads	Progress Update/Impact @ 31/1/15
Ensure service user and carer involvement in the monitoring and evaluation of PPI activity	<ul style="list-style-type: none"> <li>Directorate staff to complete and return PPI Impact template for each PPI activity on six monthly basis to PPI Team</li> </ul>	Directorate staff  June & Dec 2014	<ul style="list-style-type: none"> <li>Reminder for PPI Impact returns sent 13/6/14 for return 30/6/14</li> <li>110 PPI Impact Templates returned 30/06/14</li> <li>Reminder for PPI Impact returns sent 1/12/14 for return 22/1/15</li> </ul>
Demonstrate through the Annual Report: <ul style="list-style-type: none"> <li>How the needs and values of individuals and their families have been taken into account in the development and delivery of care.</li> <li>The outcomes/impact (positive/neutral/negative) achieved by using PPI approaches in respect of policy, investments, decisions and service delivery across the organisation.</li> </ul>	<ul style="list-style-type: none"> <li>Annual report to include case studies and service user/carer stories to demonstrate how the needs and values of individuals and their families have been taken into account in the development and delivery of care.</li> <li>Directorate staff to complete and return PPI Impact template for each PPI activity on six monthly basis to PPI Team</li> </ul>	PPI Team  Directorate staff June & Dec 2014	<ul style="list-style-type: none"> <li><b>Completed</b></li> <li>Reminder for PPI Impact returns sent 13/6/14 for return 30/6/14</li> <li>110 PPI Impact Templates returned 30/06/14</li> <li>Reminder for PPI Impact returns sent 1/12/14 for return 22/1/15</li> </ul>
PPI Performance Management Framework	<ul style="list-style-type: none"> <li>Complete and return self -audit</li> <li>Include Corporate PPI Action Plan, Directorate PPI Action Plans and PPI Annual Report 13/14 as supporting evidence</li> </ul>	PPI Team 31/1/15	<ul style="list-style-type: none"> <li>Self -Audit completed in partnership with PPI Panel and Equality Unit</li> <li>For approval at SMT 3/12/14</li> <li>For approval at PCEC 4/12/14</li> </ul>

