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## **Support for learning and development for public involvement in research**

### **Workshop report**

**February 2013**

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This document reports on the National Institute of Health Research (NIHR) workshop on learning and development for public involvement in research led by INVOLVE in January 2013.

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### **About this report**

This report was written by Lucy Simons with support from Maryrose Tarpey and Sarah Buckland of the INVOLVE Coordinating Centre.

This report should be referenced as: INVOLVE (2013) Support for learning and development for public involvement in research – workshop report. INVOLVE, Eastleigh.

## 1. Introduction

INVOLVE has identified support for learning and development of public involvement in research as a key opportunity for partnership working across the National Institute for Health Research (NIHR). Public involvement across the NIHR is flourishing with greater levels of activity than ever before. However, we believe a key risk to this progress would be the failure to ensure coordinated and cost-effective learning and development opportunities for members of the public and researchers / other research support staff involved in NIHR commissioned and funded research.

INVOLVE aims to support the development of an NIHR-wide approach to integrate learning and development opportunities into public involvement activity as appropriate. To facilitate this development INVOLVE convened a high-level workshop on 15 January 2013. The workshop aimed to (1) consider the potential for an NIHR-wide approach to learning and development for public involvement in research and (2) agree the next steps. Invited delegates were key NIHR directors and managers, senior Department of Health personnel, patient and public involvement leads, public contributors and INVOLVE advisory group members (see **appendix A** for a delegate list).

## 2. Guiding assumptions

When reading this report it is useful to be aware of some assumptions we are using to guide our work on this area.

- Researchers, research support staff (for example programme and public involvement managers and administrative staff) and members of the public may all have learning and development needs – this is who we mean when we refer to ‘people’ in this report.
- We are using the term ‘learning and development’ to describe how people may need to be adequately prepared for the tasks / roles they will be undertaking and supported during their role to enable them to be effective. People’s learning and development needs will vary according to the tasks / roles and their existing skills, background and knowledge. ‘Training’ and ‘support’ are some of the ways in which people’s learning and development needs may be met.
- People will have a range of needs and there is a range of ways of effectively meeting these needs – one size does not fit all.

### 3. Overview of the workshop

As co-chairs of the workshop, Russell Hamilton, Director of Research and Development at the Department of Health and Sarah Buckland, INVOLVE Director (who replaced Simon Denegri, INVOLVE Chair on the day due to illness), welcomed the delegates and set out the rationale for holding this workshop. This was followed by a panel question and answer session. The panel presenters, who had been selected to bring a range of perspectives, set out why learning and development was an important issue from their experience. Delegates were then invited to work with others at their table sharing the issues for learning and development in their context and discussing how an NIHR-wide approach would help. After tea, feedback from the table discussions was carried out through a 'revolving conversation' approach.<sup>1</sup> The afternoon was brought to a close with the co-chairs setting out the next steps for action. The programme for the workshop is in **appendix B**.

Delegates were sent a discussion paper in advance of the workshop to provide some background context and stimulate constructive discussion on the day. See **appendix C** for a copy of this paper.

### 4. Current landscape for learning and development

The first part of the workshop set out aspects of the current landscape for learning and development. These are summarised below.

- Learning and development provision for public involvement across the NIHR is patchy, does not always meet people's needs and often lacks resource commitment for long term sustainability.
- Strategic direction, senior level commitment and NIHR partnership working are needed to build capacity for public involvement in research.
- The risks of not addressing learning and development needs were identified as:
  - people not being effective in their roles
  - people getting disenchanted and being put off involvement
  - involvement not achieving the impact we wish.
- When learning and development is integrated into involvement initiatives it brings great benefits to researchers, members of the public and ultimately to the research – panel members identified how it enables all to learn how to work together and supports people in practical and emotional aspects as well as developing their knowledge and skills.

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<sup>1</sup> A 'revolving conversation' (or Samoan circle) is a method to facilitate discussion between participants on a specific topic. A small number of people (usually 4-6) are seated in a circle and they discuss the topic with each other while the rest of the group listens. Following certain rules, other people can join the conversation, but they can only speak if they are seated in the small circle. For more information see [www.kstoolkit.org/Samoan+Circle](http://www.kstoolkit.org/Samoan+Circle)

- Addressing quality for learning and development is vital and concern was expressed that, while there are pockets of good practice, quality assurance isn't always applied to learning and development for public involvement as it would be in other settings.
- Given the people who are the focus of this issue (researchers, research support staff and members of the public) it is essential to adopt an approach that understands adult learning processes.
- The NIHR provides us with a vehicle for effective learning and development programmes which will reach a large number of people and can take advantage of the knowledge and expertise available from the growing number of NIHR public involvement specialists.
- The importance of learning and development for senior researchers as well as the next generation was recognised – senior researchers may not have had opportunities for developing knowledge and skills around this earlier in their career and they can be positive role models when they work collaboratively with patients and the public.

## **5. Themes emerging from the workshop discussions**

The following five themes have been drawn from the content of the discussions on the day, facilitator notes and written feedback given by delegates at the end of and after the workshop.

### **5.1 Collaboration and cross-boundary working**

This theme was supported as a way to develop the action or development plan for moving forward on learning and development through a cross-NIHR working group (see next steps below). It was also supported as a way to deliver more coherent learning and development opportunities, for example through:

- centres and organisations collaborating to deliver learning opportunities on specific topics / roles
- centres and organisations collaborating across regions to offer learning opportunities
- greater networking and sharing of ideas, knowledge and resources
- different organisations leading on areas of work that would have wider benefit.

### **5.2 Establishing principles and values**

There was strong support for setting out clearly the essential principles and values which should underpin learning and development for public involvement in research across the NIHR. INVOLVE has begun this work with the publication of the

Developing training and support resource.<sup>2</sup> Further development work is required with a consensus across partners.

### **5.3 Building on what works**

The progress that has already been made in a number of areas was recognised in the workshop. Moreover, delegates were interested in drawing together the evidence we have on what works to support people's learning and development needs. Ideas for linking this to developing an adult learning approach, with clear guiding principles and quality assurance were suggested.

### **5.4 Co-construction and co-learning**

Throughout the workshop various delegates highlighted the powerful impact, and therefore effectiveness, of researchers and members of the public developing, delivering and participating in learning and development together. This was sometimes referred to as 'co-construction' (where members of the public are actively involved in designing learning opportunities) and 'co-learning' (where researchers, research support staff and members of the public learn alongside each other). It is difficult to imagine high quality learning and development for public involvement that is not developed 'with' and 'by' the public.

### **5.5 'Blended' learning**

It was recognised by most delegates that one approach or solution to meeting learning and development needs was not appropriate. A range of approaches is required to meet the wide range of learning and development needs. 'Blended' learning is the term usually used for combining face-to-face methods with online or computer-based activities. Given the distributed model of the NIHR, greater use of online computer-based methods should be explored to augment more traditional methods. Delegates thought it important for a range of methods to be available as they suit different purposes and it is not envisaged that distance learning or computer-based learning would replace face-to-face methods. In particular, delegates emphasised the value of experiential learning and opportunities for discussions with colleagues for developing knowledge and skills for public involvement.

## **6. Conclusions**

INVOLVE greatly appreciated the high level of interest in this workshop and engagement by the delegates with the discussion on the day. There was a clear message that delegates want to see progress on this issue within the next few months.

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<sup>2</sup> INVOLVE (2012) Developing training and support for public involvement in research. INVOLVE, Eastleigh. See [www.invo.org.uk/resource-centre/training-resource/](http://www.invo.org.uk/resource-centre/training-resource/)

Although there was clear support from delegates for a more coordinated approach across the NIHR to learning and development for public involvement in research, it was also clear that organisations were at different stages in the development of their thinking about this. Some delegates expressed frustration that they perceived progress on this issue to be slow, while others were only just beginning to explore the needs in their context. People also had a range of ideas about the potential for a more coordinated approach and what it should achieve. It was not possible, in the time available at the workshop, to reach a consensus about this. Therefore, this becomes the most pressing action for the next stage of the process.

## **7. Next steps**

### **7.1 INVOLVE to establish a time-limited, cross-NIHR working group with the specific remit to agree a plan for an NIHR-wide approach to learning and development for public involvement in research.**

- The working group will be chaired by Simon Denegri, INVOLVE Chair.
- It will initially comprise a nominated person from each part of the NIHR which took part in the workshop and INVOLVE advisory group members.
- INVOLVE will cover the costs of venues, catering, any facilitation / report writing and provide secretariat for the working group.
- The outcomes of the working group will be reported back to the Department of Health.

### **7.2 The first task of the working group will be to agree a developmental plan building on the workshop discussions and other wider knowledge of the issues.**

- From this workshop and other activities over recent years, INVOLVE has now gathered a wealth of information from a range of perspectives for learning and development for public involvement in research across the NIHR.
- This will be used to propose the objectives for the working group and priorities for an NIHR-wide approach.
- The objectives and priorities will be discussed and agreed at the first working group meeting.

### **7.3 INVOLVE to coordinate producing a summary of the specific learning and development needs for public involvement activities across the NIHR.**

- Some additional rapid scoping work on the specific learning and development needs for the different parts of the NIHR and current provision to meet these needs will support the plans for this working group.
- Gathering information on learning and development needs from NIHR colleagues at the start of the process will serve to focus the working group on areas where partnership working has the most value.

**We have an ambitious timeline as we aim to take forward these initial three actions by the end of March 2013.**

## Appendix A

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### NIHR workshop: Tuesday 15 January 2013 Learning and development for public involvement in research

#### Delegate list

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First name	Last Name	Role
Ade	Adebajo	Lead for Patient and Public Involvement, Collaboration for Leadership and Applied Health Research and Care (CLAHRC) for South Yorkshire
Lizzie	Amis	INVOLVE advisory group member
Richard	Baker	Director, CLAHRC for Leicestershire, Northamptonshire and Rutland
Claire	Ballinger	Deputy Director, Research Design Service South Central
Isabel	Boyer	Public contributor, NIHR Evaluation, Trials and Studies Coordinating Centre
Sarah	Buckland	Director, INVOLVE Coordinating Centre
Michael	Clark	Research Programme Manager, NIHR School for Social Care Research
Jean	Cooper-Moran	Senior Programme Manager, NIHR Central Commissioning Facility
Lisa	Cotterill	Director, NIHR Trainees Coordinating Centre
David	Cox	Deputy Director, Research Faculty, Research and Development Directorate, Department of Health
Ann	Deehan	Infrastructure Workforce Senior Manager, Research and Development Directorate, Department of Health
Simon	Denegri	Chair, INVOLVE
David	Evans	INVOLVE advisory group member
Alison	Ford	Public and Patient Involvement Manager, NIHR Evaluation, Trials and Studies Coordinating Centre
Tilly	Hale	Governor/Honorary Secretary, LIVErNORTH
Deborah	Hall	Director, NIHR Nottingham Hearing Biomedical Research Unit
Susan	Hamer	Organisational and Workforce Development Director, NIHR Clinical Research Network Coordinating Centre
Russell	Hamilton	Director of Research & Development, Department of Health
John	Hughes	INVOLVE advisory group member

Karen	Inns	Patient and Public Involvement Lead, National Institute for Health Research Cancer Research Network
Dave	Jones	Chair, NIHR Infrastructure Training Forum
Tom	Kenny	Director of External Affairs, NIHR Evaluation, Trials and Studies Coordinating Centre
Lynn	Kerridge	Chief Executive Officer, NIHR Evaluation, Trials and Studies Coordinating Centre
John	Kirwan	Professor, Academic Rheumatology Unit, University of Bristol
Martin	Knapp	Director, NIHR School for Social Care Research
Linda	Laurie	INVOLVE advisory group member
Rachel	Matthews	Programme Lead for Patient and Public Involvement, North West CLAHRC
Sophie	Newbound	Population Sciences Cluster Manager, NIHR Guy's and St Thomas' Foundation NHS Trust/King's College London Biomedical Research Centre
Kay	Pattison	Senior NIHR Programme Manager, Research and Development Directorate, Department of Health
Claire	Planner	Research Associate, NIHR School for Primary Care Research
Jennie	Popay	Deputy Director, NIHR School for Public Health Research
Pam	Richards	Research Partner, Academic Rheumatology Unit, University of Bristol
Andrew	Robinson	Patient and Public Involvement Officer, Research Design Service North East
Tony	Sargeant	INVOLVE advisory group member
Lucy	Simons	INVOLVE Coordinating Centre
Derek	Stewart	Associate Director of Patient and Public Involvement, NIHR Clinical Research Network Coordinating Centre
Maryrose	Tarpey	INVOLVE Coordinating Centre
Pete	Thompson	Senior Manager Personal Awards, NIHR Trainees Coordinating Centre
Christine	Vial	INVOLVE advisory group member
Amander	Wellings	INVOLVE advisory group member
Philippa	Yeeles	Head of Patient and Public Involvement, NIHR Central Commissioning Facility

## Appendix B

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### NIHR workshop Learning and development for public involvement in research

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**Date:** 15 January 2013

**Time:** 12.30 – 4.00pm

**Place:** Wellcome Collection Conference Centre, 183 Euston Road, London, NW1 2BE

**Objectives:** The objectives of the workshop are to (1) consider the potential for an NIHR-wide approach to learning and development for public involvement in research and (2) agree the next steps.

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### AGENDA

12:30pm      Arrival and lunch served in the Dale room

1:00pm      Workshop begins in the Franks / Steel room

Welcome and introduction  
Simon Denegri, Chair, INVOLVE  
Russell Hamilton, Director of Research and Development,  
Department of Health

1:15pm      Panel Question and Answer

Why is learning and development for public involvement important  
and what needs to be done?

Chair: John Hughes, INVOLVE advisory group member

Panel members

John Kirwan, Professor, Academic Rheumatology Unit, University of  
Bristol

Pam Richards, Research Partner, Academic Rheumatology Unit,  
University of Bristol

Mandy Wellings, INVOLVE advisory group member

Susan Hamer, Organisational and Workforce Development Director at the NIHR Clinical Research Network

Claire Planner, Research Associate, University of Manchester

Dave Jones, Chair, NIHR Infrastructure Training Forum

- 2:00pm      Group work on tables to consider these questions:
- What are the issues for your organisation in relation to learning and development for public involvement in research?
  - How could an NIHR-wide approach help to address them?
- Facilitator: David Evans, INVOLVE advisory group member
- 2:45pm      Coffee/Tea in the foyer
- 3:00pm      Report back from the small groups and discussion of priorities
- Facilitator: David Evans
- 3:45pm      Next Steps: Simon Denegri and Russell Hamilton
- 4:00pm      Close
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### **Learning and development for public involvement in research:**

#### **Background paper**

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Public involvement is a priority for the NIHR to deliver the vision to improve the health and wealth of the nation through research focused on the needs of patients and the public. At INVOLVE, we are aware of the deliberate effort required to meet the learning and development needs of both members of the public getting involved and researchers / research staff supporting involvement to ensure widespread, integrated and effective public involvement.

We are also aware that many centres are looking for support and guidance in the development of appropriate learning and development approaches. This is one of the most persistent issues we hear about from our stakeholders. While a number of training and support initiatives are taking place across the NIHR and further afield, there are risks of wasted resource through duplication of effort, lack of coordination, continuity and sustainability, and failure to fully address people's needs.

#### **What do we propose to do?**

We propose to facilitate discussions to identify whether and how an NIHR-wide partnership model for learning and development for public involvement could assist. The aim is to promote cost-effective, coordinated and integrated approaches to sustain and develop further capacity for public involvement. This could be achieved through greater coordination of current activity and harnessing current budgets for a limited number of new initiatives where these are required.

We suggest that a more coordinated approach will offer:

- increased capacity and capability to meet learning and development needs
- increased access to appropriate learning and development opportunities
- cost effective approaches to meet common learning and development needs
- increased quality of learning and development through better collaboration and evaluation.

#### **How will we do it?**

We propose an initial workshop with key NIHR and Department of Health strategic decision makers to:

- i. consider in more depth the potential for an NIHR-wide approach
- ii. identify broad parameters, outcomes and models of partnership working
- iii. invite support for implementing an action plan with nominated operational staff.

## **Where can you find out more?**

This project is specified in the [INVOLVE Operational Plan for 2012-13](#). A detailed project proposal with supporting background information is available on request from the INVOLVE Coordinating Centre. The next section sets out our proposed future directions for consideration at the workshop.

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## **Proposed future directions**

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### **Our vision for learning and development**

Across the NIHR appropriate learning and development opportunities are integrated into all programmes to ensure effective public involvement in research.

### **Achieving our vision**

Our aim is to initiate and support an NIHR-wide approach to ensure all public involvement activity has integrated learning and development opportunities for members of the public, researchers and research support staff as appropriate. We believe it is essential for public involvement in NIHR commissioned and funded research to be underpinned by relevant knowledge and skills.

### **What are the areas of debate and discussion across the NIHR?**

While there is widespread agreement that greater support is required for learning and development, there is less agreement on the best way forward to achieve this. From our current awareness of issues across the NIHR and other partners, areas of debate include:

- the extent of common learning and development needs across the research landscape
- the best delivery methods across a distributed organisation with separate budgets
- proposals to 'map' learning and development opportunities
- proposals for a repository of open access materials to support learning and development
- how to establish good practice / standards for learning and development, including for those leading learning and development approaches (such as 'train the trainer' programmes)
- suggestions for a 'core curriculum' and mandatory requirements for training for members of the public
- the best ways to embed learning for public involvement systematically into research career development programmes.

### **INVOLVE identified priorities for a strategic approach to learning and development**

We have identified three initial priorities which have scope to lay the foundations for an NIHR-wide approach and provide a framework for working through the issues identified above.

- i. Support for learning and development is purposefully included in all patient and public involvement and / or workforce development strategies across NIHR partner organisations.
- ii. Develop ways to share good practice and progress in meeting learning and development needs across partner organisations.

- iii. Promote regional and sector-wide collaborations for delivering learning and development.

We also suggest that an NIHR-wide approach is founded on the following principles.

- Each part of the NIHR will take responsibility for ensuring the delivery of learning and development appropriate to its needs and context.
- Collaborative working across the NIHR will be supported as an effective use of resources to achieve our vision.
- INVOLVE has a key role to support the NIHR towards our vision, bringing together the knowledge and expertise of our partners and those leading innovative methods for learning and development.

### **Proposed way forward**

To begin thinking about how an NIHR-wide approach could be taken forward, we set out three ideas to be considered for a possible action plan.

- **Address initial priorities through an NIHR working group**  
Initial priorities could be taken forward by a working group of NIHR partners. Members of this group could develop and implement an agreed action plan. INVOLVE would be willing to provide the administration for this working group, including the costs of any meetings / events. Any implementation costs would be met by NIHR partner organisations.
- **Publish a position paper on learning and development**  
A paper could set out the current landscape for learning and development, including the continued debates and any agreed action plans. A paper would help by communicating across the NIHR and wider partners our shared vision and work in progress.
- **INVOLVE to lead further work to test out ideas to address the areas of debate**  
Once the initial priorities are actioned, INVOLVE, with the support of the working group, could develop further ideas for how to develop ideas and options where there is continued debate and discussion about the best way forward.

**INVOLVE**

**January 2013**



INVOLVE is a national advisory body that is funded by the National Institute for Health Research to support public involvement in NHS, public health and social care research and development.

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