



*National Institute for  
Health Research*

# **Guidance for involving members of the public in interview panels, committees, and other panel membership**

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## Contents

METHODS USED FOR DEVELOPING THE GUIDANCE .....	7
The systematic review .....	7
Seeking views of the public.....	7
RECOMMENDATIONS SECTION ONE: RECOMMENDATIONS REGARDING THE ROLE OF MEMBERS OF THE PUBLIC.....	8
Expectations of the role .....	9
The role of public members in interview panels .....	10
Role in assessment/evaluation .....	12
RECOMMENDATIONS SECTION TWO: RECOMMENDATIONS FOR PREPARING MEMBERS OF THE PUBLIC FOR TAKING PART IN A PANEL OR COMMITTEE .....	13
Training .....	13
Orientation/induction .....	15
Information needs.....	16
Terminology .....	17
RECOMMENDATIONS SECTION THREE: RECOMMENDATIONS REGARDING ONGOING SUPPORT .....	17
Personal support .....	17
Other support needs.....	18
Financial matters.....	19
APPENDIX .....	21

This guidance has been produced for healthcare organisations and individuals in healthcare, that are contemplating having representation from members of the public on recruitment panels, committees, or other types of panels (such as audit panels, complaints panels, promotion panels). The guidance is also intended to be a useful resource for public individuals, if they are invited to become a public (or patient or lay) member of a panel or committee.

### Language used in this guidance

**Member of the public:** We are using the term “member of the public” to mean a person who is not an employee of, or a professional linked to an organisation. Other terms that may be used to refer to the same role on a panel or committee include: lay member; patient member; patient representative; expert patient; service user; community member; consumer; or lay advisor.

**Involvement:** We are using the term “involvement” to mean situations where members of the public are invited to be a member of, or contribute to a panel or committee. This may be for a one-off session (for example to help with interviews for a particular job), or a role over a longer time (for example over several years as a member of an ethics committee). It does not mean being involved in a research study as a participant.

**Guidance:** We are using the term “guidance” to mean recommendations and suggestions to help individuals and/or organisations involve members of the public most successfully.

**Interviews, committees and panels:** We hope that this guidance will be of relevance to public members taking part in a variety of situations such as employment selection, regulation panels, and committees within organisations.

## METHODS USED FOR DEVELOPING THE GUIDANCE

The guidance brings together findings from a systematic review of published and unpublished documents, together with advice and suggestions from members of the Research Design Service for Yorkshire and the Humber patient advisory panels and other patient involvement contacts across the Yorkshire and Humber region.

### The systematic review

We carried out the systematic review in 2015-2016. A systematic review looks for relevant documents that are written on a particular subject. It follows a series of laid-down steps, to make the process thorough. We looked for documents on public involvement in interview panels, and other panels and committees, in a structured and orderly way. We looked at electronic databases that store research that is published, and we also looked on the internet. All the relevant documents that we found were read, and key information was highlighted. This information was then brought together to make a list of learning points.

We wrote a research paper which described what we had found out from doing the systematic review. The documents which we read mentioned lots of different areas which could be problems, or should be thought about when involving public members in interviews, committees and panels. The documents outlined suggestions from researchers on the best ways to involve the public. We wanted to know what public members thought about these recommendations.

### Seeking views of the public

We organised a workshop in June 2016 to discuss the findings of the systematic review. The workshop was attended by 13 patient involvement representatives from across the Yorkshire and Humber region. We aimed to include a range of different views and experiences in the workshop. All participants had experience of being on an interview panel, two thirds many times and the other third a few times. All participants reported

that they had taken part in a committee, with the majority experiencing committee membership many times. The participants therefore brought considerable expertise to the workshop.

The research paper and a summary of the paper had been sent beforehand for participants to read in preparation for the workshop. The two and a half hour workshop began with small group discussion, with participants divided into three groups. One group discussed the findings about preparation for taking part in a panel, another group discussed the findings about the role of the public member, and the third group discussed the findings about ongoing support needs. Sheets had been prepared for each of the three areas, summarising a research finding within that area, the suggestions given by researchers, and key questions to ask. A table host for each group facilitated discussion of each question, and recorded responses on the sheet.

Following the workshop, the project lead (SB) analysed the written comments and drafted an initial guidance document. A few months later the draft document was sent to participants, and a second workshop was organised to further discuss and refine the guidance document. Following this workshop, an updated draft was distributed to participants for any further editing. The final guidance was then produced

The guidance is arranged in three areas of recommendations:

- The role of a public member
- Preparation for taking part in a panel
- Ongoing support needs.

## RECOMMENDATIONS SECTION ONE: RECOMMENDATIONS REGARDING THE ROLE OF MEMBERS OF THE PUBLIC

The systematic review identified that clarifying the role of public members was particularly important in three areas:

- expectations
- role in the recruitment panel process
- role in assessment or scoring.

Workshop discussion confirmed the significance of these areas. Participants highlighted the need for individuals and organisations to put strategies in place, to avoid any potential difficulties regarding the public member role.

### Expectations of the role

The review highlighted that there could be **confusion** regarding expectations of the role of a panel member, and that public members needed information about the expected role. It was described as important to ensure that everyone's expectations are the **same**, and to clarify **whose views** a public member is representing.

Participants at the workshop agreed that these recommendations are important, and there should be **clarity** about **why** the organisation is wanting public members involved, and the **scope** of what will be required. Participants highlighted the distinction between being a public member of a panel, and being a patient and public representative.

Participants supported the recommendation in the literature that a **job description or person specification** was valuable as different types of committees and panels would have different requirements, and a public member should be clear about what they can "bring to the table" (see Box 1). They suggested that public members should be **involved in the development** of the description and person specification, and examples from other areas such as job descriptions for school governors might be useful. They also emphasised the importance of fully considering the structure of the role; both at the **outset** of planning involvement, and also **right through** the period of involvement. They highlighted that putting these preparations in place required **time**, and this should be allowed for, particularly if less experienced people were going to be involved.

Participants emphasised the time and resources needed to involve people in the process of development of a job description and a person specification, and these costs should be considered.

Provide a short description of the role

Provide a person specification

List skills appropriate for the role

Provide the opportunity to shadow a current member

Carefully consider which communities are most appropriate to approach, in order to find the right person/people

Clarify what opportunities or benefits may be available to a public member, these do not have to be monetary, but may be about personal development, sharing skills and knowledge, or access to resources such as a University library.

*Box 1. Potential ways to clarify expectations*

### [The role of public members in interview panels](#)

Documents we found in the review relating to recruitment panels (for example job interviews, or interviewing prospective students) highlighted potential differences in the role that public members could have in the process. For some of the interviews, public panels members did not take part in the formal interview, but **met candidates separately** to ask questions about attitude and personal qualities. We also found examples where public members were asked to **suggest questions**, but did not take part in interviews. Another format described was having **two interview panels**, one public and one non-public members. Candidates were interviewed by each, and then both panels met at the end of the session to discuss their opinions. The final format described, was one where public members and other panel members **interviewed candidates together**.

Workshop participants discussed these different formats.

- Meeting candidates separately had the advantage of public members perhaps feeling more **comfortable**; however, interviewees might not be aware of it being part of the **formal process**.
- Suggesting questions was regarded as potentially useful, although it meant that public members did not see **how candidates answered** these questions.
- Having two separate panels was also considered to have potential however, it was mentioned that public members may struggle to **remember** individual candidates, and a **larger group** of public members would be needed.
- Joint interviewing was described as needing public members who were **experienced and confident** (or who had received sufficient training). Participants emphasised that the preferred format would depend on the level of **confidence, experience and skills** of the public member, together with the **needs** of the panel.

The workshop group concluded that the format may depend on what the interview is for, but there should be **clear guidance** at the outset for the public member, setting out what type of format will be used. The value of **meeting beforehand** to discuss and set the questions was emphasised. The group agreed that different types of panel members had **different skills and knowledge**, which meant that it may be more effective for public panel members to ask about personal qualities and attitudes than technical areas.

There was consensus amongst the group that a public member role should be recognised as being valuable to the process, but that it did not include **responsibility** for decision-making unless the member was very experienced, or had a Chair or Co-Chair role. Aspects to consider that may help the process are summarised in box 2.

Ensure that the process is meaningful for the public member and for the panel

Discuss the format and questions as a team in advance

Have a plan for situations where the public member has to drop out at the last minute

Have a stand in available, but consider how to support someone who may be a stand in or “second choice”

Recognise that being a panel member is stressful and ensure breaks are built in

Provide guidance regarding questioning styles, in particular the use of open versus closed questions

Consider having the public member ask candidates to talk about themselves, rather than them asking a series of questions.

*Box 2. Aspects to consider relating to the role in interview panels*

### [Role in assessment/evaluation](#)

The review found that public members were sometimes involved in assessment (for example assessment of interviewees, or evaluation of service quality), but not always. There were examples where public panel members were invited to assess, but their scores are worth less mark than other panel members.

Documents included in the review emphasised that there should be firstly, a **clear rationale** for why public members do or do not take part in the assessment. Secondly, if public members take part, there should be a **clear plan** for what happens if public members disagree with other panel members.

Workshop participants reported that they would feel comfortable taking part in the assessment, and considered that public members should, as a matter of course be **involved in scoring**. Some described their experiences of using scoring sheets on panels, and highlighted the value of a **structured process** such as a scoring sheet. As with other areas, they highlighted the value of training and/or **preparation**. There was

consensus amongst the group that the assessment of a public member should have equal weight to that of other members, but that the **responsibility** for decision-making should lie with the Chair of a panel or Committee or professionals. These aspects to consider are summarised in Box 3.

Public members should typically be included in assessment/scoring

Provide a structured and transparent process, for example by using checklists or scoring sheets

Be clear regarding the role of the public member and where responsibility for decision-making lies

Have a process in place for reaching consensus if there are disagreement

*Box 3. Aspects to consider relating to assessment/scoring*

## RECOMMENDATIONS SECTION TWO: RECOMMENDATIONS FOR PREPARING MEMBERS OF THE PUBLIC FOR TAKING PART IN A PANEL OR COMMITTEE

The systematic review identified four areas where preparatory work was required, prior to involvement from members of the public in panels or committees. These were: training; orientation and induction; information needs; and terminology.

### Training

The systematic review found that lay members often received little or no training before being asked to take part in a panel or to join a committee. The following areas were suggested by researchers as being potentially important for public members to receive training: knowledge of equal opportunities/equality and diversity; knowledge of recruitment processes; information on requirements regarding confidentiality and data protection; training on effective communication and personal attributes (such as confidence/how to influence).

Participants at the workshop confirmed the importance of receiving training to prepare for a role, and described how training may help to overcome feelings of **intimidation**.

Of the list of areas found in the systematic review, the need for training to develop **confidence** and communication was highlighted as a key focus. They emphasised that different contexts (for example one-off, versus regular contribution) required **flexibility**

in the training required, and that there should be attention paid to tailoring for individual requirements. Workshop participants also highlighted that organisations and individuals seeking public involvement should be clear about the **skills required** at the outset, what training would be available, and any particular areas of specialist knowledge or skills that would be necessary.

It was suggested that a **checklist** of knowledge/skills required (similar to a job specification) could be prepared for the role, with public members able to mark where they had existing skills or knowledge, and areas for further training. Workshop participants highlighted that training was important to encourage new people to be involved. They reported that there could be a tendency to select public members who had existing skills, and the offer of training was important to **widen the pool and diversity** of those who were able to contribute. Areas that may be useful to include in training are listed in Box 4

Equal opportunities and diversity
Recruitment processes
Confidentiality and data protection
Effective communication skills (such as how to influence)
Development of personal attributes (such as confidence)
Power relationships
Declaration of interest and dealing with potential conflicts
Provide practice sessions to develop any skills needed (such as asking interview questions)
Accountability/responsibility
Training specific to the role
Values based recruitment
Attitudes

*Box 4. Areas that may be useful to include in training*

During the workshop we discussed whether training should be mandatory (always required for all), or voluntary. The consensus was that some elements may be **mandatory** (such as equal opportunities) however; mandatory training requirements will

vary between different contexts. It was agreed that a level of transparency was important regarding the skills needed, and the skills and knowledge that public members were bringing. It was highlighted that training may also be required for non-public members of panels and committees. Training was described as a good means of **reassurance** for public members about their abilities (and providing evidence of assurance of a high standard of the process). It was recommended that **certificates** for completing training should always be available for public members, as this enhanced their CV, and provided evidence of knowledge and skills.

In regards to the way that training was provided, workshop participants highlighted that no model fits all. Some individuals in the group preferred **in-person** sessions; others found **online** modules more useful and convenient. The use of video snippets which could be watched online (such as YouTube) was described as potentially a good option as people were becoming increasingly familiar with this way of accessing information.

#### Orientation/induction

The systematic review found that orientation or induction was important to prepare public members for their role. Suggested ways of providing this are outlined in Box 5.

An initial briefing session

A tour of the facilities

A chance to meet the team to contribute ideas and ask questions

An informal lunch to meet the team or other committee or panel members

Sitting in on a session beforehand

#### *Box 5. Suggested ways to provide induction/orientation*

Participants at the workshop emphasised the value of having the opportunity to meet up before the first session, with all or some of the other people that would be there. It was described as **intimidating** to arrive for a meeting or session, not knowing anyone who would be there.

## Information needs

Documents included in the review described the need for public representatives to be provided with a range of information prior to their involvement. Suggestions given by researchers were discussed and agreed by workshop participants, and are outlined in Box 6. Additional items contributed by workshop participants related to an assessment matrix, decision-making processes, signposting, and practicalities.

Introduction to the organisation and the purpose/role of the panel/committee
Time commitment, remuneration and induction
The rationale for involving members of the public
Information about procedures and processes
Meeting schedules
Contact details for a named person in the event of questions or difficulties
Any assessment tools (such as a matrix) to be used
Information on decision-making processes
Information regarding where to go for further details (signposting to other resources)
Practicalities such as facilities for people with sensory or physical disability
Parking available, cost of parking, bus routes and timetables

### *Box 6. Useful information to receive*

Participants in the workshop described how an information pack was useful. This could be delivered by email or hard copy depending on preference. The importance of considering literacy and language needs when preparing information packs was highlighted, and also potentially providing the information in alternative forms such as audio/video clips. Some members of the group described situations when the information provided had not been the same as their experience on the day. It was therefore important that information provided was up-to-date and accurate.

## Terminology

Language was often mentioned in the systematic review as a barrier to meaningful involvement in panels and committees. Suggestions from researchers were: that public members should receive a **glossary** of terms or “jargon buster”; that panel members should be trained in terminology; or that panels should avoid all terminology.

Participants in the workshop emphasised that glossaries were an empowering tool, but that they needed to be clear, and not just jargon explaining jargon. Some had received glossaries that had been taken from academic texts and were not helpful. Participants recommended that only the main terms should be in a glossary, with a length of about a single sheet of A4.

The view amongst participants was that if the business of the panel or committee was such that highly technical language dominated proceedings, then rather than providing training, a public person should be recruited who had some knowledge of the area.

The key recommendations regarding terminology are summarised in Box 7.

Provide an easy read glossary or jargon buster

Adopt a rule during meetings that every time a jargon word is used, an explanation should be provided.

Encourage all individuals present to be alert to acronyms used by themselves or others

Encourage public members to request clarification.

*Box 7. Recommendations regarding terminology*

## RECOMMENDATIONS SECTION THREE: RECOMMENDATIONS REGARDING ONGOING SUPPORT

### Personal support

The review highlighted that public members of panels and committees benefit from ongoing personal support. Workshop participants described the potential for feelings of

**burden**, feeling **overwhelmed**, feeling **daunted**, or of **struggling** with a power imbalance. They highlighted how different individuals required **different levels** of support, and that **continuity** was helpful, as second and third meetings were always better than the first. Strategies which were recommended as providing personal support are listed in Box 8.

Have at least two public members to provide each other with support

Provide contact details for an identified person, someone to talk to or phone when something was unclear or there are concerns

Have a buddy system, pairing a newer member with a buddy who has been on the panel or committee for longer

Have a handover between members leaving and joining a panel or committee

Give opportunities to meet other public panel members

Have a mechanism in place to identify burden, or any issues relating to role and expectations

Provide clear feedback to the public member about their contribution

Be clear about the way out if a panel member wishes to withdraw.

*Box 8. Strategies to provide personal support for public members*

### Other support needs

The systematic review highlighted a number of other aspects that should be considered when inviting public members to join panels or committees (see Box 9). These were discussed at the workshop, with participants agreeing that of them, **accessibility** of venue is key. Participants also added the final point in the list regarding detailed information that was helpful. The group emphasised that attention should be paid to **individual needs**, and that a **contact** person to telephone on the day was essential in case of delay, problems, or help was needed. The **format** of information provision needed consideration to ensure that it was accessible for all.

Ensure that the venue is accessible

Ensure that the timing of sessions is convenient, and avoid peak hour travel on trains.

Consider internet access and information technology support

Send papers well ahead of meetings

Consider the amount of paperwork involved to minimise burden

Consider the amount that needs to be covered in meetings

Consider the accessibility of any training.

Provide clear and specific information including bus routes and stops, whether the venue is fully accessible or has steps or difficult doors, whether disabled toilets are located close by.

*Box 9. Other needs to consider*

### Financial matters

The final area highlighted by the systematic review concerned the need to consider financial matters (See Box 10). Authors of documents included in the review stressed the need to allocate sufficient resources to enable public participation in panels. The documents described a variety of ways for **recognising, rewarding, or reimbursing** the contribution of public members. These were: offering honorary contracts or casual contracts; ensuring travel costs and costs to cover care of a family member are provided; providing vouchers to reimburse for time; covering travelling costs but not reimbursing for time. Some studies discussed whether panel members should be reimbursed for their time spent undertaking training.

Workshop participants had mixed views regarding contracts and reimbursement. Some highlighted the implications of payment or vouchers on tax affairs, allowances and benefits. The group consensus was that as a minimum travel costs and care costs should be offered. Transparency and recognition were described as being key to financial matters, with clear information regarding any implications on benefits being

provided. It was recognised that there are many different types of panels and committees, with some more short term or even one-off, while others require a longer term commitment, and different strategies regarding payment. The group suggested that recognition and reward could come via providing opportunities such as paying for attendance at events or conferences, or providing books or other materials.

Ensure adequate resources are available

Develop a clear policy regarding payment

Consider how travelling or other expenses will be reimbursed

Clarify potential impacts on allowances or benefits

Consider alternative ways of recognising contributions

*Box 10. Aspects to consider relating to financial matters*

## APPENDIX

### Checklist of items to consider when involving members of the public in panels or committees

<b>ENABLE UNDERSTANDING OF THE ROLE</b>	
Provide a short description of the role	
Provide a person specification or list skills appropriate for the role	
Provide the opportunity to shadow a current member	
Clarify what opportunities or benefits may be available to a public member, these do not have to be monetary, but may be about personal development, sharing skills and knowledge, or access to resources such as a University library.	
<b>FINANCIAL MATTERS</b>	
Ensure adequate resources are available	
Develop a clear policy regarding payment	
Consider how travelling or other expenses will be reimbursed	
Clarify potential impacts on allowances or benefits	
Consider alternative ways of recognising contributions	
<b>PROVIDE ORIENTATION/INDUCTION</b>	
Consider orientation/induction needs by providing for example an initial briefing session, a tour of the facilities, a chance to meet the team to contribute ideas and ask questions, an informal lunch to meet the team or other committee or panel members, offering the chance to sit in on a session beforehand.	
<b>PROVIDE APPROPRIATE INFORMATION</b>	
Provide information on the organisation and the purpose/role of the panel/committee	
Give information on time commitment, remuneration and induction	
Explain the rationale for involving members of the public	
Provide information about procedures and processes	
Provide meeting schedules	
Provide contact details for a named person in the event of questions or difficulties	
Provide any assessment tools (such as a matrix) to be used	
Give information on decision-making processes	
Provide information regarding where to go for further details (signposting to other resources)	
Include information on practicalities such as parking available, cost of parking, bus routes and timetables	
<b>PROVIDE APPROPRIATE TRAINING</b>	
Use a checklist to discover where a person has existing knowledge, and where training is required	
Provide training in equal opportunities and diversity	
Provide training in recruitment processes	
Provide training in confidentiality and data protection	
Provide training in effective communication skills (such as how to influence)	
Provide training in development of personal attributes (such as confidence,	

dealing with power relationships or potential conflicts)	
Provide practice sessions to develop any skills needed (such as asking interview questions)	
Provide training in accountability/responsibility	
Provide training in values based recruitment	
Provide other training specific to the role	
Give opportunities to meet other public panel members	
Have a mechanism in place to identify burden, or any issues relating to role and expectations	
Provide clear feedback to the public member about their contribution	
Be clear about the way out if a panel member wishes to withdraw.	
Provide an easy read glossary or jargon buster	
Adopt a rule during meetings that every time a jargon word is used, an explanation should be provided.	
Encourage all individuals present to be alert to acronyms used by themselves or others	
Encourage public members to request clarification.	
<b>INVOLVEMENT IN ASSESSMENT OR SCORING</b>	
Public members should typically be included in assessment/scoring	
Provide a structured and transparent process, for example by using checklists or scoring sheets	
Be clear regarding the role of the public member and where responsibility for decision-making lies	
Have a process in place for reaching consensus if there are disagreements.	
<b>SPECIFIC CONSIDERATIONS FOR INTERVIEW PANELS</b>	
Ensure that the process is meaningful for the public member and for the panel	
Discuss the format and questions as a team in advance	
Have a plan for situations where the public member has to drop out at the last minute	
Have a stand in available, but consider how to support someone who may be a stand in or “second choice”	
Recognise that being a panel member is stressful and ensure breaks are built in	
Provide guidance regarding questioning styles, in particular the use of open versus closed questions	
Consider having the public member ask candidates to talk about themselves, rather than them asking a series of questions.	
<b>Clarity of Language</b>	
Ensure that language is clear and jargon-free throughout the process	