

Patient Engagement in a virtual world

Set up summary

A summary for General Practices (GPs) to help set up a virtual Patient Participation Group (PPG).

Welcome to our summary guide to setting up a Patient Participation Group (PPG) in Staffordshire and Stoke-on-Trent. The requirement for practices to engage with and review feedback from Patient Participation Groups (PPG) was reinstated from 1 July 2020 as it is important that practices continue to engage patients and citizens in the development and transformation of services over the rest of the year.

It is particularly important that practices engage with their PPGs to help understand and shape the changes in access to services to ensure that no one is inadvertently excluded. Practices are encouraged to conduct PPGs remotely to support social distancing and we have put together this document to help you.

What is a Patient Participation Group?

A PPG is usually formed of a group of patients and GP practice staff who work together to make improvements in patient care. PPGs also help to improve communication by facilitating discussions with the practice population, through letters, email newsletters (e-news), online surveys, the website, and social media (e.g. Facebook), and encourage patients to take more responsibility for their own health.

PPGs tend to be set up by a GP practice, but are then subsequently run by patients. Historically groups have met face-to-face, at least quarterly, however due to the Coronavirus pandemic it is now recommended that groups work as a 'virtual PPG', to ensure that all groups continue to work closely with the practice, its patients, and its GPs.

The importance of virtual Patient Participation Groups

A virtual PPG can be used to encourage and gain commitment from a diverse range of members, whilst reducing face to face interaction and therefore the risk of infection. The group can also be set up for patients who in the past wanted to be involved in a face-to-face PPG but were unable to attend physical meetings for whatever reason.

There are different ways in which a practice could run a virtual PPG, including email, phone, Facebook and other social media platforms and more information on these can be found on page 4 of this guide. Practices should adopt the same principles as a face to face PPG however and agree the same code of conduct.

At present the CCG uses a system called [Microsoft Teams](#) to host internal and external meetings, training sessions and webinars. Appendix 1 sets out some useful advice and step by step instructions on how to set up a virtual meeting using Teams. You can also find additional information on the [Microsoft Support website](#). Appendix 2 sets out a Meeting Etiquette, which you may find useful to share with your PPG ahead of a virtual meeting.

Step by Step Guide

Step 1 – Getting Started

A group can be started by a patient or a group of patients approaching the practice manager to enquire about setting up a group. Or a GP, practice manager or another member of practice staff can approach members of the public or groups to form a PPG.

Step 2 – Recruitment for a PPG

A group can be recruited by contacting people in the following ways:

Open Group – This kind of group can be formed by extending an open invitation to all registered patients. This helps to encourage a good representation by contacting a diverse mix of patients and could be done via email or by a link on your practice website.

Invited Group - Where individual patients are contacted directly by practice staff. These patients may also be well known within the community or have links to existing community and voluntary sector groups to try and extend the reach of the PPG.

Mixed Groups - To gain maximum opportunities for input, an invited group can form a core part of the group and additional recruitment can be used to supplement any participating patients.

Ensuring groups are representative

It can help to check the demographic of the patients at the practice to understand the make-up of the full population, including age, ethnicity, known illnesses, and gender. It is also important to note that the PPG is there to make sure the patient voice is listened to but not necessarily be the voice itself.

To encourage wider representation, PPGs could:

- Actively target certain groups that seem to be under-represented
- Encourage specific groups to provide input on a topic, if appropriate

Step 3 – The initial meeting

The first meeting is about agreeing mutual aims and goals for the group. The meeting should confirm that all members of the group are comfortable to share their views and begin to work towards mapping what skills and input members can bring to the meetings.

There should be a clear agenda, setting out the points for discussion. There is a requirement for a willing representative to take notes and actions, which will be sent to members after the meeting. This will help to keep things moving along and ensure future meetings flow.

Prior to the first meeting, a copy of the following documents should be shared with each attendee for review, discussion and to make any revisions, before they are adopted by the group:

- Ground Rules
- Meeting Etiquette
- Terms of Reference
- Confidentiality Agreement

Examples of the documents above can be found at the back of this summary

Step 4 – The second meeting

The second meeting will need to address some of the more administrative and organisational issues of the group. Below are some of the roles and arrangements that you might want to consider for your group:

- **Chairperson** – To manage the meeting and ensure all members are given the opportunity to speak. This person should ideally be a patient, rather than a member of staff from the practice.
- **Secretary** – To take minutes and note any actions. The role could be carried out by a member of staff at the practice or a patient.
- **Treasurer** – Firstly, decide if your group will be undertaking any fundraising activities, some groups will choose not to fundraise, and this is fine. However, if your group does wish to fundraise it will need a treasurer to manage budgets and finances.

- **Communications Lead / Point of Contact** – It may be useful to appoint someone to be the main point of contact for the group, for answering general queries or contacting members of the group between meetings.
- **Terms of Reference** – These should be outlined by the group and then mutually agreed.
- **Purpose and Objectives** – From the first meeting you should start to form a purpose and direction for the group. This should be reviewed and prioritised and developed into objectives and a work plan.
- **Work plan** – Develop a work plan based on the mutually agreed direction of the group. This could set out strategic and tactical approaches to work. This should also contain agreed timescales for the completion of tasks.
- **Future Meetings** – A decision should be made on the timing, frequency and format of future meetings.
- **Voting** – Decide on the quorum of the group, which is the minimum quantity of members required to agree a decision.
- **Size of Group** – Holding meetings virtually removes some of the traditional limitations to the size of a group, but some considerations could include ensuring a representative mix of people and also managing a discussion with large numbers of people.
- **Review Meeting** – Make plans to review the PPG arrangements on a yearly basis. This should look at the administration arrangements and PPG objectives.
- **Ongoing Development** – In the early stages of set-up and forming the group, the CCG can offer support in the group's development.

It may be helpful to contact an established PPG to gain insight and feedback, including routes for success and potential pitfalls to avoid. Please contact us at the CCG if you would like support with this. Some groups decide to affiliate with NAPP (National Association for Patient Participation), who can offer additional specialist support and advice.

Step 5 – Communication and feedback

Communication

A PPG meeting will be most effective if there is regular involvement from all patient and staff representatives. When this is the case, it will ensure consistent and up to date messages are shared and greater clarity over influence on outcomes can be shared.

It would be useful for the PPG Chair and Practice Manager to have regular meetings as this will greatly add to the insight of the group. The main aim of the group is to ensure effectiveness and these meetings are important to ensure that plans and decisions are implemented.

Feedback

PPGs should regularly feedback to patients and practice staff. This will ensure that everyone is kept up to date with developments and ensure a transparent working environment.

You might like to consider electronic newsletters, website or a general email address for queries, community or parish publications, open question sessions, social media channels and practice noticeboards.

Step 6 – Dealing with problems and difficulties

There may be potential for problems and challenges to arise within any PPG at any time, but, if handled in the right way, these can all be overcome. Providing clear roles and terms of reference can help. The CCG can also provide support in these situations.

Step 7 – Review

Present results and evaluate

- Share results and achievements of the PPG and any improvement plans with those involved, the local CCG and the wider community.
- Review and evaluate achievements against original aims and objectives. Consider how the information can be used to inform planning future activities.
- Review the format of meetings on an annual basis, including membership, identifying new members and opportunities for others to get involved.
- Liaise with and learn from other PPGs via the district patient groups.

Other options for virtual engagement

Email

Practices could routinely collect patient email addresses at registration to create a distribution channel, which could be used as the basis of a virtual group. Under the new General Data Protection Regulation (GDPR), practices are required to obtain explicit consent that patients are happy for the practice to contact them about their PPG. This can be done via an email, which includes why they would be contacted, how their personal data would be used and that they would have the opportunity to withdraw consent at any time. Once the virtual group has been established, emails can be sent out asking for members' opinions on a range of topics and to share relevant information/newsletters.

Social Media

Social media platforms such as Facebook offer a good opportunity to extend the reach of your groups and to also reach different demographics. For many, it is a convenient and efficient way of engaging with a practice.

It is also important to note that patients can create unofficial Facebook pages when they check in at a practice and it can be better to have a profile you can manage than one managed by patients.

Establishing your own Group on Facebook is straight forward and these groups can be made private and public, depending on the nature/sensitivity of the discussions. Information and guidance on establishing and interacting with Facebook Groups can be found on the [Facebook Support website](#).

Advice and Guidance

The Department of Health commissioned and developed [Creating a virtual PPG – getting started guide](#)

This guide was developed in consultation with patients, staff and patient group representatives, to support practices in setting up virtual PPGs. It contains a few simple tools that practices can use at the various stages of setting up a PPG and is deliberately simple and 'low-tech' in the hope that it provides a range of quick and easy ways to create a list of patients willing to help practices by giving their views.

Appendix 1: Join a meeting without a Microsoft Teams account

You can join a Teams meeting hosted by your GP practice anytime, from any device, whether you have a Microsoft Teams account or not. If you don't have an account, follow these steps to join as a guest.

Please follow the step by step process outlined below to access the Teams meeting:

1. You will be sent an invite link via email and to start the process, simply click on the link. It will look something like this –

- [Join Microsoft Teams Meeting](#)

- [Learn more about Teams](#) | [Meeting options](#)

2. The link will open a web page, where you will see two choices:
 - a. **Download the Windows app** and
 - b. **Join on the web instead.**

If you join on the web, you can use either Microsoft Edge or Google Chrome. Your browser may ask if it is okay for Teams to use your mic and camera. Be sure to allow access to both, as this will enable you to be seen and heard in the meeting.

3. Enter your name and choose your audio and video settings. We recommend that you initially turn your microphone off when joining the meeting to avoid interrupting any conversations taking place.
4. When you're ready, hit **Join now**.
5. This will bring you into the meeting lobby and the meeting organiser will be notified that you're there, and someone in the meeting can then admit you. In some instances, you may have automatic access to the meeting without the need to be admitted.

Please note if no one admits you to the meeting within 15 minutes, you'll be removed from the lobby. If that happens, you can try joining again.

Appendix 2: On-line meeting Etiquette

To make sure the meeting runs smoothly and on time, please follow the best practice approach:

- Turn off your camera and mute your microphone
- If you want to ask a question during the meeting or would like to have an input into the conversation, raise your hand and wait for the meeting Chair to acknowledge you
- Remember to un-mute your microphone when you're asked to join the conversation and mute yourself again afterwards
- Questions can also be submitted in the Chat function if you do not wish to raise a verbal enquiry

Please note that if your PC or laptop does not have microphone or camera capabilities you can still participate in the meeting. You will still be able to listen to the conversation and raise questions and/or add comments into the 'chat' panel. You may need to check the Settings on your machine to ensure that the microphone and camera have both been enabled.

Appendix 3: Sample Terms of Reference (ToR)

(Insert name of practice) PPG Terms of Reference

Name of the Group

The group is called the Patient Participation Group of (Name of GP practice).

Aim of the Group

The aim of the group is to encourage communication and co-operation between the practice and its patients so that both benefit.

Membership

Membership is open to all patients of the (Name of GP Practice), on a voluntary basis.

Focus of the Group

The overall focus of the group is to support service improvement as follows:

- To encourage discussions, invite input and request feedback to help service improvements
- To increase patient involvement within the practice
- To continually improve communication with patients
- To provide a mechanism to feedback on patient needs, concerns and suggestions
- To support patients to become better informed about healthcare options
- To request feedback from patients about current service levels and how improvements could be made
- To support the practice to communicate health promotions, e.g. Stay Well this Winter
- To work together on other areas as required
- To encourage good membership levels to ensure diverse representation, feedback and discussions
- To feed discussion up to the local district patient group and the local CCG, to ensure health needs and issues are raised.

Voting

Where a decision needs to be made by vote, this will need to include 50% of group members.

Appendix 4: Sample ground rules

(Insert name of practice) PPG Ground Rules

At the initial meeting, the members will agree the format for meetings and aim to keep to these for subsequent regular meetings:

Format

- Frequency (e.g. every two months)
- Duration (e.g. 1 ½ hours)
- Agenda Items (see sample) with indicative timings
- Start and finish on time and keep to the agenda.

Views

All views are valid and will be listened to with respect and understanding.

Proactive Discussion

Members should be open and honest and provide proactive feedback to encourage constructive discussions and challenge in a safe and respectful environment.

Discussion Forum

The group should be used to represent the patient voice and not for individual issues or complaints.

Mobile Phones

Mobile phones should be set to silent to avoid interruptions to the meeting – in the event that face to face meetings become acceptable and safe to attend again.

Attendance Levels

Members who commit to the group need to attend meetings on a regular basis.

A minimum non-attendance of three consecutive meetings is permissible at which point the membership of an individual will be reviewed and a decision made on them staying with the group.

Term of Membership

Agreement should be made on the term of serving the group as a Member and a Committee Member, e.g. two years. Following the initial set-up meeting, a comprehensive set of ground rules should be established, in discussion and agreement with the group, and shared with all members for reference for subsequent meetings.

Appendix 5: Sample Confidentiality Agreement

(Insert name of practice) PPG Confidentiality Agreement

General Data Protection Regulation

The Patient Participation Group of (Name of Practice) holds and processes information on behalf of its members and will keep all information confidential and secure.

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

Confidential Information

This agreement relates only to information obtained and held during the course of my involvement with the PPG of (Name of Practice), which is not in the public domain, relates solely to the PPG, and any third party dealings.

During my involvement with the PPG of (Name of Practice), or at any time after its termination for any reason, no confidential information will be used or disclosed to any person outside the group. I will endeavour to prevent any such use or disclosure by any other member or former member of the group. Disclosure of confidential information may result in the termination of my position with the PPG.

PPG Patient Representative

(Practice Name)

Staff Representative