

Organisation Name: **[Insert organisation name]**

Patient Participation Group Policy

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Position	Named individual
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Overview for all staff

- The Patient Participation Group (PPG) has a key role to play at this organisation as it helps to ensure that patients and carers can influence local services.
- All staff must understand the purpose of the PPG, who the PPG organisation lead is and be able to explain to patients how they can become involved with the PPG.
- There are two types of PPGs that can be established, one is a virtual group that meets online and the other is a physical face to face meeting. Both meet approximately four times a year.
- One of the roles of a PPG is to represent the patient population effectively, expressing the views of the population in an objective manner.
- PPG members must commit to confidentiality guidelines and sign a confidentiality agreement.
- Key PPG members have a job description, and a charter is made available to detail the purpose and requirements of this group.

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1 Introduction

1.1 Policy statement

The Patient Participation Group (PPG) has a key role to play at this organisation as it helps to ensure that patients and carers can influence local services. All staff must understand the purpose of the PPG, who the PPG organisation lead is and be able to explain to patients how they can become involved with the PPG.

This policy is to be read in conjunction with [CQC GP mythbuster 108: Involving and engaging with the patient population and local communities](#).

1.2 Status

In accordance with the [Equality Act 2010](#), we have considered how provisions within this policy might impact on different groups and individuals. This document and any procedures contained within it are non-contractual, which means they may be modified or withdrawn at any time. They apply to all employees and contractors working for the organisation.

2 PPG overview

2.1 Purpose

This organisation's PPG meets on a regular basis and its role includes:

- Working with the organisation while helping to ensure that patients and carers can influence their local healthcare services
- Being a critical friend to the organisation
- Advising the organisation on patient perspective and providing an insight into the responsiveness and quality of services
- Encouraging patients to take greater responsibility for their own and their family's health
- Carrying out research into the views of those who use the organisation
- Organising health promotion events and improving health literacy
- Regular communication with the patient population

Guidance can be sought from the [National Association for Patient Participation](#), [Patient Participation Groups in Scotland](#) and [Patient Participation Groups In Northern Ireland](#).

2.2 Establishing different types of PPG meetings

When considering a PPG, the set up can either be by having a face-to-face group or an online virtual group. Both are acceptable and the table at [Annex A](#) details how these different approaches should be established.

Further reading on establishing a successful PPG can be found in the Healthwatch guidance titled [Patient Participation Groups – A Best Practice Guide](#).

2.3 Structure

The organisation's PPG committee will be comprised of the following:

- Chairperson
- Vice Chairperson (if appointed)
- Treasurer (if required)
- Organisation representative

Additional positions may be created at the AGM if proposals are made. The committee are members of the PPG, selected by members of the PPG. **The group will not exceed 20 members**, who may be part of face-to-face or virtual groups, and each must be a registered patient at this organisation. Should an individual cease to be a registered patient, they will no longer be a member of the PPG.

Job descriptions for committee positions are at [Annex B](#) and a PPG charter is at [Annex C](#).

2.4 Membership

The PPG consists of a representative sample of the organisation population. To become a member of the PPG, the applicant must:

- Be a registered patient or a carer of a registered patient
- Remain objective, contributing to group discussions appropriately with the patient at the forefront of their mind
- Work in a collaborative manner with all group members
- Declare any potential conflicts of interests
- Listen to the views of group members
- Adhere to the terms of reference for PPG members
- Commit to upholding [The Seven Principles of Public Life](#)

Ordinarily, membership will be for an initial term of three years and is not restricted to those patients or carers who can attend face-to-face meetings. Members can contribute to discussions via the organisation's virtual PPG.

The personal details of PPG members will be stored electronically and in accordance with data protection guidelines.

2.5 Meetings

PPG meetings take place regularly and an agenda will be emailed to members by the secretary prior to the meeting, which will be in the following format:

Item no	Item	Lead
1	Welcome and apologies (for non-attendance)	
2	Approval of the minutes of the previous meeting (to be proposed and seconded)	
3	Matters arising from the last meeting	
4	Items for discussion (consider new members, local and national initiatives etc. and limit time)	
5	Any other business (an opportunity for members to voice patient/carer concerns/suggestions or compliments)	
6	Location, date and time of next meeting	

2.6 Role of PPG members

The organisation will encourage PPG members to:

- Liaise with patients and carers, discussing concerns and comments pertinent to the services at this organisation
- Champion the PPG, actively engaging with the patient population and local community
- Attend and contribute to meetings, sending apologies in advance to the secretary in cases of known absence
- Remain polite and objective throughout meetings, listening to and respecting other members
- Be constructive and balanced when contributing to PPG meetings
- Represent the patient population effectively, expressing the views of the population in an objective manner
- Undertake any training and development opportunities that may arise for the benefit of the PPG

A Confidentiality Policy and Declaration Agreement for PPG members can be found at [Annex D](#).

The Patients Association has produced a [PPG checklist](#) which can be used to review the current structure and effectiveness of the PPG before formulating an action plan to improve if necessary.

2.7 Contact with PPG members

To be compliant with the [Data Protection Act 2018](#) which incorporates the UK General Data Protection Regulation (UK GDPR) and the [Data \(Use and Access\) Act 2025](#) (DUAA 25), all members are required to give their consent for the organisation and key personnel to hold information about PPG members. This will be limited to name, address and contact details.

A UK GDPR email template that details compliance and requests PPG member consent can be found at [Annex E](#).

2.8 Additional resources

Further guidance on PPGs can be sought from [The Patients Association](#) or [Healthwatch](#). The organisation has a PPG presentation that can be shown to prospective members or interested individuals. Furthermore, a PPG poster to promote its activities is available.

Annex A – Different types of PPG meetings

Below details the differences that should be expected when establishing either a face-to-face PPG group or a virtual PPG group.

Both options have advantages and disadvantages and although whilst consideration as to the format of the group should be agreed when establishing the group, this can be dynamic as the PPG evolves and when considering bringing in new members.

Face-to-face	Virtual
Membership is to reflect the diversity of the patient population as closely as possible.	Dependent on the availability of the practice population, this organisation may establish a virtual group for patients who wish to support service improvement but are unable to attend in-person meetings.
Staff members who support the PPG must ensure that all members clearly understand the scope of the group, including what topics and actions are appropriate for discussion and which are not.	Should a virtual group be preferred, then the organisation will create a dedicated email address for PPG members to enable communication and consultation on topics affecting the practice.
Ground rules are to be agreed at the first meeting and referred back to when necessary. These will form part of the Charter (Terms of Reference) at Annex B.	Social media will be the preferred platform to engage and communicate with a broader patient audience.
Inadequate planning is a common cause of PPG failure, so it is essential to develop a clear action plan. Planning will include both short-term and long-term objectives, coupled with realistic timescales for completing any tasks.	An agreed video conferencing account will be established. This can be Teams or Zoom dependent on the preference of the majority of PPG members.
Meetings should generally last no longer than 90 minutes, unless members of the PPG have specifically agreed to extend the duration.	The Practice Manager will nominate a staff member to have the responsibility for maintaining regular contact with the virtual PPG. This person will ensure that members are kept informed about practice developments and changes.
The PPG will aim to meet at least four times per year (quarterly), although additional meetings can be arranged if agreed by the group.	As for face-to-face meetings, virtual meetings will aim to meet on a quarterly basis with meeting times also being within core GP practice hours.

Meetings are typically held at the practice at a time convenient for members. This will ordinarily be either afternoon or evening and may fluctuate between both to ensure maximum attendance with the wider PPG group.	Consideration will be given to fluctuating meetings between afternoons and evenings to ensure maximum attendance for the widest membership. As for face-to-face meetings, it is understood that this may not be the preferred option for each PPG member every time, although there is to be an agreement where times suit the most, and for all of the time.
Each meeting will include dedicated time for the practice to update PPG members on any service changes. Allotted time will also be given for patients to raise concerns or issues that may impact the wider patient community.	Virtual members should be invited to share feedback and suggestions via email on a regular basis in the same way they would contribute during in-person meetings.

Annex B – Job descriptions for PPG positions

The following key members will have the roles, duties and responsibilities indicated.

1. Chairperson/Vice Chairperson (if appointed)

Appointment/Role

- The Chairperson will be elected by the PPG members to serve for a period of [xx months] from the [date of meeting] as the first item on the agenda and may stand for re-election
- The Chairperson will stand down after a period of [xx] consecutive years and may not be elected for a further period of [xx months/years]
- If the Chairperson wishes to terminate their role before their elected time has concluded, they are to inform the PPG Secretary, copying in the Practice Manager in writing (an email will suffice)
- Any election will take place by a show of hands from those present at the meeting
- Nominations for the post of Chairperson must be supported by a proposer and a seconder at the meeting
- In the absence of the Chairperson, one of the other PPG members will be invited to chair the meeting
- The role of the Chairperson is to ensure that PPG meetings are conducted in accordance with the PPG's terms of reference

Duties and responsibilities

Duties and responsibilities may include but not be limited to:

- Setting the agenda in conjunction with the organisation and the PPG Secretary
- Welcoming new members and making introductions
- Introducing speakers
- Ensuring that the timing of the agenda is maintained
- Ensuring that each member has an opportunity to speak and controlling the meeting
- Ensuring that contributions will always be non-political and non-sectarian, respecting diversity and exemplifying the PPG's commitment to the principles contained within the [Equality Act 2010](#)
- Ensuring that meetings are conducted in an orderly manner and the ruling of the Chairperson is final on such matters

Qualities

It is desirable that the qualities of a good Chairperson should include:

- Previous experience in the role of Chairperson
- Leadership skills
- Assertiveness
- Being respected and active in the community
- Good at networking
- Diplomacy, tact and consideration for others

2. Secretary

Appointment/Role

- The Secretary will be elected by the PPG members to serve for a period of [xx months] from the [date of meeting] as the first item on the agenda and may stand for re-election
- The Secretary will stand down after a period of [xx] consecutive years and may not be elected for a further period of [xx months/years]
- If the Secretary wishes to terminate their role before their elected time has concluded, they are to inform the PPG Chairperson, copying in the Practice Manager in writing (an email will suffice)
- Any election will take place by a show of hands from those present at the meeting. In the event of a tie, the Chairperson will have the deciding vote
- Nominations for the post of Secretary must be supported by a proposer and a seconder at the meeting
- In the absence of the Secretary, one of the other PPG members will be invited to act as secretary to the meeting
- The role of the Secretary is to assist the Chairperson in ensuring that PPG meetings are conducted in accordance with the PPG's terms of reference

Duties and responsibilities

Duties and responsibilities may include but not be limited to:

- Deputising for the Chairperson or Vice Chairperson at meetings in the event of them being unable to attend or resigning. This may continue until a replacement is elected
- Upholding the PPG's terms of reference
- Working with the PPG Chairperson and appropriate organisation staff to ensure relevant PPG documentation is circulated to PPG members in a timely and appropriate fashion prior to any PPG meeting in accordance with the PPG's terms of reference
- Working with the PPG Chairperson and relevant organisation staff to review all PPG documentation (e.g., meeting minutes and reports) to ensure that this is accurate and appropriately reflects the work of the PPG and that these are, when appropriate,

displayed prominently on a notice board at the organisation and on the organisation's website

- With the assistance of the Practice Manager, providing an email address whereby patients can contact the Secretary to raise matters of importance. When patients contact the Secretary, he/she will subsequently discuss this with the PPG Chairperson and they will collectively agree the appropriate course of action
- Ensuring that the PPG letterbox, which is positioned in the [insert location], is emptied once a week and that any correspondence is brought to the attention of the Chairperson and, when appropriate, to the attention of PPG members at the next meeting
- Providing a brief induction to all new PPG group members (e.g., an explanation of how the PPG works and ensuring the new member signs the relevant paperwork)

Qualities

It is desirable that the qualities of a good Secretary include:

- Previous experience in the role of Secretary
- Well organised
- Good at note taking
- Punctual
- Ability to write clearly and concisely with a good command of the English language
- Good IT skills

3. Treasurer (only required if the PPG is involved in fund raising activities)

Appointment and role

- The Treasurer will be elected by the PPG members to serve for a period of [xx months] from the [date of meeting] as the first item on the agenda and may stand for re-election
- It is expected that the Treasurer will have an accounting qualification and/or considerable experience of bookkeeping and accounting
- The Treasurer will stand down after a period of [xx] consecutive years and may not be elected for a further period of [xx months/years]
- If the Treasurer wishes to terminate their role before their elected time has concluded, they are to inform the PPG Chairperson, copying in the Practice Manager in writing (an email will suffice)
- Any election will take place by a show of hands from those present at the meeting. In the event of a tie, the Chairperson will have the deciding vote
- Nominations for the post of Treasurer must be supported by a proposer and a seconder at the meeting
- In the absence of the Treasurer, one of the other PPG members will be invited to stand in for the Treasurer at any PPG meeting

- The role of the Treasurer is to assist the Chairperson in ensuring that the finances of the PPG are properly accounted for and all receipts and payments are made in accordance with the PPG's terms of reference

Duties and responsibilities

Duties and responsibilities may include but not be limited to:

- Ensuring all PPG financial transactions are properly recorded in manual or electronic form
- Ensuring all transactions are supported by the appropriate and relevant purchase order, invoice or receipt
- Ensuring bank statements are reconciled monthly and that the account is kept up to date and presented to the PPG meeting for scrutiny as a standing agenda item
- Ensuring petty cash is properly accounted for and that receipts and payments are signed by the recipient or payee
- Ensuring any cheques are banked promptly
- Ensuring PPG accounts are audited independently at least once a year and when handing over to a successor

Qualities

The desirable qualities that a good Treasurer should possess are:

- An accounting qualification
- Well organised and numerate
- Good IT skills are desirable

4. The organisation representative

The organisation will provide a representative to the PPG whose role and responsibilities will be:

- To support the Chairperson and other PPG members
- To provide inductions for the PPG so all can fully understand their roles and responsibilities
- To provide introductions at the first PPG meeting

Annex C – Charter

The Patient Participation Group Charter

1. Group structure

- 1.1 [Insert organisation name] PPG will consist of no more than [xx] members drawn from the patient population at this organisation. Any member who leaves the organisation as a patient ceases to be a member of the group immediately.
- 1.2 The group will be comprised of officers and patients of the organisation with the following committee positions:
- Chairperson
 - Secretary
 - Treasurer (if required)
 - Organisation representative

Other positions may be added as deemed appropriate at the Annual General Meeting.

2. Meeting frequency and attendance

- 2.1 The PPG will meet on a [insert frequency] basis; meetings must have in attendance at least [four] members if they are deemed to be quorate. To maintain momentum within the PPG, any members who fail to attend [x] meetings consecutively will be asked if they wish to continue to actively participate in the group. If not, they will be asked to resign.
- 2.2 Meetings will be planned to not be for any longer than 90 minutes. This can be extended should the PPG committee deem it appropriate, although this will be an exception.
- 2.3 Committee members will meet [x] times per year (usually one week before each quarterly meeting) for planning purposes [delete if not applicable].
- 2.4 Members are requested to adhere to the following etiquette:
- Submit apologies for non-attendance prior to the meeting
 - Be punctual
 - Be willing to voice opinions and contribute to discussions
 - Be able to attend meetings regularly
 - Promote the PPG
 - Read agendas and papers in advance of meetings
 - Be polite, objective and constructive in discussions and be aware of the [Equality Act 2010](#) and [Data \(Use and Access\) Act 2025](#) in those discussions
 - Be proactive and positive to both the PPG and the organisation
 - Be prepared to lead on agenda items
 - Be polite and respect the views of others
 - Turn off their mobile phone unless needed in an emergency
 - Acknowledge the vote of the majority and, should the vote be tied, that the Chairperson may exercise the casting vote (optional)

3. Face to face and virtual PPGs

- 3.1 This organisation will operate a face to face and virtual PPG. Both are intrinsically linked and members of both groups will adhere to these terms of reference and sign the PPG Confidentiality and Declaration Agreement as detailed at [Annex C](#).

4. Aims of the PPG

- 4.1 The aim of the PPG is to establish and embed an effective relationship between the organisation team and the patient population, communicating patient experience, concerns, suggestions, comments and compliments in an objective manner.
- 4.2 The PPG will work collaboratively with the organisation, on behalf of the patient population, ensuring the services of the organisation meet the needs and wishes of the patient group.
- 4.3 The organisation agrees to work collaboratively with the PPG on behalf of the patient population ensuring the members listen to feedback, concerns, suggestions, comments and compliments in an objective manner, taking the necessary action to improve services where applicable.
- 4.4 PPG members will act as the information conduit between the organisation and the patient population and the wider community, ensuring that all parties are aware of any issues or initiatives which affect or are likely to affect patients.

5. Specific activities

- 5.1 The PPG will obtain feedback from the patient population about the services delivered by the organisation. Members will review the feedback, informing organisation staff accordingly and identifying areas for improvement. This information will then be relayed to the patient population.
- 5.2 The PPG will promote the organisation at every opportunity, helping the community to understand the range of services available. In addition, members will promote online services, encouraging patients to register for such services.
- 5.3 The PPG will maintain a prominent presence online and within the organisation such as displaying pertinent information within the patient waiting areas. Additionally, the PPG will meet with the patient population opportunistically, gathering information for feedback as well as promoting the services of the organisation.
- 5.4 The PPG will be involved in all areas of organisation development, relaying patient feedback and/or concerns and promoting organisation and ICB led health initiatives wherever possible.
- 5.6 The PPG will liaise effectively with organisation staff, sharing information regarding issues that may affect both patients and staff while relaying issues identified by staff in order to improve service provision or raise patient awareness.

6. Committee responsibilities

- 6.1 In addition to the above, the Chairperson is responsible for:
- Ensuring meetings are held on a regular basis

- Facilitating the AGM
- Ensuring all committee and group members adhere to the terms of reference

6.2 The Vice Chairperson is responsible for:

- Supporting the Chairperson throughout his or her tenure
- Deputising for the Chairperson in periods of absence
- Ensuring committee members are aware of their roles and responsibilities

6.3 The Secretary is responsible for:

- Producing the agenda at least one week prior to the quarterly meetings
- Taking and issuing the minutes of the quarterly meetings
- Retaining a record of all decisions made at meetings
- Retaining all PPG meeting administration effectively and securely

7. Signatures

Signed on behalf of the organisation

Signature	
Print full name	
Date	

Signed by the PPG Chairperson

Signature	
Print full name	
Date	

Annex D – PPG confidentiality and declaration agreement

[Insert organisation name] Patient Participation Group

Confidentiality

All information held at the organisation is deemed confidential and this includes hard copy and electronic formats. Volunteers have no direct access to confidential information held by the organisation. This particularly relates to patient identifiable information.

Access to patient information can only be sought if the patient is agreeable to this. In these instances, written permission must be given by the patient.

Should a volunteer overhear confidential information when volunteering as an active PPG member, the Practice Manager must be notified at the earliest opportunity. The matter must not be disclosed to any other person or parties.

Definitions

- Confidentiality is a set of rules that limits access or places restrictions on the use of certain types of information. It is usually executed through confidentiality agreements and policies
- Safeguarding means protecting a citizen's health, wellbeing and human rights enabling them to live free from harm, abuse and neglect

Induction of PPG members

All members of the PPG will be provided with an induction by [insert responsible person here]. The induction will include this confidentiality policy and will reiterate its importance to both patients and staff.

The PPG member will also be briefed on the PPG confidentiality policy which outlines the key responsibilities of the group. [insert responsible person here] will ensure that the PPG member is committed to agreeing to this policy and understands the confidentiality guidelines.

The PPG member will be briefed on the consequences of breaking this policy and be made aware of the legal implications of breaking the [Data Protection Act 2018](#) and/or [Data Use and Access Act 2025](#).

Responsibilities

Safeguarding issues are to be reported immediately to the Practice Manager.

All information relating to organisation staff and patients is considered to be confidential. This includes verbal, documented and electronically stored information and data.

Any unauthorised disclosure will be considered to be a breach of confidentiality. This will result in disqualification from volunteer status and may involve law enforcement if deemed appropriate.

Confidentiality guidelines for PPG members

Activities in relation to your work in the PPG should be discussed only with authorised staff. This should be on a 'need to know' basis. These discussions will be held with the utmost of discretion and in a private setting. Confidential information should never be discussed in public. This includes public meetings.

Requesting information from a patient in the waiting room should be discreet and, if in doubt, speak to the Practice Manager about obtaining a private room.

Patients should be given privacy to complete questionnaires to ensure that their answers are held with discretion. Questionnaires should be in the custody of and accountable to the PPG member once complete.

When using electronic devices, care should be taken to ensure that other conversations within the organisation cannot be accidentally transmitted at the same time.

Ensure that passwords and logins for authorised computer systems are protected at all times. Do not use private computer devices to store organisation, patient or staff data and ensure that confidential waste is disposed of in the most appropriate manner.

For the avoidance of doubt, contact the Practice Manager for details.

PPG members will not:

- Behave contrary to the guidelines/best practice stated above
- Disclose confidential information to any unauthorised persons
- Copy confidential information for any unauthorised use or reason
- Remove confidential information from the organisation premises
- Take custody of confidential information when not authorised to do so

Summary

This policy applies to all volunteer members of the PPG at this organisation. Volunteers are considered to be individuals who are not employed by the organisation and have no contractual responsibilities.

Signatures

I confirm that I have briefed the PPG member signed below in accordance with the Confidentiality Policy and Declaration Agreement for Volunteers.

Signed on behalf of **[insert organisation name]**:

Signature	
Print full name	
Date	

I agree to adhere to the PPG Confidentiality and Declaration Agreement.

Signed by the PPG member:

Signature	
Print full name	
Date	

Annex E – PPG UK GDPR email template

The following is a template to highlight that the organisation will meet the legislative compliance in maintaining UK GDPR compliance and to further obtain the agreement and consent of the PPG members.

The wording can be amended to suit.

Subject heading: Patient Participation Group – Agreement for the practice to contact you.

As a practice, we want you to understand that we are fully compliant with the current data legislation regarding maintaining a register of limited personal data about you and we will comply with the [Data Protection Act 2018](#) which incorporates the UK General Data Protection Regulation (UK GDPR) at Chapter 2 and also the [Data \(Use and Access\) Act 2025](#) (DUAA 25). The data will be name, address and contact details.

As a valued member of the Patient Participation Group, we would like to continue to ensure you receive all the latest information in relation to PPG matters.

If you consent, we will continue to send you relevant information about the practice PPG and invitations to meetings or linked events. You can opt out of receiving such emails at any time **[and our emails will always include an opt-out option]**. You have the right to withdraw your consent at any time. The practice privacy notice **[insert hyperlink]** explains how we use your information.

To consent, please reply to this email, replacing the subject heading with:

PPG consent – Your Surname

If we do not hear from you, we will send a further email within **[30 days]**. If we still do not hear from you, in accordance with the UK GDPR we will not send any further information to you unless you contact the practice and request we do so.

Any questions relating to this email are to be directed to **[insert name]** at **[email address]**.