**Case study – People’s Panel: Involving people in choosing service -**

People’s Panels put community members right at the heart of choosing services. Members are recruited from the community to take part in the procurement of a commissioned service. Panel members review tender documents, develop questions and interview potential providers and their views directly inform the contract award decision. Panel members are fully supported to take part, and this may include providing some training and development and ensuring the process is accessible and inclusive.

**How does it work?**

*Case Study - Independent Advocacy Service, Summer 2021*.

The CCG has a duty to provide an independent advocacy service for people in our area—this is part of our responsibility for local Adult Social Care services. Advocacy services help vulnerable people access information and services, be involved in decisions about their lives and speak out about issues that matter to them.

The current advocacy service was launched in October 2015 after a ‘People’s Panel’ was formed to help the CCG to decide which tender was going to give the best service for the people in our area.

As a People’s Panel had been used when the service was commissioned previously the Service Lead, Leigh Holton decided early on that he wanted to work with a People’s Panel of service users and community members on this procurement. Previously the Panel had met in person and conducted the interviews at a community venue. However, this time the whole process was undertaken digitally.

**Recruiting People Panel members**

We wanted to ensure that the Panel was reflective of our community and had lived experience of the challenges vulnerable groups face when navigating the health and care system. We were able to bring a group of people together from the Accord membership and community networks who wanted to take part. Some had been involved previously in Panels for others it was their first time.

It is important that Panel members understand that their involvement will include reading documents, taking notes and scoring. One of the first things we needed to do was find out what support people would need to participate. We also needed to ensure people understood the time commitment required – this is not easy as you don’t know how many tenders you are going to get back!

**Preparing the Panel to take part**

Panel members were asked to sign a confidentiality agreement and declaration of interest forms as the group will be party to commercially sensitive information. We held two planning meetings on Teams with members of the Panel with the offer of more if required. Panel members where also given contact details and encouraged to get in touch with us if they needed any help or had any questions. At these meetings we went through the timetable and set the criteria for scoring the information that will be provided to them by the tenderees.

We also went through some ‘do’s and don’ts’ with members:

* Read the submission at face value and score on the basis of the information provided only (don’t read between the lines or make assumptions)
* Please don’t use prior knowledge of the bidder to sway your scoring. Legally we are not allowed to use any prior knowledge of bidders to influence the scores or decision-making process, so please block this out when undertaking your evaluations.
* Score your tenders independently at your own speed. You must not liaise with other panels members at this stage this is done later went you all meet to agree a `consensus score.
* Make a note of areas that are unclear for that you would like clarifying
* Ensure full notes for scoring is provided for each question. This is vital. Not only will this act as a reminder of the reasoning behind your score during the panel meeting to agree the final scores (post interviews), it will also assist with providing feedback at the end of the procurement process.

**What does the Panel evaluate?**

A professionals panel carried out evaluation of the tender documentation relating to the specification and legal, financial and commercial information.

The peoples panel looked at the summary document the bidders were asked to submit describing their service specifically for the People’s Panel. Panel members then scored independently against the criteria they have previously agreed.

We then brought the Panel together on Teams and discussed the bids and reached consensus on a score. Next, we developed three questions/scenarios to ask at interview. These were then shared with the bidders so they could prepare their responses.

**What happens on interview day?**

We came together on Teams half an hour before this first scheduled interview to make sure everyone was happy with the format and the technology was working well. There were two tenders for the Advocacy Service – each of them were given 10 minutes to present information about their service as outlined in their summary then speak to the three scenarios provided. Panel members were then given an opportunity to ask any supplementary questions which were noted in line with procurement rules.

**Making the decision**

After the presentations members were asked to write up their notes and send them in to us.

Scores from both Panel’s were then combined by the Contracts & Procurement Team and final scores calculated. Both Panel’s kept the outcome confidential until a “standstill” period had been observed, in line with procurement regulations.

The two Panel’s don’t confer at all during the actual process, as it is important that there is a clear separation during the procurement process. After the contract award we get together to discuss lessons learned to help plan for future.

**What is it like being part of a People’s Panel?**

Clair Brooks - Senior Contract Officer, NELCCG - *As a member of the Contracts and Procurement Team I have been in involved in People’s Panels over the past 4 years. These have proven invaluable in ensuring the procurement process is inclusive of all sections of our local community. The insight and different perspective Panel members have brought to the discussions have ensured the correct balance of professional and community input. In my experience, People’s Panel members very often pick up on nuanced aspects of service delivery.*

*Furthermore, formal and informal feedback from People’s Panel members has allowed the CCG to review and refine our procurement procedures and ensure the entire process is robust and fit for purpose.*

Dave McGuire – community member - *‘I enjoy doing the People’s Panels because you get information on the service that is requiring a renewal of the contract by provider.*

*You then look at the application tender and work out what questions you want to ask them to ensure that they are giving the best service for the people of North East Lincolnshire*

*This time we used the Microsoft Teams platform to meet as a panel and then interview the organisations rather than meeting face-to-face. We had worked on three scenarios that each company had to answer during their presentation to the People’s Panel.*

*As a Panel we then scored each of the bidding organisations based on their tender application and presentation and passed the score on to the CCG, who added them up and then they declared the winner after adding our score to the scores from the other stages of the process.*

*This system proves that the public voice matters, and we can make a difference with our vote.*

*If you get a chance to work on the people’s panel, I would suggest that you take it!*

Jonathan Brooks, Engagement Deputy Manager, NELCCG – *For us as an Engagement Team, People’s Panels are the top level of public involvement, putting community members & service users at the heart of decision making. The Panel members bring a different perspective to the discussions and question providers on areas which are of great importance to the local community. During the pandemic we have adapted our People’s Panels and hosted them virtually on Microsoft Teams which has worked really well and helped us to involve people around their existing commitments such as work, study or caring, whereas, a face-to-face meeting may have not been accessible to them. In recent years we have worked with Panel members who have required additional support to allow them to be involved – we’ve facilitated this by sourcing advocates that work with people who have a communication need, to ensure that they can be fully involved in the process. It has been brilliant to see People’s Panels working so effectively as a team and with the CCG.*