



Checklist for induction and training of CCG lay members

Lay members bring an essential independent perspective to the clinical commissioning group (CCG) governing body – being separate to the day-to-day running of the organisation means that they can see it as it is seen from the outside. This checklist from the NHS Clinical Commissioners (NHSCC) Lay Members Network is the second in a series looking at different aspects of the lay member role.

To allow lay members to play their role as part of the CCG governing body and maximise their potential for the benefit of CCGs, it is important that they are provided with a comprehensive orientation and induction programme. This checklist provides some guidance to CCGs.

ORGANISATIONAL INDUCTION

- ✓ Has a one-to-one with the chair or accountable officer been organised? This should clearly outline the responsibilities of the lay member role, and include chairing responsibilities as well as meeting and committee attendance. It should also cover formal/informal support, expectations and personal objectives, and induction and development needs.
- ✓ Have introductory meetings been organised between the incoming lay member and accountable officer, chair, corporate directors, clinical directors and other governing body members? These meetings can help frame the lay member's role and duties.
- ✓ Has training been organised on information governance, safeguarding, equality and diversity, CCG working practices, organisational structures, NHS finances and CCG governance arrangements?
- ✓ Has the incoming lay member been given an overview of relevant national regulatory frameworks and organisations, such as NHS Improvement, NHS England and the Care Quality Commission?
- ✓ Has IT equipment been arranged, as well as software training and IT support for remote working?
- ✓ Does the lay member have access to key documents such as the CCG's strategy, annual reports, as well as terms of reference and past minutes of the committees they are expected to attend?
- ✓ Does the lay member have access to all the publications and trade journals used by the CCG?

MENTORING AND BUDDYING

- ✓ Has the incoming lay member got a buddy? Buddying with another member of the governing body would be helpful to ensure a smooth start for the lay member.
- ✓ Has the incoming lay member been assigned a mentor? NHSCC has a list of mentors who can help.



NETWORKING

- ✓ Is there a local/regional network of lay members which the incoming member can join for support?
- ✓ Have you ensured the lay member is registered with the NHSCC Lay Members Network to receive bulletins and invitations to relevant events?
- ✓ Has the lay member been registered with the relevant NHS England network? There are networks for PPI lay members, audit chairs, and a heads of primary care network, which is a source of information about primary care.

ONGOING AND FURTHER TRAINING

- ✓ Is the incoming lay member aware of the mandatory training requirements from the CCG?
- ✓ Has the CCG considered the practicalities around the lay member completing online induction training? This can be difficult to access from a personal laptop or computer.
- ✓ Have you considered the individual development needs of the lay member? For example, could they benefit from training in NHS finances, the basics of good governance, how to effectively challenge, etc?

ADDITIONAL RESOURCES

The organisations below can help with induction and training for lay members.

- **NHS Clinical Commissioners Lay Members Network:** To join or find out more go to www.nhsc.org or email office@nhsc.org.
- **NHS England Patient and Public Participation** www.england.nhs.uk/participation
- **HFMA Chair, Non-Executive Director and Lay Member Faculty**
www.hfma.org.uk/our-networks/faculties
- **The King's Fund** www.kingsfund.org.uk
- **NHS England networks:** To join or find out more, contact the networks by emailing the following:
 - england.ppilaymembers@nhs.net (PPI lay members)
 - england.auditairs@nhs.net (audit chairs)
 - england.primarycareops@nhs.net (NHS England heads of primary care network)