

WALES CANCER RESEARCH CENTRE STANDARD OPERATING PROCEDURE

RECRUITING RESEARCH PARTNERS

Version: 1.9

Division: WCRC PPI

Supersedes:

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Revision Record

| Version | Reason for Revision |
|---------|--------------------------|
| 1.8 | Revision of existing SOP |
| 1.9 | Updated existing SOP |
| 2.0 | |
| 3.0 | |

Individuals using an SOP should ensure that they have the current version, which can be found via the WCRC internet. Printed SOPs are not version controlled documents.

Glossary

Research Partner (RP) – members of the public who are involved in research. Also known as Public Contributors

Project Co-ordinator – the main point of contact in a project. This could be the Trial Manager or a Project Officer

The Public Involvement and Engagement Team (PIE) – this team is part of the Health and Care Research Wales Support Centre

1. Introduction

The Wales Cancer Research Centre (WCRC) encourages and supports active public involvement in all stages of its research. It believes that public involvement will enhance the relevance, quality and impact of its research. For this to happen it is necessary to involve the public at all stages of the research process from generation of ideas to when results are shared.

Two Research Partners (RPs) will normally be recruited to each project to allow for absence and peer support.

RPs will be recruited through the Public Involvement and Engagement (PIE) Team at the Health and Care Research Wales Support Centre or through other existing networks or contacts. If recruited elsewhere, all RPs will be expected to join the public involvement community. This allows access to core training and support for the RPs.

The role of the Research Partner is entirely voluntary. Apart from reimbursement of expenses, the only payment offered is an honorarium. To comply with the employment law, it is important to avoid wording such as job/employment or contract.

2. Purpose

This Standard Operating Procedure (SOP) outlines the best practice procedure for recruiting the RPs to funded projects.

3. Scope

This SOP applies to RPs involved within the WCRC, recruited for funded projects.

4. Responsible Personnel

This SOP applies to all members of staff recruiting RPs in the WCRC.

Further advice and assistance

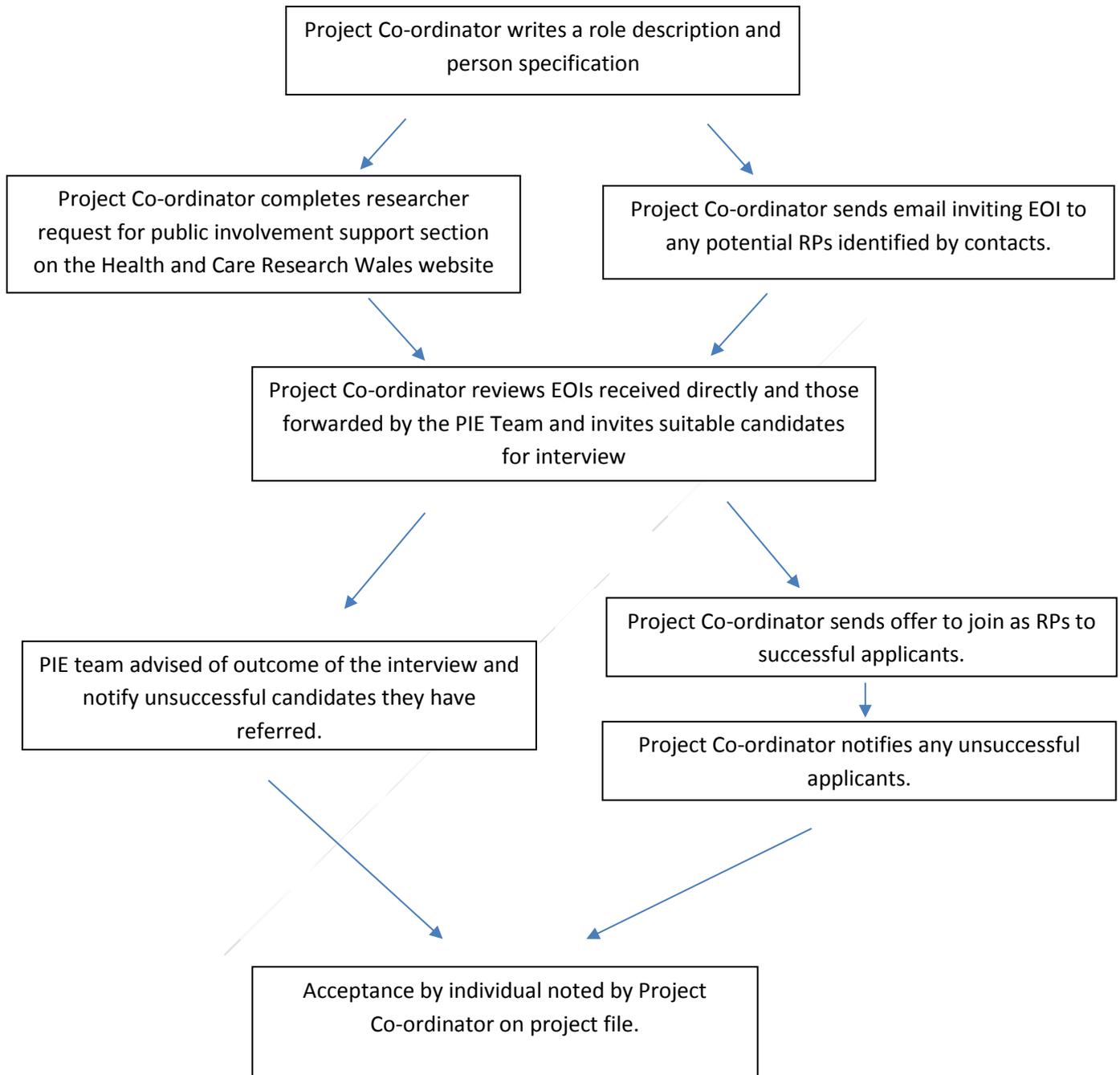
If you require advice or guidance on how to implement this SOP, please contact your Theme RPs. For contact details of your theme RPs, contact the PPI Project Officer.

It is essential to read the National Standards for Public Involvement: these standards are a national framework to improve the quality and consistency of public involvement in research. They include indicators to signal whether PPI in research meets the standards and can be found at

<https://sites.google.com/nih.ac.uk/pi-standards/home>

| Step | Action | Responsibility |
|------|---|--------------------------------|
| 1 | The responsibility to recruit and support RPs rests with the Project Co-ordinator. | Project Co-ordinator |
| 2 | The Project Co-ordinator will write a role description and person specification for the RPs (see Appendix 1). | Project Co-ordinator |
| 3 | The Project Co-ordinator will complete the “Researcher request for public involvement support” section on the Health and Care Research Wales website | Project Co-ordinator |
| 4 | The PIE Team will draft an advert and send it to the Project Co-ordinator for approval | PIE Team, Project Co-ordinator |
| 5 | The PIE Team will gather Expressions of Interest (EOI) and send all those suitable to the Project Co-ordinator. | PIE Team |
| 6 | The Project Co-ordinator will, at the same time as advertising through PIE, send an email inviting EOI from any potential RPs identified by contacts. | Project Co-ordinator |
| 7 | The Project Co-ordinator will receive EOI from all interested parties and send invitation letters to all suitable candidates. EOIs sent from the PIE Team will not include contact details. The Project Co-ordinator will need to contact the PIE team for contact details and to ascertain if the PIE team are able to pay travel costs for those being invited to interview. For candidates approached direct by the Project Co-ordinator, the travel costs must be funded by the Project. In some limited cases, the Project Co-ordinator may decide to conduct the interview by phone rather than face to face. | Project Co-ordinator |
| 8 | The Project Co-ordinator will select the most suitable candidates and send an offer letter and invitation to induction meeting. | Project Co-ordinator |
| 9 | The Project Co-ordinator will advise the PIE Team of the outcome of the interviews. The PIE Team will notify the other candidates that they have not been successful. | Project Co-ordinator |

Flow Chart



5. Appendices

1. Sample role description and person specification for RP to join a project
2. Example of email inviting expressions of interest
3. Sample of an invitation letter for interview
4. Sample topics and questions for interview
5. Sample of an offer letter and invitation to induction meeting with Partnership Agreement and CV template
6. Sample of rejection letter

1. Sample role description and person specification for RP to join a project

- Prepare for meetings by reading and considering all papers circulated before the meeting.
- Attend and make an active contribution providing a patient/ public perspective to meetings either in person (preferred) or by teleconference. These will be a maximum of six months apart.
- Review documentation as required and in particular any patient information to ensure it provides all the information the patient may need in a readily understandable way to enable them to make informed decisions.
- Make suggestions that will help ensure successful participant recruitment to the project.
- Make suggestions that will improve the experience of those being recruited to the project.
- Suggest channels through which the results of the project can be effectively communicated to concerned patient groups and interested members of the public.
- Take part in the dissemination of the results of the project to enhance its reach and impact.
- Attend induction and training as required to fulfil the requirements of this role.
- In conjunction with the Project Manager agree the specific contribution you can make to the project and the difference your contribution might make and agree how this will be captured.
- Complete a diary of your involvement to assist us in monitoring and evaluating public involvement in our projects and the impact on our research.
- Comply with our code of conduct for research partners.
- Complete a diary card on meetings attended identifying any ways in which we can further support you in your role.

Person specification

- Home base in Wales.
- Experience of the research area as a patient or carer or with specific project topic experience.
- Ability to reflect a broader range of patient, service user, carer and public perspectives.
- A level of literacy sufficient to be able to absorb and review project documentation.
- Experience of participating in meetings of a professional nature.
- The confidence to ask questions appropriately and give opinions providing a patient/public perspective in the presence of health care professionals.
- Willingness to join the public involvement community if not already a member

2. Example email inviting expressions of interest

Dear,

We would like to recruit a Research Partner to join (name of group)

Purpose of the project

Background of group

E.g. new or established

Skills/experience/knowledge required

- Some understanding of and empathy with the issues faced by cancer patients
- Willingness to prepare for meetings including reading circulated documents
- Ability to attend and contribute to meetings
- Ability to provide patient perspective and express this appropriately

Role of the Research Partner

To serve as a full member of the group and to contribute to its work both in and between meetings.

Commitment

Research Partners will be required to prepare for and attend the group meetings which usually take place every x months. Research partners will also be asked to keep a research diary.

Training may be offered

The project is expected to continue until x.

Honorarium and travel expenses will be paid for the attendance in person at the meetings and to cover preparation for the meeting and work resulting in the meeting.

If you are interested in taking on this role, please send me an email outlining why you would like to become involved and the skills and experience you could bring to the role.

Please respond by x

3. Sample of an Invitation Letter for interview

Thank you for expressing an interest in joining the project x.

I am the manager for this project and I would like to meet and tell you more about our work in general and the project in particular. I would be interested to find out more about your skills and experience and what you would need to be able to take on this voluntary role and will ask you a number of questions about this. I will be able to tell you about the training and support we can offer. You will be able to ask any questions you have about the role of Research Partner.

Could you please come to xxxxx on at..... I enclose a map of the campus with travel directions. We are situated at the xxxxx. When you arrive you will find a reception on the ground floor where you will be required to sign in. Please ask for me and I will come down and meet you.

If you are not able to attend at this time, please contact me to see if we are able to re-arrange.

I have also enclosed a lay summary of the project and a role description and person specification.

[You need to include a sentence here about who will pay the travel expenses and explain the process for this. You need to approach the PIE team in advance to clarify if they will pay for travel expenses for people recruited via them]

I look forward to meeting you

Yours faithfully

Enc.

Map

Lay summary of project or terms of reference of group if available

Role description and person specification

Pre-approval form for travel expenses.

4. Sample topics and questions for interview

1. Welcome and introductions

2. Suggested introduction to meeting (some or all of the following would be dependent on prior knowledge of interviewee)

The purpose of this meeting is for us to tell you more about our work in general and the x project in particular. By the end of the meeting, we would like to have learnt about the knowledge, skills and experience you have that would help you be actively involved in our work and we would like you to have a clear idea of what you would be taking on in accepting this voluntary role and what help and support would be available to you.

- Outline work of centre/unit and provide with any relevant brochures
- Provide information on the project
- Explain policy on public involvement and what can be achieved
- Outline training and support available including expense payments
- Explain PPI structure and organogram (enclosed overleaf)

3. Questions

You need to ask questions that will help you ascertain how well the person you are meeting fits the person specification you have prepared for this role. Here are some example/sample questions to help you explore experience, knowledge and skills and motivation as well as establishing support needs.

1. What is your interest in being involved in this project?
2. What is your personal experience of cancer? This may be as a patient, a carer or family or friend.
3. What is your knowledge or experience of medical projects/ other research projects?
4. What experience do you have of representing the interests of the public or a particular group?
5. There is quite a lot of reading to do in preparation for meetings and papers can be technical with a lot of jargon. How do you think you would manage this?
6. What would you do if you did not understand anything in the papers or at a meeting?
7. Tell me about any experience you have of serving on a committee.
8. Whilst your views will be shaped by your personal experience, your role would be to represent the wider interests of patients and public. How do you think you could do this?

9. How comfortable would you feel expressing your views in a group of professionals either in meetings or through teleconferencing?
10. Tell me about any experience you have of preparing written information for the public.
11. We want our research partners to play an active role in disseminating research findings. What experience do you have in this area or of making information more widely known to people in other areas?
12. Do you have regular access to an email account and/or telephone?
13. Would you have any difficulties in attending meetings in person?
14. What training have you had that you think would help you in this role and what training do you think you would need?
15. Are you already a member of the public involvement community? If no, are you willing to join?
16. After our discussion, do you feel you have a clear understanding of what will be involved?
17. Having spoken to us, do you have the time and commitment to fulfil this voluntary role and are you still interested?
18. Are there questions you would like to ask us?

Notes

WCRC Organogram



5. Sample of an Offer Letter and invitation to induction meeting

Dear,

Thank you for taking the time to visit us to talk about the research partner opportunity in connection with the x project. I/We enjoyed speaking to you and consider your skills and experience very well suited to the role of research partner on the x project/study and we would like you to join us in this voluntary capacity.

Please confirm that you are still interested in this voluntary role for the duration of the project which will be for a period of up to 3 years with the possibility of extension.*

All members of the project must complete a CV to be placed on the project management file. I have enclosed a template for you to use and would ask you to complete this and bring it with you to our next meeting.

We would like you to come to an induction meeting on with..... During this meeting we will provide you with more detailed information about the project and answer any further questions you have so that you will feel sufficiently informed to contribute when you attend your first project meeting.

In discussion with you, we will agree the specific contributions you will be able to make to the project and the difference your input can make. We will explain the record we would like you to keep of your involvement, to assist us in capturing and evaluating the impact our research partners have on our research.

We will also ask you to read and sign our partnership agreement and bring it with you to our next meeting. This is enclosed with this letter.

After each meeting you attend, we will ask you to complete a feedback form. The purpose of this form is to help us improve how we involve and support research partners to enable them to make an effective contribution. Finally, we will explain the process for claiming an honorarium for meetings and travel expenses when applicable.

As you know it is our policy to recruit two research partners for each project. Please confirm you are happy for me to pass your contact details to the other research partner so that you can make contact with each other.

I look forward to meeting you again and to working with you.

Kind regards,

Enclosures:

- CV template
- Partnership Agreement

***For non-project specific roles**

Partnership Agreement:

Public Participation and Involvement in the Wales Cancer Research Centre: A Statement of the Commitments and Mutual Expectations of Researchers and Research Partners.

This document has been developed based on the Code of Conduct for public involvement members vs 5.0 13 Aug 2015

Introduction

This document sets out to clarify the reasonable mutual expectations of researchers and Research Partners in their partnership. This document is not about the expectations of researchers that are specific to individual opportunities Research Partners may be involved in.

| | What Research Partners can expect from Researchers | What Researchers can expect from Research Partners |
|---------------------------------|---|---|
| Training & Induction | <ul style="list-style-type: none"> • An induction and training package to support you in your understanding of the aims and vision of the centre and the relevance and importance of public involvement in research. • Support, information or clarification regarding your role as a Research Partner. • Booking and payment for reasonable travel and accommodation for attendance at involvement activities, where the costs are to be met by the Wales Cancer Research Centre. All expenses must be agreed with the Researcher prior to any involvement activity. Reimbursement for agreed expenses which cannot be booked and paid for directly will be in line with guidelines provided by the Researcher. | <ul style="list-style-type: none"> • Willingness to join the public involvement community. • Willingness to attend any relevant training offered as part of an induction and to support you in your involvement opportunities. • An understanding of the core aims and vision of the Wales Cancer Research Centre and the relevance and importance of public involvement in research. • A commitment to understand the role being undertaken. • Understanding of activities you are contributing to, where the Researcher is covering the public involvement costs, so that (s) he can agree any expected expenses prior to the activity. This will include booking and paying for reasonable travel and accommodation where applicable. |

| | | |
|-----------------------------|--|--|
| | <ul style="list-style-type: none"> • The Health and Care Research Wales Public Involvement and Engagement Team to help you, if you are in receipt of benefits, make an informed choice about accepting an offer of payment for time (or a portion of it) for an involvement opportunity, or not. • Review of your role on an annual basis. • Requests for your feedback on involvement in individual opportunities as part of a scheme to measure the impact of public involvement on research. | <ul style="list-style-type: none"> • Consideration of the advice offered by the Public Involvement and Engagement Team before making a decision on accepting offer of honorarium. • Cooperation in the review of your role. • Commitment to respond to requests for feedback on your involvement opportunities by the given deadline. |
| <p>Communication</p> | <ul style="list-style-type: none"> • Newsletters produced by individual projects. • Access to literature on public involvement held by the researcher. • Adequate notice of meetings. • Timely provision of minutes of relevant meetings. | <ul style="list-style-type: none"> • Keep up to date with relevant news by reading newsletters produced. • A commitment to understanding the literature on public involvement. • Prepare for meetings, send apologies if unable to attend. • Read minutes of meetings and complete any agreed actions. |
| <p>Practice</p> | <ul style="list-style-type: none"> • To be treated at all times with respect and courtesy and to be treated fairly regardless of gender, sexual orientation, age, parental or marital status, disability, religion, colour, race, ethnic or national origins, or socio/economic background. A polite and professional manner from all staff when engaging with you as a Research Partner. However supporting individual Research Partners is part of the wider role and there will be | <ul style="list-style-type: none"> • Respectful and courteous treatment at all times of Researchers and the wider research community. We expect you to treat others fairly regardless of gender, sexual orientation, age, parental or marital status, disability, religion, colour, race, ethnic or national origins, or socio/economic background. A polite and professional manner when you are engaged as a Research Partner. For example, being clear when the issues you are expressing are your own opinions. |

| | | |
|--|--|---|
| | <p>limitations to the time they have to support Research Partners.</p> <ul style="list-style-type: none"> • Documents in the medium of the Welsh language, if available upon request. • Confidentiality from us as we have a legal obligation to comply with all appropriate legislation in respect of information where communicated verbally, electronically or in writing. • Recognition and thanks both personally at meetings and more widely where opportunities present themselves to offer this. • Punctuality from Researchers, arriving at meetings on time and attending for the full, agreed duration. • Adherence by researchers to the agenda of meetings when you are engaged with us as a Research Partner. | <p>An understanding that supporting individual public involvement community members is part of a wider role the Staff are employed to do, and there will be limitations to the time they have to support Research Partners.</p> <ul style="list-style-type: none"> • Confidentiality and an agreement that discussions within meetings are not disclosed inappropriately. • Acknowledgement of Researchers' support where appropriate. • Punctuality when you are engaged as Research Partners, arriving at meetings on time and attending for the full, agreed duration. • Transparency in your dealings with us, including declaration of any conflict of interests including those which may have an impact on the opportunities you are involved in. • Adherence to meetings' agendas when you are engaged as a Research Partner, taking a full part in the meeting, only drawing on personal experience where this will contribute to the group's aims. |
|--|--|---|

Rights / Entitlements for Research Partners

- You will have access to training, communications and support (as detailed above), to help you to perform in and improve your involvement opportunity.
- You have the right to leave a role as a Research Partner at any time. You are required to communicate this decision to us at the earliest opportunity.
- You will not be entitled to employment benefits (such as but not limited to sick leave, annual leave, maternity leave)
- In the event that you are found to be failing to fulfil these commitments or acting in a manner that is not professional or acceptable, we have the right to remove you from any involvement opportunity and to advise the Public Involvement and Engagement team with immediate effect.

If issues arise that mean that we need to consider removing you, we will discuss this with you first and try and resolve it between ourselves. If we cannot do so we may decide to remove you from the opportunity. We will inform you of this decision by way of a letter which explains the reasons for making this decision and how your removal will take place. Whilst there is no right of appeal against this decision (you are a volunteer and this is not an employer/employee relationship) we will, if requested, meet with you to discuss our reasons for making this decision. Please note that our decision in this respect is final.

This document is binding only in the sense that it is an expression of goodwill by you as a Research Partner with the Wales Cancer Research Centre. It is not intended to be seen as a legally binding contract as neither you, nor we intend any employment relationship to be created now or at any point in the future. Neither does it relate to the specific requirements of an opportunity which may require an agreement with the researchers you are involved with. These specific requirements could include a disclosure check, if appropriate.

Print name:

Signed:

Date:

Please sign and date the document and return to: Wales Cancer Research Centre, Room 1TB2 31, First Floor Main Building, University Hospital of Wales, Cardiff, CF14 4XN

CV template

Research Partner CV

Name

Date

Contact details

Email

Phone

(home)

(mobile)

Address

Lived experience of cancer as a patient/carer/relative

Experience of contributing to working groups, committees or similar

Experience of providing a public/patient perspective

Any other relevant skills or experience

6. Sample of a Rejection Letter

Dear,

Thank you for taking the time to visit us and to meet with us to talk about the research partner opportunity in connection with the x project/study/project.

Unfortunately we will not be asking you to join us at this time. I/We enjoyed speaking with you and hearing about your skills and experience. However, on this occasion we have invited another candidate to join us whose skills and experience are more in line with what we need on this particular project.

We hope you will allow us to keep your details on file and approach you should other suitable opportunities arise.

May I take this opportunity to thank you once again for your interest in our organisation and wish you every success in the future.

Kind regards

SAMPLE