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**‘Best Patient Care, Clinical Research and You’ Guide for NHS Trust staff**

Standard Operating Procedure

Version: 0.3

April 2021

**1. Document control**

This document is issued and updated by the ‘Best Patient Care Clinical Research and You’ national collaboration comprising NHS England, NHS R&D Forum, UKRD, NIHR CRN. Readers should ensure that the latest version is being viewed. On receipt of a new version, please destroy all previous versions.

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| **Document Information** |
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**Section 1- Document purpose**

 **1.1 Background**

Experience shows that whilst significant inroads have been made to develop clinical research activity in NHS care there remain equally significant challenges. These challenges largely stem from a long historic separation between how research and care are driven which affect culture and attitudes not compatible with modern strategic outlooks for evidence based medicine and care. This is further exacerbated by sometimes intense resource pressure in NHS organisations to deliver care.

Given that there is a strong patient centred research infrastructure that has been built up in the UK over the last 15 years, and the improvements to patient outcomes and staff satisfaction, incorporating research more widely in the NHS is now recognised nationally as a priority, including through the Department of Health and Social Care’s vision and strategy for UK Clinical Research Delivery. However there is a need to make space for research support in the NHS to realise optimal impact on best patient care now and in the future.

Knowledge of clinical research is important for all staff to have but it is patchy and often fraught with misplaced assumptions. That research is everybody's business is not a common perception, and it is this that the Best Patient Care, Clinical Research and You guide has been developed to help address.

The guide is designed to be easy to use for NHS trust staff and help fulfill the requirements on NHS care regarding research in respect of the NHS 10 Year Plan, the CQC Well Led Framework and the NHS Constitution. Concept and core content for the guide have largely been developed in a partnership between the NIHR NHS Engagement Team, the NHS R&D Forum, UKRD and NHS England.

The key concept behind ‘Best Patient Care, Clinical Research and You’ is that the guide is easy to access, and quick and engaging to use by all levels of NHS trust staff and management. The deployment of the guide is therefore as important as its content which aims to raise awareness of how each NHS trust role influences clinical research and the simple steps they can take that help assist its integration in their trust. The guide will therefore be hosted locally on NHS trust staff intranets which both enable localisation of some content whilst maintaining the integrity of core content. Therefore the deployment, ongoing management and oversight of the guide can only be realised through a clear understanding and agreement about the responsibilities of a range of organisations and internal teams.

 **1.2 Purpose**

It is expected that the guide will benefit:

* Individual staff in understanding their role relationship and interdependencies with research in their NHS trust and further, if they are interested points them to further information and potential professional development opportunities in research
* NHS Trusts in fulfilling statutory requirements in integrating research
* NHS R&D teams in delivering research in their organisations
* The NIHR to build capacity for research locally and nationally
* Improve patient choice about research in terms of the opportunity to take part in research that is relevant to them.

The guide does not attempt to be a fix all, but is designed to be an important component in wider awareness raising of research in the Trust care system. To realise these benefits the purpose of this SOP is to assure its good management throughout.

 **1.3 Scope**

The SOP describes the key responsibilities of the different teams and organisations involved in both content and deployment management and national oversight of ‘Best Patient Care, Clinical Research and You’.

**1.4 Key principles**

Throughout, the key principles of the guide must be maintained:

* Easily accessible to all NHS trust staff
* Easy and quick to use, providing basic information with signposting to optional in-depth information relevant to the different NHS trust staff and management roles
* Core nationally agreed content balanced with additional local content within clear tolerances.
* Continuous improvement of the guide going forward.

**Section 2- Standard Operating Procedure: Trusts**

**2.1 Summary**

The deployment of the guide across a network of organisational facilitators and users at a range of levels means it is imperative that there be good controls in place for content, formatting, navigation and supporting operational and strategic infrastructure.

**2.2 Trust governance**

It is important that there is full and ongoing oversight of the set up of the guide and once set up, the continuous improvement of the guide through experience of its use by staff and its connections to other related functions and activities in the Trust e.g. Workforce development, HR, Communications, R&D team, IT etc..

Oversight, review, reporting and update planning for the guide should be standard procedure and there should be a recognisable body that has this function irrespective of individual staff changes over time. It is therefore recommended that such a body is established as early as possible at set up stage and once the guide is set up this body should meet at least once every 6 months to review.

**2.3 Content Management - Trusts**

**2.3.1 Content quality control**

Trust R&D, IT and Communication teams will ensure that content is uploaded within the requirements of the national guide protocols reflected in the content templates. Required national content must be uploaded within layout tolerances of the local platform used and internal branding guidelines whilst maintaining the national content integrity. Additional local content may be added at appropriate points. This may be internal contacts and resources information, and links to relevant local examples and initiatives already in place. The way the guide is set up on the internal intranet should closely reflect the principles in 1.4. On occasions there will be national updates of the guide in the form of changes to the templates and Trust R&D Teams will be notified of these and expected to implement these updates within the Trust intranet.

**2.3.2 Intellectual Property**

Core content described in the guidance templates as ‘required’ or ‘optional’, is for general use but remains the intellectual property of the NIHR CRN, NHS R&D Forum and UKRD and should be associated with appropriate acknowledgement/badging. Where this content is used outside the ‘Best Patient Care, Clinical Research and You’ guide (e.g. in leaflets, newsletters, books, induction handouts or on other sites) the source should be acknowledged.

Local content remains the intellectual property of the individual Trust hosting the guide.

**2.3.3 Navigation**

Whilst it is appreciated that local intranets/workforce sites may have certain styles and restrictions, navigation within the guide should generally follow that required in the national templates. Variations for technical reasons should be based on solutions negotiated with your R&D team. Navigation to additional internal content including use of new sub pages is encouraged but should not detract from or confuse the required navigation which is designed for simplicity and speed of use by Trust staff.

**2.3.4 Branding**

It is expected that the Trust will use its own branding colours, banners and badges and this helps non research staff to recognise that the guide is relevant to them and reflects local ‘ownership’ of the principles in it. Additional acknowledgement of the national organisations behind the core content is also required. The following table provides the branding information:

|  |  |  |
| --- | --- | --- |
| **Organisation** | **Badging/Acknowledgement** | **Special requirements?** |
| NHS Trust | Badged as per Trust protocol | Where required by Trust protocol |
| NHS England | Acknowledgement | No but suggest footer on home page |
| NHS R&D Forum | Acknowledgement | No but suggest footer on home page |
| UKRD (UK R&D leaders) | Acknowledgement | No but suggest footer on home page |
| NIHR CRN  | Acknowledgement | No but suggest footer on home page |
| NIHR LCRN | By local agreement where/if appropriate | No |

Text for the acknowledgement of the organisation involved in developing national content should be as follows:

**<ADD>**

**2.3.5 Content management**

Content should be as required nationally (as agreed by the partnership NHS England, NHS R&D Forum, UKRD and NIHR CRN). Page templates (online and document) show an illustration of suggested content context and specify the required content. The templates also indicate where additional local content can be added. Occasionally required content will be updated along with the templates and notification of this will be given. Templates present written content in an easily copied form.

Local content can be added but not outwith the original principles, purpose or approach of this guide. Consideration should be given to use of local images, content signposting, Trust facilities naming, Trust twitter feed. It is also suggested that local case studies could be added as blogs or video material either on additional pages or as links.

**2.3.6 Monitoring usage**

There should be the capacity to record page hits if at all possible. This information is important for publicising and improving the guide locally as well as nationally.

**2.3.7 Image Management and use**

The images shown on the templates are there to illustrate potential basic layout options. The specific images are not required content. Rather, use of locally recognisable images and graphics is encouraged provided that full permission has been obtained from any persons who feature in the images, in line with General Data Protection Regulations.

**Section 3- Standard Operating Procedure: National Team**

 **3.1 Summary**

The deployment of the guide across a network of organisational facilitators and users at a range of levels means it is imperative that there be good controls in place for content, formatting, navigation and supporting operational and strategic infrastructure. It is therefore necessary to maintain a national operational oversight group which meets on a regular basis. There will be a number of factors to consider for the ongoing continuous improvement of the guide as a going concern.

 **3.2 Procedure for national operational oversight group**

**3.2.1 Core content quality control, review and improvement**

Overall quality of content needs to be maintained to a high standard including its relevance, ease of use, accuracy, navigation and coherence from the user point of view. In recognition of the changing NHS care and research environments and ongoing user feedback content will need regular review, updating and improvement. The national operational group must ensure that diarised reviews are in place, and actions recorded. Frequency of reviews need to reflect the rate of change in the respective environments in NHS care and research at any given period of time. Each update should have a nomenclature for identification and to track its implementation and feedback from Trusts.

**3.2.2 Deployment systems quality control**

Operational aspects of the dissemination of the guide content through Trust R&D channels and on to staff intranets/sites used by the Trust workforce need careful oversight that goes hand in hand with content quality control. For consistency there needs to be assurance that core content updates are actioned in each Trust and there is a feedback loop to this effect. Each update’s nomenclature will be the basis for logging implementation locally and nationally. The national operational oversight group will assess the quality and consistency of the dissemination and provide support to individual Trusts which need it to meet the standards.

 **3.3 Procedure for document and template hosting organisation**

**3.3.1 Definition**

There are two types of template which support the guide:

* **Content Templates** refer to guide page templates providing both required and suggested/guided content including text, images and layout
* **Navigation Templates** refer to the way the pages are expected to be linked to each other on an interactive intranet.

**3.3.2 Template Management**

Current templates will be hosted on the NHS R&D Forum website resources section and will be in a form that is readily downloadable by Trusts. Templates need to be attributed to visible version control nomenclature consistent with that mentioned in 3.2.1.

**3.3.3 Gathering feedback**

The R&D Forum will collect feedback from Trusts (via R&D Teams) concerning issues of content and deployment. Feedback is to be curated for use by the **national operational oversight group** for the purpose of their reviews.

**3.4 Content Management - national**

It is not expected that the guide will need extended overhauls whilst the core top level messages remain relatively simple. However, more detailed background information available in the guide is likely to need updating from time to time based on the following factors:

* Feedback from individual guide users and their Trust organisations
* The context of the changing health research and care landscape and culture in the UK.
* Pragmatic information changes and new information becoming available
* New national tools and reports becoming available
* Material changes to tools, sites, and external information linked to the guide and the usability of the links themselves.
* Changing permissions on images used in the guide mock up, page guides or in an image library

To ensure content is under review the national operational oversight group should undertake in depth annual content reviews and routine checks every 6 months. The oversight group will:

* Keep a change log which is readily available to all participating Trusts
* Provide notification of any updates requiring Trust action
* Arrange for guidance templates to be updated

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