Patient and Public Involvement and Engagement (PPI/E) in Research

Planning Guidance for Researchers
Contents

<table>
<thead>
<tr>
<th>Section 1 – Patient and Public Involvement (PPI/E) in Research</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What is PPI/E?</td>
<td>4</td>
</tr>
<tr>
<td>• Why is PPI/E important in research?</td>
<td>4</td>
</tr>
<tr>
<td>• Using the planning guidance</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section 2 – PPI/E Planning Checklists</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Understanding and thinking about PPI/E</td>
<td>7</td>
</tr>
<tr>
<td>• Further PPI/E Planning</td>
<td>8</td>
</tr>
<tr>
<td>• Working with your PPI reps</td>
<td>9</td>
</tr>
<tr>
<td>• Informing about PPI/E</td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section 3 – Tips and Your Notes</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Tips</td>
<td>12</td>
</tr>
<tr>
<td>• Notes/Ideas/Planning</td>
<td>13</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section 4 – Useful Information</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Evidence and case studies for PPI/E</td>
<td>15</td>
</tr>
<tr>
<td>• Useful Documents</td>
<td>16</td>
</tr>
<tr>
<td>• PPI/E in the research cycle</td>
<td>17</td>
</tr>
<tr>
<td>• Gantt Charts</td>
<td>18</td>
</tr>
<tr>
<td>• Acknowledgements</td>
<td>19</td>
</tr>
</tbody>
</table>
Section 1

Patient and Public Involvement and Engagement (PPI/E) in Research
What is PPI/E?

PPI/E means that we put patients and the public at the heart of our research. It is important that we understand and value the benefits of involving and listening to patients and the public. Effective PPI can really improve your research and the experience of your participants. Effective PPE means that patients and the public are kept informed about the research that we do.

PPI/E means that:

- Patients and the public are able to have a say in our research
- Patients and the public are able to share their ideas and opinions with us
- We are able to share knowledge and information to enhance public understanding of our research
- We can raise the profile of the Centre and the research that we do

Why is PPI/E important in research?

- It helps us understand patient perspectives and what matters most to people
- It can help us to improve patient care and experience
- It helps us to make sure that our research is important and relevant to patients and the public
- It helps us to make sure that the needs of research participants are met
- It helps to improve our research plans and processes
- It can help to increase participant recruitment into your research projects
- It leads to more opportunities to share research information with patients and the public
- It can help us to translate research into practice more quickly
- Most funding bodies will expect to see evidence of PPI/E in your research

Active and meaningful PPI means that we seek support, guidance and advice on our research projects and related activities from our patient and public representatives (reps). PPI can offer us a different way of thinking about research that adds value to our projects. Even if you are an expert in your field, your knowledge and experience will differ from that of someone who is using a service or living with a health condition. Members of the public may have personal knowledge and experience of the condition you are studying, or may be able to offer a more general public view.
Using the planning guidance

This document has been written to help researchers at all levels to think about planning and implementing PPI/E activities throughout the research process; from your research idea through to your results dissemination (see the Research Cycle on p.17). It is designed to help you think about opportunities and approaches for inviting patients and the public to be involved in your research. It is not intended to be an exhaustive list, but to guide you through some questions and options aimed at involving and engaging stakeholders in your research.

PPI can improve your research and it is important that all work coming out of the Centre of Excellence has an element of PPI evidenced. We would recommend that you involve people as early as possible in your research planning and related activities.

The document includes some pointers for best practice, as well as guiding you to other areas of support. The check-list of questions aims to ensure that PPI/E is covered in your research work. You can tick the boxes or write ‘Yes’ or ‘No’ in the right hand column of the PPI/E Planning Checklists, to help you decide the actions you should take. You can choose to look at the whole document at once, or use different sections as appropriate to your needs.

If you answer ‘no’ to any question, or there are any points that you are unsure about, then you can refer to some of the useful documents on p.16, or contact your PPI Team (details below).

Researchers who are more confident with PPI/E can use the PPI/E Quick Checklist (a separate document), to quickly check that everything has been planned for. If you are new to PPI/E or think you need more guidance or prompting, we strongly recommend that you use the PPI/E Planning Guide for Researchers, particularly Section 2 (PPI/E Planning Checklists).

We also strongly recommend that you read the INVOLVE Briefing Notes for Researchers (http://www.invo.org.uk/wp-content/uploads/2012/04/INVOLVEBriefingNotesApr2012.pdf) before planning any PPI/E activity.

For further support please contact:

Jo Adams, PPI Lead                          Vikki Develin, PPI/E Facilitator
Telephone: 023 8059 5287                 Telephone: 0115 82 31719
Email: ja@soton.ac.uk                     Email: victoria.develin@nuh.nhs.uk

Centre Website: http://www.sportsarthritisresearchuk.org/seoa/index.aspx
Section 2

PPI/E Planning Checklists
### Understanding and thinking about PPI/E

#### Make sure you are clear about PPI/E in your research

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please read Patient and Public Involvement and Engagement (PPI/E) in Research (see pages 4-5) and INVOLVE Briefing Notes for Researchers (see p.16)</td>
<td></td>
</tr>
<tr>
<td>Do you understand what PPI/E in research means?</td>
<td></td>
</tr>
<tr>
<td>Do you understand why PPI/E is beneficial to research?</td>
<td></td>
</tr>
<tr>
<td>Do you know what PPI/E support and training is available for you as a researcher?</td>
<td></td>
</tr>
<tr>
<td>Do you know about all the different ways that you can involve patients and the public (e.g. face to face focus group or ‘virtual’ advisory group)?</td>
<td></td>
</tr>
<tr>
<td>Do you know what support you might want from patients and the public?</td>
<td></td>
</tr>
<tr>
<td>Do you know what information you might want to gather from patients and the public?</td>
<td></td>
</tr>
<tr>
<td>Do you know how you will involve patients and the public without being tokenistic?</td>
<td></td>
</tr>
<tr>
<td>Do you understand the importance of involving more than one PPI rep?</td>
<td></td>
</tr>
<tr>
<td>Do you know who you might need to involve and how you would find them (for example through clinics or local support groups – see the Useful Documents Section, p.16, for more ideas)?</td>
<td></td>
</tr>
<tr>
<td>Have you thought about the PPI budget in your research and how to calculate this (see p.16)?</td>
<td></td>
</tr>
<tr>
<td>Have you thought about writing a role description with clear expectations for PPI reps?</td>
<td></td>
</tr>
<tr>
<td>Is the rest of your research team clear about PPI/E?</td>
<td></td>
</tr>
<tr>
<td>Have you contacted Jo Adams / Vikki Develin for support?</td>
<td></td>
</tr>
</tbody>
</table>
### Further PPI/E Planning

<table>
<thead>
<tr>
<th>Make sure you know when you want to start involving patients and the public (the earlier the better)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Do you know where your activity sits in the research cycle and whether you are looking for:</strong></td>
</tr>
<tr>
<td>People to help you prioritise research questions?</td>
</tr>
<tr>
<td>People to help you plan your grant application?</td>
</tr>
<tr>
<td>People to support you throughout the research project?</td>
</tr>
<tr>
<td>People to support you with developing research-related documents, activities and communications?</td>
</tr>
<tr>
<td>People to help you undertake the research?</td>
</tr>
<tr>
<td>People to help you analyse and interpret your results?</td>
</tr>
<tr>
<td>People to help you to disseminate your research information and/or findings?</td>
</tr>
<tr>
<td>People to help you in other areas of your research project?</td>
</tr>
<tr>
<td><strong>You can choose more than one of the above areas/activities to involve patients and the public</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Plan your PPI/E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please refer to the useful documents section (see p.16)</td>
</tr>
<tr>
<td><strong>Do you have a clear action plan / timeline for your involvement activities (see Gantt Charts, p 18)?</strong></td>
</tr>
<tr>
<td>Have you thought about how you might involve the diverse groups of people who might benefit from your research (e.g. ask PPI contacts to help assemble a focus group)?</td>
</tr>
<tr>
<td>Have you considered the potential for different social and cultural backgrounds and how this might affect PPE and/or recruitment to PPI and/or your research project?</td>
</tr>
<tr>
<td>Have you considered the need to be accessible?</td>
</tr>
<tr>
<td>Have you considered INVOLVE rates for payment (see p.16) and/or how you might reward your PPI reps?</td>
</tr>
<tr>
<td>Are you clear about how you will communicate with and feed back to your PPI reps and PPE audiences (use plain English and give clear information, see p.16)?</td>
</tr>
<tr>
<td>Did you know that we already have some PPI reps who are willing to help with our research projects?  Contact <strong>Jo Adams / Vikki Develin</strong> for more information.</td>
</tr>
</tbody>
</table>
## Working with your PPI reps

<table>
<thead>
<tr>
<th>Think about the tasks and activities you will ask your PPI/E representatives to undertake</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer to the <strong>INVOLVE Briefing Notes for Researchers</strong> and <strong>Research Cycle</strong> for ideas (see p.16-17)</td>
</tr>
<tr>
<td>Do you have clear plans that you can share with your PPI reps and research team (remember to be clear about requirements, expectations and time commitments)?</td>
</tr>
<tr>
<td>Do you know how you will facilitate your PPI group? Contact <strong>Jo Adams / Vikki Develin</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Think about support and training for your PPI/E representatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please refer to the <strong>Developing Training and Support</strong> guidance from INVOLVE (see p.16)</td>
</tr>
<tr>
<td>Do you know how you will support your PPI reps?</td>
</tr>
<tr>
<td>Are you aware of ways the Centre can support your PPI reps?</td>
</tr>
<tr>
<td>Are you aware of any mechanisms of peer support for PPI reps?</td>
</tr>
<tr>
<td>Do you know how you will train your PPI reps (if necessary)?</td>
</tr>
<tr>
<td>Will your PPI reps need project-specific training (e.g. into the condition being studied)?</td>
</tr>
<tr>
<td>Will your PPI reps need training in research background, local mechanisms, networks and structures?</td>
</tr>
<tr>
<td>Will your PPI reps need personal skills training?</td>
</tr>
<tr>
<td>You can contact <strong>Jo Adams / Vikki Develin</strong> a copy of the PPI induction manual for new PPI reps.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Think about your findings from PPI representatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will you need to examine your feedback from PPI reps to identify research priorities?</td>
</tr>
<tr>
<td>Will you need to examine your feedback from PPI reps and amend your grant proposal?</td>
</tr>
<tr>
<td>Will you need to examine your feedback from PPI reps and amend your research documents?</td>
</tr>
<tr>
<td>Will you need to examine your feedback from PPI reps and amend your research-related activities?</td>
</tr>
<tr>
<td>Have you fed back any amendments to your PPI reps?</td>
</tr>
<tr>
<td>If you have not made any amendments, have you fed back your reasons to your PPI reps?</td>
</tr>
<tr>
<td>You can ask the Centre PPI reps to help you analyse your PPI comments and observations. Contact <strong>Jo Adams / Vikki Develin</strong> for more information.</td>
</tr>
</tbody>
</table>
### Informing about PPI/E

#### Disseminate research information and results

- Have you identified the stakeholders and audiences with whom you should share research information and results?
- Have you considered all the different ways that you might communicate and publicise your research information or findings (e.g. written reports and letters, media, social media etc)?
- Have you made sure that all written communications are appropriate to your audience/recipient(s)?
- Have you considered how you will involve patients and the public in reporting and disseminating information and results (e.g. having a plain English version of final results, reviewed by PPI reps)?
- Have you considered how you will continue to disseminate your information and research findings to a wider audience once your research results have been published?
- Have you considered looking at Arthritis Today, or similar publications for examples?

#### Document and monitor your PPI/E

- Have you informed [Jo Adams](mailto:jo.adams@sportsarthritisresearchuk.org) / [Vikki Develin](mailto:vikki.develin@sportsarthritisresearchuk.org) of your PPI/E activity?
- Have you advertised your PPI/E activity on the Centre’s website?  
- Have you documented your PPI/E activity in your grant application?
- Have you documented PPI/E in your research outputs?
- Do you know how you will monitor effective PPI throughout your research process?
- Do you know that you should refer your research to the Centre PPI/E reps and/or PPI/E Team for regular reviews?  Contact [Jo Adams](mailto:jo.adams@sportsarthritisresearchuk.org) / [Vikki Develin](mailto:vikki.develin@sportsarthritisresearchuk.org) for more information

#### Evaluate your PPI/E

- How will you measure the impact of PPI/E in your research?
- How will you record, report and communicate progress (remember to use plain English)?
- How will you get feedback about the experiences of your PPI reps?
- How will you include PPI/E evaluation in the dissemination of your results?
**Tips**

- Think creatively about who/when/where/how to involve and engage patients and the public! Patients and the public can be involved in a whole range of research activities. PPI reps can support you in the form of consultation, collaboration and/or user-led research.
- Talk to colleagues – you may be able to support one another and swap ideas for PPI/E.
- Ethical approval is not needed for PPI in planning/advising on research.
- Be clear with patients/public and research teams about your requirements and expectations for PPI/E in your research projects.
- Involve people as early as possible and in as many activities as you can.
- Communication and dissemination of information are key to PPI/E - make sure you engage with patients and the public, providing regular updates with lay language that is clear, concise and easy to understand.
- Continue to update stakeholders and participants, even when your research project is finished – explain if/why there is a wait between completion and publication of results.
- Remember, PPI reps comments and personal details should be kept confidential, unless otherwise agreed with individuals.
- Try to be as inclusive as possible with the people you involve in your research and related activities.
- Allow at least two weeks’ notice for PPI/E reps to get involved in your research and related activities.
- Involve at least six people in your PPI activities, where possible.
- Rewarding your PPI/E reps doesn’t just have to be about money – a public thank you or an acknowledgement of their hard work is good practice (see p.19).
- Remember to learn from your previous activities! What went well? What didn’t go so well?
- Remember, you can contact the PPI/E Team for advice on any aspects of PPI/E in your research: Jo Adams, PPI Lead, Tel: 023 8059 5287, Email: ja@soton.ac.uk or Vikki Develin, PPI/E Facilitator, Tel: 0115 82 31719, Email: victoria.develin@nuh.nhs.uk

**Recording your PPI and feeding back**

- Record all planned PPI/E activities (even if you did not manage to get any PPI reps to support them) and the results of / actions arising from them.
- Think about your main themes and contributions from involving patients and the public and use these to make specific recommendations and changes to your research plans / project.
- Include individual comments in your records.
- Think about the aim of your PPI activities and why you have collected your chosen information.
- Think about whether your methods (e.g. focus group, online questionnaire) worked well or could have been improved upon.
- Feeding back to your PPI reps is really important; it is a good way of saying thank you and telling them that you have taken their comments and considerations on board.
- If you do not amend aspects of your project for any reason, explain the reasons for this.
- Ask your PPI reps about their experience of being involved in your research.
- Show the wider public the work that you have been doing, both in your research and in PPI.
<table>
<thead>
<tr>
<th>Notes/Ideas/Planning:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
Section 4

Useful Information
Evidence and case studies for PPI/E

To locate evidence related to PPI in research, please see:

- The INVOLVE website (http://www.involve.org/)
- The INVOLVE Evidence library (http://www.invo.org.uk/resource-centre/evidence-library/)

Further information on the views and experiences of researchers in relation to the impact of PPI on the quality of their research can be found here:

- ‘Exploring the Impact of Public Involvement on the Quality of Research’
  http://www.invo.org.uk/resource-centre/evidence-library/

- ‘Exploring Public Involvement in Research Funding Applications’
Useful Documents

For more information, please also see the following guidance documents:

**INVOLVE Briefing Notes for Researchers**
These briefing notes explain the different ways that members of the public are involved in research and help you to plan, resource and support PPI in your research.

‘Budgeting for Involvement’ provides advice on how to budget for PPI in research. The Involvement cost calculator helps you to work out the actual costs of PPI.

Offers advice and guidance to help develop training and support packages for members of the public, researchers or both

**Payment for Involvement**
A guide for making payments to members of the public actively involved in NHS, public health and social care research.

**Benefit Regulations Update**
May 2013 - update on how changes to benefits have implications for people receiving benefits if they are paid for active involvement in research.

**NIHR Programmes Payment Rates**
Framework for payments and reimbursement for PPI.

Helps you to think about communicating to a lay audience.

**Gunning Fog Index** - http://gunning-fog-index.com/
A tool that tries to calculate the Gunning Fog Index; a weighted average of the number of words per sentence, and the number of syllables per word. An interpretation is that the text can be understood by someone who left full-time education at a later age than the index. Copy and paste your text into the box to calculate.

**Guidance for Chairs** -
http://www.twocanassociates.co.uk/perch/resources/files/GuidanceForChairs2.doc
This guidance has been written to assist Chairs of research groups that include PPI members. It focuses on the aspects of chairing that PPI members have identified as being important. It does not aim to provide general advice on good chairing. However many of these suggestions are likely to benefit all group members – whatever their background – and will help groups to work together more effectively.

This Guide - the first of its kind - explains what patient leadership means and the role and purpose of patient leaders. It aims to help NHS organisations foster patient leadership and Patient Leaders.

Guides you through advertising and offers you a place to advertise for your PPI reps.
Identifying and prioritising

Commissioning

Designing and managing

Implementing

Evaluating Impact

PPI/E in the Research Cycle

Monitor and evaluate PPI throughout your research project and build an evidence base, recording short and long-term impacts. Patient and public reps are well-placed to evaluate the impact of PPI – ask them about their experience of being involved! They can also evaluate the potential impact of research results, perhaps from a different perspective than the research team.

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)

Identifying and prioritising:

- Undertaking
- Disseminating
- Implementing
- Designing and managing
- Commissioning
- Evaluating Impact

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)

Identifying and prioritising:

- Undertaking
- Disseminating
- Implementing
- Designing and managing
- Commissioning
- Evaluating Impact

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)

Identifying and prioritising:

- Undertaking
- Disseminating
- Implementing
- Designing and managing
- Commissioning
- Evaluating Impact

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)

Identifying and prioritising:

- Undertaking
- Disseminating
- Implementing
- Designing and managing
- Commissioning
- Evaluating Impact

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)

Identifying and prioritising:

- Undertaking
- Disseminating
- Implementing
- Designing and managing
- Commissioning
- Evaluating Impact

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)

Identifying and prioritising:

- Undertaking
- Disseminating
- Implementing
- Designing and managing
- Commissioning
- Evaluating Impact

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)

Identifying and prioritising:

- Undertaking
- Disseminating
- Implementing
- Designing and managing
- Commissioning
- Evaluating Impact

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)

Identifying and prioritising:

- Undertaking
- Disseminating
- Implementing
- Designing and managing
- Commissioning
- Evaluating Impact

Patients and the public can help to decide which topics should be researched. e.g. through online tools, discussion groups or questionnaires/interviews. This could be from a list of pre-chosen topics or patients/public could identify their own research topics.

This would usually be PPI within the funding organisation – most bodies will include PPI reps in their decision-making.

e.g. Co-applicants for funding, membership of steering committees or advisory groups. Support developing research tools, documents, information and activities.

e.g. carrying out interviews, running focus groups or analysing and interpreting results (with relevant experience and/or training)
Gantt Charts

A Gantt Chart makes it easy to track and chart project timelines. There are lots of different types of software that you can create Gantt Charts with and you may have access to Microsoft Project. Alternatively you can follow the steps from the link below to create a Gantt Chart in Microsoft Excel.


How to use a Gantt Chart

1. Begin by devising a list of all the activities that need to be completed during your research project. As you create the list, write down the earliest start date and the estimated length of time each activity will take.

2. Put the list you have drawn up in the order the tasks should be done.

3. Draft your Gantt chart onto Microsoft Project or Excel. Divide the sheet into the days or weeks you have allocated to work on your research project. Each task should go horizontally across the paper, represented as a solid bar with the estimated time it will take to complete each task written above each bar.

4. Create a second draft of the Gantt chart using the first as a guideline. Schedule the tasks paying attention to those that need to be completed first. Verify that resources are available and not being used for another task.

5. Prepare the final draft of the Gantt chart that incorporates both scheduling of tasks and resources. The final Gantt chart will show you how long it will take to complete the project with a certain number of people and which tasks need to be completed in which order.

6. Use the Gantt chart to assign and schedule tasks to research project members and make any necessary changes as circumstances of the project change.

Read more:

http://www.ehow.com/how_2156387_use-gantt-chart-project-management.html#ixzz2tDDZH5b0
Acknowledgements

Many thanks to:

Jo Adams, PPI Lead for Arthritis Research UK Centre of Sport Exercise and Osteoarthritis and Senior Lecturer, Professional Lead for Occupational Therapy, Southampton University

Carol-Anne Cantrell, PPI Representative

Jeff Christian, PPI Representative

Sian Cooper, PPI Representative

Cath Duhig, PPI Representative

Ros Kirk, PPI Representative

David Martin, PPI Representative

Katie Moore, Head of PPI, Nottingham University Hospitals NHS Trust

Julia Newton, Consultant Rheumatologist, Arthritis Research UK Centre of Sport Exercise and Osteoarthritis and Oxford University

Tony Redmond, Professor and Head of Clinical Biomechanics and Physical Medicine, Leeds Institute of Rheumatic and Musculoskeletal Medicine, University of Leeds.

Cynthia Russell, PPI Representative

Stevie Vanhegan, PPI Representative

Thanks also go to all the staff and PPI representatives who participated in our PPI Engagement event and commented on the document in the early stages

We have endeavoured to ensure that all information given is accurate and impartial and that all the relevant parties have been acknowledged.
Publications and websites:


Moore K and Leggott J (March 2013) - **Nottingham University Hospitals NHS Trust Patient and Public Involvement (PPI) Policy V1**
[https://www.nuh.nhs.uk/media/1491723/ggcm049_ppi_policy__version_1_.pdf](https://www.nuh.nhs.uk/media/1491723/ggcm049_ppi_policy__version_1_.pdf)
(accessed 05 March 2014)
