# PPI workforce career recognition and training – addition to main report

This document is an addendum to the [main report](#) produced about this work to develop career recognition and training for the PPI workforce.

## Follow-up workshops – March 2024
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**Planning**

Having completed the pilots which received positive, but also constructive, feedback, we were keen to make use of this to develop and test the workshops further. We therefore used the remaining budget to commission follow-up work from Janet Allison and her actor collaborators.

Key points from the feedback that we considered were the length and timing of the workshops, and also the content. Several attendees had said that they thought it would be useful for the workshops to be aimed at different levels of experience, so we created two scenarios which were designed to illustrate situations that might be encountered by less and more experienced PPI facilitators. On reflection, we decided it was better to pitch these as less and more complex scenarios, as inexperienced PPI staff may also find themselves having to handle very difficult situations.

The scenarios were co-developed: Janet had conversations with PPI staff, mental health service user researchers who also worked in PPI and a public contributor about their real-life experiences. Janet also drew on her previous discussions with PPI staff and contributors that had informed the pilots. We began this process with an online meeting, and subsequently refined the scenarios over email.

Notably, the new scenarios also drew some subject matter from the feedback: a small number of the pilot participants had found some of the content upsetting. This became a learning point: it was decided that staging potentially distressing scenarios should not be avoided, as such situations do indeed arise in PPI work and therefore working on addressing them could be invaluable for PPI staff. We ensured that the potentially distressing nature of some of the scenarios would be clearly signposted and that participants knew there was support available should they need it.

**Workshops**

As before, we specifically aimed the workshops at PPI staff working in research. We felt that this was necessary for participants to be able to speak openly. We advertised through our local and national PPI networks, and also personally invited some people who had previously expressed an interest.

We had initially planned for four 2-hour workshops with 20 places each, with two workshops held on Zoom and two held in London on King's College London premises near Waterloo station. However, the virtual workshops proved considerably more popular than we had anticipated (the 'complex' workshop was full in a few days and we soon had a waiting list of 21 people). We therefore decided to cancel the 'less complex' in person workshop which had under-recruited and to replace it with a third virtual workshop.

Overall, we had 74 people registering with very low attrition:

March 19th online (less complex) – 20 registered (20 came)

March 19th online (more complex) – 20 registered (19 came)

March 21st online (more complex) – 16 registered (15 came)

March 25th in-person (more complex) – 18 registered (16 came)

The workshops followed a similar format to the pilots: there was an introductory exercise, including breakout sessions. In some workshops attendees were asked what a PPI meeting looks like when it's going well, and then what difficult situations they had come across when facilitating PPI meetings; in other workshops after brainstorming some difficult situations, attendees were asked to consider the impact that difficult, upsetting or uncomfortable incidents can have on PPI contributors, PPI staff and the project itself.

This gave some context to the training and got people talking to each other in smaller groups. It also offered them the opportunity to share any personal experience of difficult situations if they wished to.

The session then moved into the forum theatre element, firstly setting the scene and introducing the characters, and then playing short videos of the relevant scenario: the online versions had videos of an online meeting while the in-person session had a video of an in-person meeting. Attendees then had the opportunity to rework how the PPI facilitator handled the situation and the scenario was re-enacted live with the different solutions acted out. The workshops ended with attendees sharing what advice they would give to the imaginary facilitator/themselves, and what they would take away from the session. These included:

'how you connect with people is the most important thing'

'start by acknowledging and helping people to feel heard, not with the project'

'there is no right or wrong, the best thing to do is always be compassionate with others'

'learning from experiences – you won't always nail it, so reviewing, reflecting and developing, and also owning the mistakes'

**Evaluation**

Following the workshops 38 participants filled in our feedback forms (54% of participants). (See the Appendix for the feedback form and a table of themes generated from the responses)

A strong majority of participants named the forum theatre process as the most valuable aspect of the workshops (28/38) while a significant number also mentioned the benefits of learning with and from others, the importance of community and of working together (18/38).

Fewer than half of participants filled in the 'least useful part' question (15/38). Of those that did, some reported that the early parts of the workshop (discussing challenges in PPI in small groups) were least useful (5/15).

The responses on desired improvements and take-aways gave us a clear direction on the potential usefulness of developing these workshops in the future. Here, only a small minority reported that they would have preferred a stronger orientation towards giving advice (3/36) – something that is antithetical to the whole forum theatre approach (forum theatre is about discovering the way forward collectively through acting out different solutions in a safe space). Many participants would have preferred either more time afforded to the workshop itself so that summing up could take place, or having the choice of a sequence of workshops so that several difficult situations could be addressed (15/36). Two participants suggested that this workshop needs to be adapted for researchers – a suggestion that was also made by some participants during the workshops themselves. Furthermore, a majority of participants took away clear learning on how to improve facilitation: they mentioned the importance of reading the room, giving space to and validating public contributors, and preparing well (22/36). Some also spoke of the value of the workshop in giving them validation and an understanding that their challenges are shared by others ('I am not alone') (9/36).

Overall, almost all participants either strongly agreed or agreed that they would recommend the workshop to their colleagues (36/ 37) while one of these also wrote that it felt incomplete (because of the lack of time to further analyse and comments on the re-worked scenarios).

Finally, many participants reported that there were benefits to in-person workshops (immersive quality, space for nuance and its provision of community and networking opportunities, the fact that there was no record of the conversations). Even so, those who had attended the virtual workshops (26/36) stated that they had enjoyed them and felt that they worked well, with some reporting that they would not have been able to attend in-person workshops due to funding and time constraints. Some interesting suggestions for combining the two modes were also made, including a suggestion for 'train the trainer' events – starting with a virtual workshop and then moving to regional in-person ones.

**Comparative work**

Following our workshops we met with University of Leeds colleagues Delia Muir (NIHR Involvement and Engagement Fellow) and Jessica Drinkwater (NIHR Doctoral Research Fellow) who had undertaken a similar project using forum theatre to reflect on the relationships in general practice Patient Participation Groups (PPGs). The forum theatre workshops, titled 'Whose Decision is it Anyway?' had been funded via an ESRC Impact Acceleration Account. Their evaluation findings overlapped with ours:

- participants valued forum theatre as a training methodology;
- they felt that it was important to explain what forum theatre entails in advance;
- they appreciated the importance of such interactive training for developing better facilitation in potentially uncomfortable meetings.

Notably, the University of Leeds team have produced a facilitator manual on how to use the videos and materials they created so that the training could be offered more widely. However, this has yet to be tested, partly due to concerns about the potential for things to go wrong if not facilitated appropriately, given the sensitivity of the topic.

**Conclusion**

In light of evidence from the feedback, our experience of the workshops themselves (all of which were attended by one or both of us) and the report on 'Whose Decision is it Anyway?', we believe that the workshops respond to a clear need in the PPI workforce, and that they do so in two ways.

Firstly, they address the workforce need for facilitation training, the highest need identified in our national survey of PPI leads in 2023. Both the fact that the workshops were filled almost immediately after they were announced and the lack of attrition corroborate this.

Secondly, by using forum theatre, the workshops provided a powerful and effective approach to training: they did not deliver tips and advice but instead acted out a challenging situation from PPI staff's own working lives, thus enabling participants to work together and generate a way forward themselves through collective problem solving. Our participants' enthusiastic feedback and their willingness to recommend the workshops to others testified to the power and distinctiveness of this approach. Their criticism and suggestions for improvement also pointed in the same direction:

- there were few to no concerns with the approach itself; instead participants valued the opportunity to meet and work with their colleagues
- a desire for forum theatre to have occupied a greater part of the workshop
- the opportunity to attend a series of facilitation workshops featuring different scenarios
- a suggestion that these workshops be extended to researchers and others.

The benefit of this training, both in its content and methodology, to PPI staff is clear. We believe that forum theatre workshops can be an effective and powerful means of delivering facilitation training and providing an opportunity for supportive group work – thus addressing some of the most urgent needs of the PPI workforce as identified by our survey. Furthermore, the work of our colleagues in Leeds demonstrates that forum theatre techniques are a flexible tool that can be used to address a number of challenges that may inhibit the meaningful embedding of PPI and community engagement in research, including the perdurance of power asymmetries. Equally, we acknowledge that in their present form, forum theatre workshops can be quite costly to design and deliver. However, we believe that there are ways to cut costs significantly without compromising on impact. We therefore would welcome the opportunity to work with CED to consider a way forward to offer it more widely.

# APPENDIX

View the feedback form here: https://forms.office.com/e/zN4eH9nQRr

FEEDBACK THEMES

38/70 participants gave feedback, representing 54% of participants

| MOST USEFUL PART 38 responses | LEAST USEFUL PART 15 responses | POTENTIAL IMPROVEMENTS 36 responses | TAKE AWAYS 36 responses |
|---|---|---|---|
| | | | |
| Forum Theatre: experiential, chance to influence and change a situation in real time, having distance in doing so (28) | What came before Forum Theatre: Introductory discussions long/unnecessary/repetitive (if attending both) (5) Breakout room activities lacked direction (3) | More time needed (15) -Longer duration of Forum Theatre Would like to have several workshops or scenarios Would have liked , more time to sum up and build on learning at the end | The skilfulness & emotional complexity of facilitation (22) • Importance of reading the room, being sensitive to and validating public contributors • Giving space to people's needs vs prioritising project needs • Importance of preparation and first principles |
| Learning from others, working together in this way (18) | Too many suggestions going on (incl. couldn't keep up on zoom) (3) | Comfort break needed! (4) | The importance of validation, learning from others 'I am not alone' (9) |
| | Room size – in person (2) | Would prefer a stronger orientation towards advice (3) | Better ways of dealing with and standing up to researchers (6) |
| | Facilitator somewhat dominating (1) | Participant suggestions could be more limited (3) | Making peace with one's limits and not expecting perfection (4) |
| | All was useful but unsettling (1) | Deliver to researchers and others! (2) | Will be using this in training (2) |
| | | Access issues (time of day, tech issues) (3) | |

VIRTUAL VS IN PERSON

36 responses

26 online participants

10 in person participants

Several advantages were presented for each mode

| ONLINE ADVANTAGES | IN PERSON ADVANTAGES |
| --- | --- |
| Accessible (because of funding/time constraints) | Atmosphere, networking, social support |
| Gives good geographic spread | Immersive |
| Is true to PPI meeting conditions (many are online) | Leaves no record – better sense of 'conversations staying in the room' (as opposed to eg lack of anonymity and insensitive comments on zoom chat) |
| More comments and ideas visible (chat etc) | |
| | |
| | |
| | |

Suggestions to get the best of both:

Use online sessions to 'train the trainer' on a national scale. New trainers could then set up smaller in person local sessions

In person workshops could be tagged onto other existing in person meetings (eg national PPI lead networks NCCPE to minimise expense/improve access)

WOULD YOU RECOMMEND TO OTHERS:

37 responded

35 – Enthusiastic positive responses

1 – yes, but the workshop felt incomplete

1 - 'I don't think it would work as well' (unclear what that meant)