Norfolk and Suffolk NHS
NHS Foundation Trust

Title:	**Designing New Information Products and Obtaining Ratification**
Outcome Statement:	Information products provided for service users, carers and others will meet National and Trust requirements and have been formally approved for use.
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Reviewed By:	Michael Lozano – Patient Safety & Complaints Manager Caren Maidment – Clinical Effectiveness Lead Frances Martin – Patients' Advice and Liaison (PALS) Officer Sharon Hadley – Assurance Lead
Approved By & Date	Clinical Effectiveness Lead – December 2011
With Reference To:	Standard 4, Criterion 1: Patient Information. NHSLA Risk Management Standards (2011/12) NHS Brand Guidelines for NHS Foundation Trusts. Department of Health (2008) Making Written Information Easier to Understand for People with Learning Disabilities. Department of Health (2010)
Associated Trust Policies/Documents:	Q14: Development, Management, Ratification and Monitoring of Policies Q14b: Designing Clinical Forms and Obtaining Ratification C16: Health Records Records Management (Health Records area on LINX) 'Reference Guide to Producing Marketing Materials' and 'Marketing Material Production Guide' (both Marketing and Communications area on LINX)
Applicable To:	Trust-wide
For Use By:	All Trust staff
Reference Number:	Q14a
Version:	01
Published Date:	January 2012
Review Date:	July 2013
Impact assessment:	May 2009
Reason for Review:	Developments in practice and to reflect publication of revised NHSLA standards. Planned review as part of policy harmonisation for Merger 1st January 2012
Implementation	Use of the 'Checklist for Approving Information Products' to ensure that information products meet the required standards. Routine distribution procedures (publication on the Trust intranet, email notification to identified senior staff for distribution throughout the team and inclusion in the weekly Trust Update e-bulletin).

1. Introduction
Norfolk & Suffolk NHS Foundation Trust is committed to providing information and choice about the care and treatment it provides. The marketing team have led work to create an identity for the Trust that is distinctive and modern. It is important that all information products carry the Trust's brand and uphold the high standards which have been developed by the marketing team.

2. Purpose
2.1 To provide guidance to staff on the standards required for a Trust information leaflet

2.2 To detail the process of development and the pathway to ratification which must be followed prior to the information product being put into use.

2.3 To ensure that information products are not brought into use until the process and approval are complete.

3. Definitions
Information products may be in a variety of media, for example:

- Leaflets
- Posters
- Cards
- Bookmarks
- Magnets
- Drinks Mats
- Any other marketing or communications materials

If staff are unsure about any type of proposed information product, advice should be sought from PALS / Clinical Effectiveness Team prior to commencing development.

4. Duties

Staff (Originators) will ensure that

- Trust approved information is given to service users, carers and others
- There is consultation with PALS when a new information product is proposed, prior to commencing development
- Draft information products meet the requirements set out in this policy
- Funding availability is agreed by the budget holder (where required)
- There is appropriate consultation on content (i.e. those who have specialist knowledge)
- Draft information products are sent to PALS for distribution to the Readers' Panel
- Comments/feedback from the Readers' Panel and the approving group is taken into consideration and where appropriate, the information product is amended
- They (or nominated deputy) are available to attend the meeting where the information product is being considered for approval so as to receive comments and answer queries
- Out of date information products are withdrawn

Managers (Team/Locality/Service) will ensure that

- Only information products that have been approved via Trust process (this policy) are available in their areas (in collaboration with the PALS team)
- They confirm the need for the information product with the originator
- Funding to cover the production costs is identified and obtained
- Where funding is not immediately available this is recorded as an unmet need and a risk assessment is carried out
- Staff working on information products contact PALS for support and advice
- Ensure leaflets are available for service users and that where these have run out, request from appropriate department e.g. PALS, pharmacy, etc.

Patients' Advice and Liaison Service (PALS) will

- Advise on the existing products within the Trust and of any associated costs in obtaining a new one
- Arrange for specialist advice where easy read information products are required for people with learning disabilities
- Distribute draft information products to the Readers' Panel and provide their feedback/comments to the originator
- To attend Clinical Effectiveness meetings where information products are presented for approval
- Provide feedback to the originator where an information product is not approved
- Arrange for approved information products to be obtained, distributed and published on the intranet (unless otherwise agreed between PALS and Locality/Service)
- Maintain an **archive** of all Trust approved information products in accordance with the Records Management policy. This will include details of the date the product was released, review date, version number and the originating individual/service
- Maintain a database of all current information products. This will be checked periodically to ensure that information is 'in date' and remains relevant. Should this not be the case, they will ask the originator to review/withdraw the information product
- Submit the database annually to the Clinical Effectiveness Group for review
- Ensure the PALS resource room has adequate leaflets for service users/carers.
- Contact the wards on a monthly basis to ensure adequate leaflets are available for service users
- Up-Load to the intranet, copies of information produced by other agencies (which is only available in electronic format)

The Readers' Panel will

- Support the process of producing Trust approved information products by providing feedback early in the development process
- Provide feedback/comment on the draft information product (E.g. how straightforward and easy to understand it is, is it jargon-free, professionally presented and respectful to the reader etc). They <u>are not</u> responsible for checking adherence to National/Trust documents/guidelines etc
- Provide feedback to PALS (usually within 10 working days) on a draft information product

Clinical Effectiveness Group and Locality/Service Governance Groups will

- Complete a 'Checklist for Approving Information Products' for each item sent to the group for approval/ratification
- Advise the originator and PALS of the outcome (Chair's responsibility)
- Review the Trust Approved Information Products Database annually (Clinical Effectiveness Group) to ensure that information is relevant and up-to-date, and that there are no gaps in provision. Where review/withdrawal of an existing information product, or development of a new one is required, the Chair will discuss with PALS

Archiving

An archive of all approved information products is maintained by the PALS team. An Excel database holds details of each information product. Both electronic and hard copies are held by the PALS team.

Use of Information Leaflets – Guidance to Good Practice

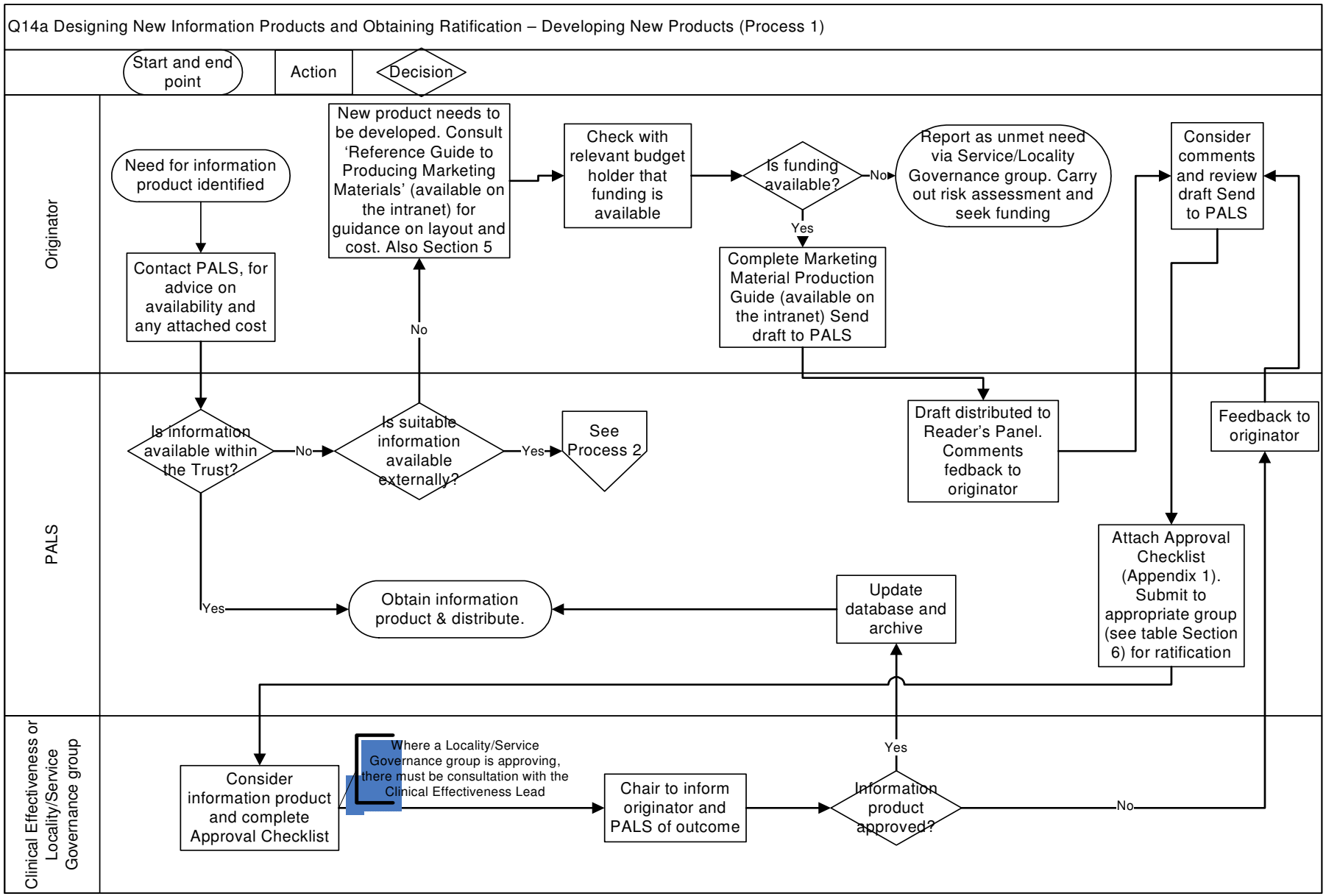
Information products should be used to support informed choice or to reinforce information given by clinical staff.

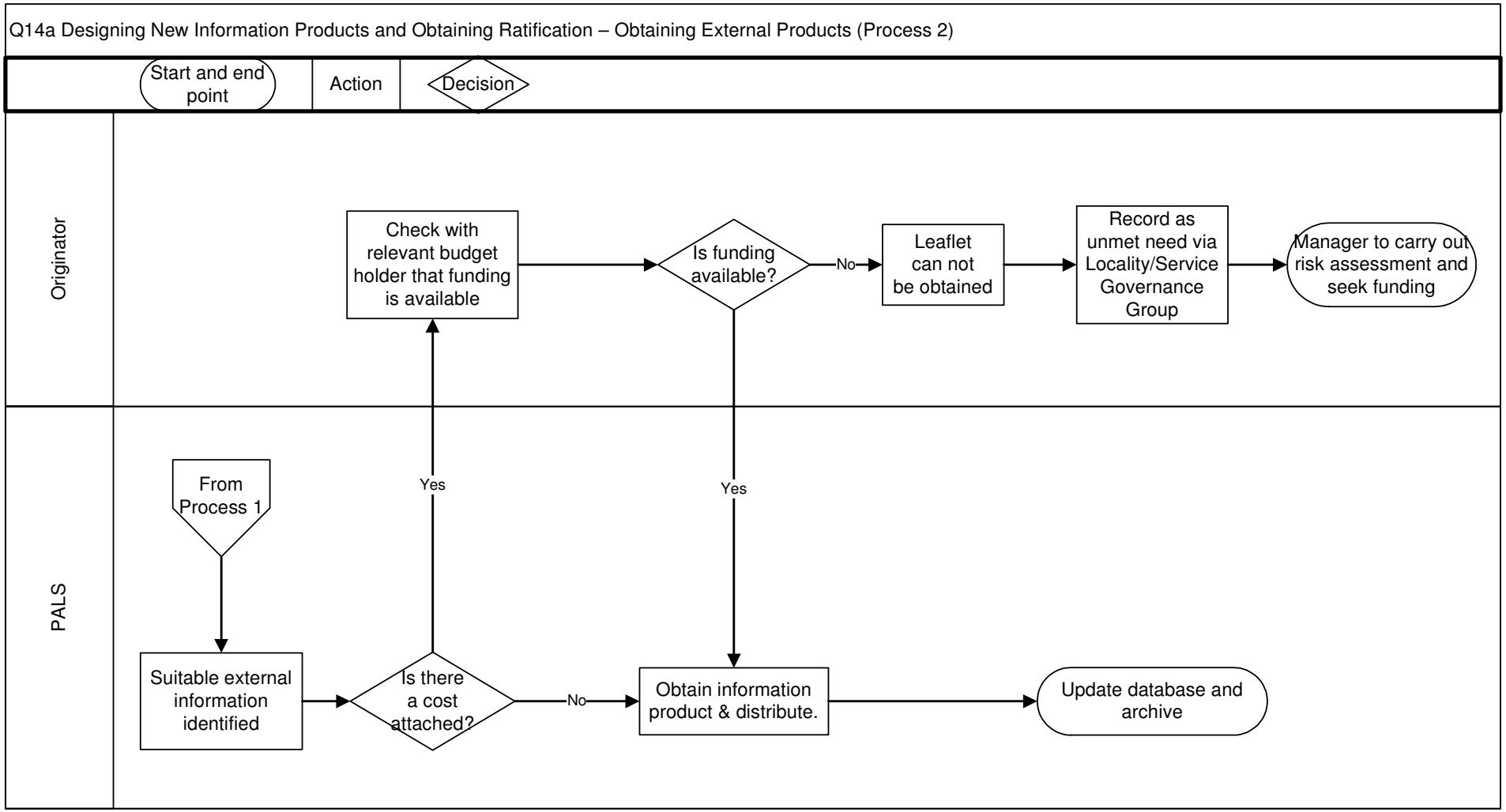
If an information leaflet is given to a Service User, this should be recorded in the health record.
Where discussion has taken place this must be clearly identified.(for example decision to resuscitate leaflet)

Some information products are given out as part of the recovery pack. This may be documented as the recovery pack given to the service user unless specific discussions have taken place.

Where information leaflets provided by other organisations are only available in electronic format, these will be available on the Trust Intranet and may be printed directly using the networked colour printers.

Where a small print run is required (50 or less) because of low usage, these may be printed as required using the networked colour printers. However the development and ratification process, including Trust branding must be followed.


Q14a Designing New Information Products and Obtaining Ratification – Developing New Products (Process 1)
Start and end point
Action
Decision
Originator
PALS
Clinical Effectiveness or Locality/Service Governance group
Need for information product identified
Contact PALS, for advice on availability and any attached cost
Is information available within the Trust?
No
Is suitable information available externally?
Yes
See Process 2
No
New product needs to be developed. Consult 'Reference Guide to Producing Marketing Materials' (available on the intranet) for guidance on layout and cost. Also Section 5
Check with relevant budget holder that funding is available
Is funding available?
No
Report as unmet need via Service/Locality Governance group. Carry out risk assessment and seek funding
Yes
Complete Marketing Material Production Guide (available on the intranet) Send draft to PALS
Draft distributed to Reader's Panel. Comments fedback to originator
Consider comments and review draft Send to PALS
Feedback to originator
Attach Approval Checklist (Appendix 1). Submit to appropriate group (see table Section 6) for ratification
Yes
Obtain information product & distribute.
Update database and archive
Consider information product and complete Approval Checklist
Where a Locality/Service Governance group is approving, there must be consultation with the Clinical Effectiveness Lead
Chair to inform originator and PALS of outcome
Yes
Information product approved?
No


Q14a Designing New Information Products and Obtaining Ratification – Obtaining External Products (Process 2)
Start and end point
Action
Decision
Originator
PALS
Check with relevant budget holder that funding is available
Is funding available?
No
Leaflet can not be obtained
Record as unmet need via Locality/Service Governance Group
Manager to carry out risk assessment and seek funding
From Process 1
Yes
Yes
Suitable external information identified
Is there a cost attached?
No
Obtain information product & distribute.
Update database and archive

5. Information Product Design

5.1
The need for a new information product should be established before starting work on designing something new.
The following prompts should be considered

- Why is the information needed?
- Is it necessary?
- How many are needed?

Information products developed by organisations such as Mind, National Institute for Health and Clinical Effectiveness (NICE), Royal Colleges, Rethink, Alzheimers Society, Age UK and many others are usually of a high quality and evidence based. PALS are able to advise and assist in obtaining copies of leaflets etc. (there may be a cost for some).

5.2 Content & Design
For further information, contact the PALS team

Consideration should be given to

- Who will be using the information product?
- Using everyday language and avoiding jargon.
- Avoid using acronyms. Where it is necessary the full title should be written in the text followed by the acronym in brackets. E.g. National Institute for Health and Clinical Excellence (NICE). Thereafter the acronym may be used
- Ensuring that information is relevant.
- Being "date proof" (i.e. state contact telephone numbers and addresses and use job titles instead of names).
- Information for people with learning disabilities must conform to Department of Health guidance (Making Written Information Easier to Understand for People with Learning Disabilities. Department of Health, 2010). If information is needed, PALS should be contacted as they will contact an approved specialist provider
- Readers Panel comments
- Cartoons should not be used

5.3 Standard Features to include

- Information should comply with the Marketing Material Production Guides. This will ensure that details such as the version number, dates of publication and review are given. The originator (Department/Service – not individual names) should be given as well as the PALS contact details.
  Templates are available on the intranet:
  Home → about the Trust → Support Services → Marketing and Communications → Marketing → Reference guides for producing materials.
- If the information refers to a treatment, the content **must** include reference to the risks, benefits and alternatives (Standard 4, Criterion 1: Patient Information. NHSLA 2011/12)
- All information products should use 'Arial' font and have a minimum font size of 9. The expected standard font size is 11.
- Acknowledgements of other organisations work and include supporting references for further information.

7. Ratification (Approval)

At the final draft stage ratification should be sought. PALS will submit the information product to the appropriate group (see table) with a 'Checklist for Approving Information Products' attached.

Type of information	Approving group
Information about a condition	Clinical Effectiveness Group/Acute Services Forum/ ECT Forum/Service Governance sub Committee
Information about a treatment / therapy	Clinical Effectiveness Group/Acute Services Forum/

	ECT Forum/Service Governance sub Committee
Information for use Trust wide	Clinical Effectiveness Group/Acute Services Forum/ ECT Forum/Service Governance sub Committee
Information connected to a C or Q policy	Clinical Effectiveness Group/Acute Services Forum/ ECT Forum/Service Governance sub Committee
Service specific	Locality or service governance group
Ward information	Locality or service governance group
Local events	Locality or service governance group

Monitoring Statement - Designing New Information Products & Obtaining Ratification

Aspects of the policy to be monitored	Monitoring method	Individual/Team responsible for monitoring	Frequency	Findings: Group/Committee that will receive the findings/monitoring report	Action: Group/Committee responsible for ensuring actions are completed
Archiving arrangements for information given to patients	Review of all information products that are listed in the database held by PALS.	Clinical Effectiveness Lead (Chair of the Clinical Effectiveness Group) PALS	Annual	Clinical Effectiveness Group via meeting minutes. Clinical Effectiveness Lead's quarterly report to Service Governance sub-Committee	PALS Clinical Effectiveness Group Service Governance sub-Committee
Content and design of information products	Audit of completion of the 'Checklist for Approving Information Products'	Clinical Effectiveness Lead	Annual	Clinical Effectiveness Group via meeting minutes. Clinical Effectiveness Lead's quarterly report to Service Governance sub-Committee	PALS Clinical Effectiveness Group Service Governance sub-Committee
Process for documenting discussion and provision of information to patients	Audit	Clinical Audit Team	Annual or as identified within the audit schedule	Audit report to localities. SGSC quarterly audit report as appropriate	Localities recommendations followed up by the clinical audit team Quarterly reports to SGSC and A&R

Checklist for Approving Information Products (Q14a)		
Name of Group:		
Date of Meeting:		
Title of information product:		
Originator:		
Please delete as appropriate:		
Is the information product needed?	Yes	No
Explain:		
Could an existing information product be modified?	Yes	No
If yes, give details		
Readers' Panel		
Has the information product been reviewed by the Readers' Panel?	Yes	No
Have comments been taken into consideration?	Yes	No
Give details:		
Essential Content		
Has a suitable Marketing Material Production guide been used?	Yes	No
If the information product is about treatment/therapies, does it contain information on:		
• Risks	Yes	No
• Benefits	Yes	No
• Alternatives	Yes	No
Language		
Is everyday clear language used? Comments:	Yes	No
Does it contain abbreviations and/or anachronisms?	Yes	No
If yes, please specify		

Presentation			
Font (Arial)	Yes	No	
Font size (No less than 9)	Yes	No	
Front Cover			
Trust Logo	Yes	No	
Other (please state)	Yes	No	
Title	Yes	No	
Locality/Service (if area specific)	Yes	No	N/A
Back Cover			
Trust website address	Yes	No	
Copyright note	Yes	No	
Intran logo	Yes	No	
PALS address and contact details	Yes	No	
Details of originator/Locality/Service	Yes	No	
Version number	Yes	No	
Date of publication	Yes	No	
Date of review	Yes	No	
Review date			
Funding identified	Yes	No	
Approval			
Information product (delete as appropriate): **Approved** / **Approved Subject to amendment*** / **Not Approved*** *Give details of amendments required/rationale:			
Name and title of Chair:			
Date:			

On completion, this form should be filed with the minutes and agenda items of the approving committee