DARE UK

Public member recruitment guide

Good practice guidelines for recruiting public members to groups and activities

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UK Research and Innovation

HDR UK Health Data Research UK

ADR UK Data-driven change

Public member recruitment guide

Good practice guidelines for recruiting public members to groups and activities

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1. Background & purpose

This guidance is intended to support in recruiting public members to groups and activities in your programmes, projects, and communities. The guidance covers the entire recruitment process, from planning to onboarding.

We've created this guidance for teams and organisations undertaking or funding data research projects, community groups, and activities, but it is also applicable to those leading research projects and programmes of work outside of this area. Please note that this guidance is not a set of rules. Tailor your recruitment process to the community/ies you want to involve.

1.1. Definitions

The term 'public' covers a "broad range of people, including the general public, patients and professionals working across different sectors" (PEDRI, 2025).

Public involvement is defined as the active involvement of public members in the development, running and management of research projects and activities (NIHR, 2024). Examples of involving the public throughout a research project include being involved in decision-making groups, involved in data collection or analysis, and co-presenting research findings.

Public engagement describes a purposeful set of activities designed to promote an ongoing dialogue with the public about a topic, driven by active listening and responding (ADR UK, 2021). Examples include public dialogues, discussions at science festivals, and community surveys.

At DARE UK, we refer to the foregoing collectively as public involvement and engagement (PIE), as the terms are interrelated and sometimes used interchangeably.

1.2. DARE UK's commitment to public involvement and engagement

DARE UK is committed to meaningfully involving the public in all aspects of the programme to ensure that the public are central to the programme's vision, and they contribute to all activities and are involved in decision-making. One of the seven key outputs from the DARE UK Phase 1 Recommendations report was the need to proactively and consistently practice transparency to build trust and foster public participation. Based on this recommendation, DARE UK established the *Demonstrating Trustworthiness* workstream in Phase 1 to embed PIE in all aspects of the programme.

DARE UK shares its commitment to PIE with all programme partners and collaborators, including funded and commissioned projects. In Phase 2 of the programme, DARE UK aims to deepen this commitment by strengthening its PIE strategy through community-led initiatives, relevant public dialogues and strategic partnerships.

DARE UK's community groups initiative has further strengthened our PIE commitment. Community groups are required to involve the public in their activities as group co-chairs or public contributors.

1.2.1. Public Engagement in Data Research Initiative (PEDRI) Good Practice Standards

PEDRI is a sector-wide partnership bringing together organisations that work with data and statistics to generate insights that can inform policy and practice. DARE UK is one of the founding members of PEDRI and we are committed to embedding PEDRI's Good Practice Standards across the programme. The Good Practice Standards aim to support researchers and PIE professional to conduct meaningful PIE related to the use of data for research and statistics. These standards are intended for everyone involved in conducting, building infrastructure or supporting PIE activities. We encourage you to embed these standards throughout your work, including your recruitment processes.

1.3. Importance of involving the public

There is growing evidence that meaningful PIE can improve the quality of projects and programmes by ensuring that they address public needs. Including the public in activities and decision-making boards or advisory groups can help to build the public's trust in the project/programme's outputs and decisions, as people can see their voices reflected in the process.

Where possible, it is important to include diverse public perspectives throughout the project/programme that reflect the opinions of the public. This includes diversity in terms of race, gender, socio-economic status, sexual orientation, disability and other characteristics.

1.4. Public member roles

There are generally three roles a public member may have:

- Chair/Co-chair: The role of a chair or chairperson is to help meetings run smoothly and efficiently, while ensuring the group stick to the agenda and the purpose of the meeting is achieved. The chair leads the meeting and ensures everyone has their say. Two people in the meeting can sometimes have this role, they are called co-chairs. This could be a public member and a professional, or two public members.
- Group member: This is where the public member will sit on either a decision-making board or advisory group and actively engage in discussions and debates from a public perspective. They may contribute to discussions based on their lived experience.
- Participant: This is when a public member participates in an event or activity (or series of activities) on a one-off basis, typically out of interest or by invitation.

2. Recruitment process

2.1. Planning

2.1.1. Make a clear schedule

Outline clear deadlines throughout the recruitment process (application deadline, shortlisting dates, possible interview dates, possible start date). It's important to bear in mind that recruitment does not always go to plan, so build in time to consider alternative approaches in case you need them.

Think about who will be involved in the recruitment process. Who will be involved in shortlisting and the interview panel? If you are already working with members of the public, you should invite them to sit on the interview panel. You must make deliberate efforts to conduct an open and equitable public recruitment process.

2.1.2. Identify how many public members you want to recruit

The number of public members you need to recruit will be based on the needs, size, and resources of your organisation. Ideally, you should recruit at least one public member to your programme/project's groups and activities. However, we encourage you to involve as many public members as possible based on the need and your available resources. Involving more public members means diverse public perspectives and encourages peer support among public members.

2.1.3. Create a role profile

For organisations and the public to work together effectively, it is important to establish and clearly communicate roles, responsibilities and expectations. These should be stated in the role profile. Below are some ideas for what to include in your role profile. You do not need to include all of these, tailor the profile to your role. A role profile template can be found in the appendix.

- Provide a brief introduction to the organisation and its mission, and outline the project(s), activity/ies or group(s) the public member(s) will be involved in. This information may be captured in a Terms of Reference document, which may be linked to the role profile (e.g. HDR UK Public Advisory Board Terms of Reference). If a Terms of Reference document is not yet available, think about co-producing one with the public or existing members before advertising the role.
- Clarify their role and responsibilities. What will you expect from them in the role? What meetings and events are they expected to attend? How frequent are these meetings/events, and how long are they? Will they be involved in a post-project evaluation?
- Specify the experience, interest and knowledge needed and/or desired for this role. For example, interest in public data privacy and use, previous experience sitting on advisory or decision-making groups, strong knowledge of PIE in research, and understanding of sensitive data research.
- Highlight the support you will offer them in the role. For example, onboarding support, training and induction sessions, regular meetings with PIE Lead(s)/staff, and offering opportunities for feedback.
- Provide information on incentives that will be offered. If they will be paid in this role, clarify how much, how they will be paid (e.g. bank transfer, vouchers, etc.), and any processes they need to complete to receive their payment. Incentives will need to be provided in line with the HDR UK PPIE Honoraria and Expenses Policy.
- Highlight the importance of diversity and inclusion. You could do this by linking to your organisation's equity, diversity and inclusion commitment (e.g. HDR UK's statement) and encouraging applications from underrepresented groups. Include an Equal Opportunities policy statement if it is a requirement of your organisation.
- If available, signpost to your organisation's relevant Code of Conduct (e.g. HDR UK Public Contributors Code of Conduct).
- State the number of roles available and how long their involvement or group membership will be.
- Make sure to write your role profile in plain language. Writing in plain language means you are clear and concise and avoid jargon/technical terms where possible (further information on how to write in plain language).
- If you are already working with public members, ask if they want to contribute to writing the role profile.

2.1.4. Application process

In the details of the involvement opportunity, provide information on how to apply (e.g., email or phone you with an expression of interest on how they meet the criteria/why they are applying, or provide an application form with a few questions). An expression of interest form template can be found in the appendix. Do not make the process too onerous, as it will deter some potential applicants. Also, state relevant important dates, such as the deadline for applications and when they can expect to hear back from you.

Some people may need support with submitting their application, so it is important provide the contact details of a named individual who can answer questions related to the application process as well as the role. In addition to this, you could offer drop-in sessions which potential applicants can register for to ask questions about the role and the application process.

2.1.5. Collecting demographic information

You may want to collect the demographic information of those who are applying for the role. The reason for collecting this information and how it will be used must be stated, as well as how it will be stored and for how long. One reason to collect this data is to assess your public member diversity and inform your advertising methods for future recruitment rounds. Also, highlight that the information will not be shared with the interview panel alongside their application, and it will be anonymous. Completing these questions must be optional. Equality, Diversity and Inclusion in Science and Health (EDIS) have useful guidance to support you in developing these questions: Diversity and Inclusion Survey (DAISY) Question Guidance.

2.2. Advertising

2.2.1. Aim for diversity

When looking for general public perspectives, actively seek to recruit people across the four UK devolved nations from various backgrounds, identities and life stages, such as different countries of origin, residence, ethnicity, age, education, career level and income brackets, among others. The best way to do this is by using a variety of methods. Examples include:

- Engage community organisations, advocacy groups, charities, and people (including public members) in your current network, and ask them to share the opportunity with their members and networks. They may ask for flyers or other communications materials to easily share with their contacts.
- Post flyers via online community boards and at community centres, where feasible.
- Attend community events where the opportunity exists to speak about your work and share the opportunity.
- Use social media to share and promote the opportunity.
- You could hire an insights and research agency to engage people and organisations on your behalf, if you have the means to finance it.

2.2.2. Engaging and inclusive materials

Posting a plain document likely won't attract that many people to the role. You could produce leaflets that provide a summary of what is in the role profile and then link out to the full version (for e-leaflets). Try to avoid leaflets being too text-heavy; reserve the topline information for the leaflet and encourage those who are interested to ask further questions if they need clarification.

Make sure to use images and colour to make it look more inviting. You could also create content (graphics or video) specifically for social media detailing the role. Make sure to use plain language across all these materials, and ensure the materials are accessible and easy to read. An example e-flyer can be found in the appendix.

2.3. Shortlisting and interviewing

2.3.1. Outline your shortlisting criteria

Ensure that those involved in the shortlisting have had input into the shortlisting criteria and agree on how you will score the criteria. Usually, this is on a scale of 0-3 or 0-5 for each criterion. If you are already working with public members, you should involve them in writing the shortlisting criteria.

2.3.2. Respond to all applicants

Make sure to respond to everyone who has applied. Poor communication can stop people from applying for future opportunities with you. If you have many applications, you could send a generic email to those who are not successful, letting them know and add a statement such as "Due to the high volume of applications (or overwhelming interest in the opportunity), we are unable to provide feedback at this stage." If you can provide feedback, you could add a statement such as "If you would like to receive feedback on your application, please get in touch."

2.3.3. Agree on interview questions and scoring

Ensure that those on the interview panel have had input into the interview questions and how they will be scored. If you are already working with public members, you should involve them in writing the interview questions as well as sitting on the interview panel.

Alongside the interview questions, it would be helpful to also include a scoring grid with space for interviewers to take notes for each candidate (example interview questions and scoring grid). Taking notes throughout the interviews will help with providing structured feedback to unsuccessful candidates,

2.3.4. Plan for accessible interviews

When you invite someone to interview, ask if they have any accessibility needs or require any support to help them be at their best in the interview. Examples include providing questions in advance, ensuring interviewers' faces are well-lit and mouths are not covered, and, if meeting in person, using an accessible venue and room.

2.3.5. Consider drop-in sessions for applicants invited to interview

If you have the resource available, you may want to consider hosting 'drop-in sessions' for applicants who have been invited to interview. These sessions provide an opportunity for applicants to ask questions about the recruitment process and find out what an 'ideal candidate' looks like. This approach can help to streamline communication and reduce the need to respond to individual emails or arrange separate calls.

Involve public members you already work with as they will be best placed to answer questions on what to expect and how best to prepare for interview.

2.3.6. During the interview

Try to make the interviewee as comfortable as possible. Outline what will happen in the interview at the start (e.g. number of questions that will be asked, any convenience breaks if available, etc.) and provide an overview of the role. At the end of the interview, tell them when they can expect to hear from you.

2.4. Selection

2.4.1. Provide an opportunity for feedback

Ask those who didn't get the role if they would like feedback on their interview. You could provide feedback over the phone or via email; ask to find out what they would prefer. Examples of emails for successful candidates and unsuccessful candidates can be found in the appendix.

2.5. Onboarding

2.5.1. Plan for induction sessions

After recruiting public members, it is important to schedule induction or introductory sessions with them. These sessions allow you to check that they are clear on their role, responsibilities and expectations and to discuss any access and support needs they may have. It is also important to discuss the incentives offered (amount, process and processing times), how you will communicate and how often, and any meetings or training they may need (e.g. how to use online meeting software). Highlight who they can get in touch with if they have any questions.

At these induction sessions, share the Terms of Reference and code of conduct relevant to your organisation, project, community group, or team (e.g. DARE UK complies with HDR UK's Public Contributors Code of Conduct and safeguarding policy).

If hiring multiple public members, you may need to offer multiple induction sessions held at different times to allow people to attend.

2.5.2. Offer support options

When discussing support needs during the induction sessions, you may want to suggest a few options. Examples include:

- Hosting briefing sessions before meetings to allow the public members to ask questions about the agenda.
- Hosting debriefing sessions after meetings to allow the public members to give their feedback on how the meeting went and ask questions.
- Provide a mentor where possible. This is usually another public member who has been involved in activities or sat on the decision-making board or advisory group for a longer time and can provide support to the new public member.
- Conduct a training needs analysis to highlight areas of development where they may wish to gain new knowledge or skills (training needs analysis example).

2.5.3. Completing required forms

You may require new members to complete organisational forms before they can join the first meeting, for example, a conflict-of-interest declaration, confidentiality agreement, or a finance form so they can receive payments. Check this with your organisation.

2.5.4. Plan for introductions

At the first group meeting, ask the chair to allow time for all members to introduce themselves. They should encourage the professional members to introduce themselves in plain language (talk about their job role in an accessible way).

3. Keeping people engaged

After the recruitment process and first meeting, you will want to ensure that you keep your public members engaged. Keeping people engaged means that they are less likely to lose interest and drop out of the group, and it has the benefit of allowing them to see the project/programme progress over time. There are different ways you can keep people engaged:

- Ensure you provide regular opportunities for feedback or reflection. Public members can provide feedback on their experiences and where there might be room for improvement. You can give feedback on the public members' contributions and signpost to training if needed/interested.
- If possible, keep in touch between meetings to provide updates on items that were discussed at the meeting. Otherwise, set expectations of when they are likely to hear from you (i.e. quarterly or every two months).
- Make sure that public payments are made promptly. If it takes months to receive payments, this will put people off.
- Identify and communicate other ways they can be involved in your work, for example, attending events, co-presenting at conferences, co-creating project materials, etc.

4. End of membership

The process for ending a person's group membership should be stated in the group's Terms of Reference. The length of their membership should be agreed between the team and public member ahead of joining the group. If the timeline or the work of the project changes, check with people whether they would still like to be involved.

A public member's membership may come to an end usually because of three reasons:

1) Time has naturally come to an end. For instance, they were recruited to participate in an activity or group for a specific period, and that period has ended.
2) The person decides to leave the group. This can happen for many reasons. If it is because of a negative experience, talk to them to find out how and whether you could improve their experience.
3) The person is not actively contributing to or attending the meetings. Try to get in touch with them for a one-to-one meeting to find out the reason why. If they are no longer interested, see if there are any changes you could make which would improve their experience or give them the option to opt-out. If it is because of a health or confidence issue, work with them to find out what they need to allow them to contribute effectively (e.g. reasonable accommodation, training, etc.). If they are not attending, attempt to contact them and highlight the issue. If there is still no response after multiple emails and/or calls, send them an email stating that as there has been no contact from them, they are no longer a member of the group.

When a person's membership comes to an end, make sure to thank them for their contributions. You could also signpost them to other roles if they are still interested in getting involved in some way. Another option is to provide an opportunity for them to talk to you about their experience being a member, highlighting what they have achieved and their contributions to the project.

5. Appendix

5.1. Role profile template

<Group name> - Role profile

Overview of the project/programme and role

- Provide a short overview of your project/programme:
    - What is the focus of your work?
    - What do you aim to do?
    - Why is it important?
- What is the purpose of the group or activity they will be joining?
- Who else is involved in the group or activity?

In this role, you will be required to...

- What activities will the public member be involved in?
- What meetings are they expected to attend and where will they take place?
- Are they expected to do any preparatory work in advance of these meetings or activities?
- Do they need to declare any conflicts of interest?
- Examples include:
    - Attend and actively participate in monthly meetings.
    - Contribute in a constructive and thoughtful manner to give your opinoin and advice as a patient, carer, or member of the public on topics like <add relevant examples>.
    - Actively participate in training and other meetings as agreed in advance.
    - Prepare for each meetin by reading any paperwork required.

Experiences, skills and interests we are looking for...

- Are there specific criteria the person needs to meet? You could divide it by ”Knowledge and/or experience of”, ”An interest in” and ”Other attributes”.
- Examples include:
    - Working as a patient or public representative or wanting to gain more experience in this area e.g. public contributor of a research funding committee or steering group for research project.
    - Able to read and absorb complex information (seeking clarity through key contact and/or through own research), challenging jargon and offering plain English alternatives.
    - Good communication skills and able to listen and respect differing opinions.
    - An interest in the role of data and research in improving health and healthcare for patients and the wider population.
    - Willingness to learn about health data science and the language and terminology used.

Length of the role

- How long will they be in the role?
- Is there an opportunity to extend their tenure?

Location

- Where will meetings and activities be held? If they are being held online, what software is used (e.g. Zoom)?
- Will they be required to travel?

Time committment

- How much time are they expected to commit to this role? Consider the length of meetings and the different activities they will be involved in.

Honoraria and expenses

- Will people be paid for their time and if so, how will they be paid (cash, bank transfer, vouchers)?
- Are there any restrictions on who is eligible for payment?
- Will support be given in relation to how payment may affect a person's benefits?
- Will travel and other expenses be covered?

Support that will be offered

- What support will the project/programme team offer to public members? For example, will there be support from the PIE Lead, an induction meeting, and/or will any training be offered?

How to apply

- Provide information on how to apply for the role (e.g. expression of interest, application form).
- Include important dates such as deadline for applications, drop-in session dates, interview dates, induction session date, and date of first meeting.
- Provide the email and telephone number of a named contact who can provide support on the application process and answer questions about the role.

Additional information

- You can include your organisations Equal Opportunities Policy Statement.

5.2. Expression of interest form template

<Group name> - Expression of interest form

If you have any questions or need help completing the form, please email <name> at <email address> who will be able to help.

Name:
Email address:
Telephone number:
Please tell us why you are interested in joining the <group name>. Up to 250 words.
Please tell us what you think you can bring to the <group name>, referring to "Experiences, skills and interests" outlined the role profile. Up to 500 words.
Are there any dates or times that we have outlined in which you are unavailable? *Provide a list of important dates relevant to recruitment process e.g. induction sessions, first group meeting.*
Do you have any need or existing/regular commitments we should be aware of? This will only be used by our team to support you throughout the recruitment process and provide ongoing and tailored support if you are successful in getting this role.

When you have completed the expression of interest form, please email it to <email address> by <deadline>. Expressions of interests submitted after this time will not be considered. We will then shortlist and get in touch with to let you know next steps.

Demographic information (optional)

Please see the below optional questions to help us learn about the people who are interested in getting involved with our work at <organisation>. We will only use this information to monitor the diversity of our network and inform our approach to reach and work with the broadest range of people possible.

This information will be stored securely in an anonymised database and will be separated from the information you have given us in your Expression of Interest above. This information will not be shared with anyone outside of the <team and organisation> and will not be used to inform recruitment for this role or any processes outside of the aim of informing our approach to working with patients and the public. For more information on how <organisation> uses your personal data please see our Privacy Policy.

Add demographic questions. This usually includes questions on age, ethnicity, region, and gender.

5.3. Recruitment e-flyer example

5.4. Interview questions and scoring example

	Question	Who will ask?	Criteria / what we're looking for	Comments	Score
1	Can you tell us why you want to get involved in <group>, and how will your experiences and skills help you in the role?	John	0 – Doesn't answer question 1 – Satisfactory – Generally addresses the question but doesn't give examples. 2 – Good – Addresses the question and provides minimal examples relevant to the role. 3 – Excellent - Addresses the question and provides detailed examples relevant to the role.		
2	You may be in meetings where you disagree with the views of others sitting around the table. Can you provide an example of a similar situation where this has happened and how you handled it?	Jane	0 – Doesn't answer question. No relevant example given. 1 – Satisfactory - Generally addresses the question. 2 – Good – Acknowledges it can be a challenging situation. Identifies need to confident. 3 – Excellent - Acknowledges it can be a challenging situation. Identifies way to confidently and constructively ensure that their voice is heard and taken into consideration.		
John to ask if they have any questions:					
John to cover next steps: • We'll be back in touch with you by <date> to let you know if you've been successful. • We are looking to host the induction session and first group meeting on <these dates>. Are you available?					

5.5. Sample offer email (post-interview)

Dear <name>,

Thank you for your interest in <role>. We were impressed by the experiences and skills highlighted in your interview and expression of interest. As a result, we would like to formally offer you a position on the <group>. Congratulations!

As mentioned at the interview, we will be holding induction sessions on the following dates <provide list of dates/times of sessions>. This will take place <location>.

Please could you let me know the following as soon as possible:

1. If you would like to accept the role
2. If you are able to attend an induction session and which one you are able to attend
3. If you require any support to attend the induction session

I look forward to hearing from you. If you have any questions, please get in touch.

Once again, congratulations!

Best wishes,

<name>

5.6. Sample rejection email (post-interview)

Dear <name>,

Thank you for your interest in <role> and joining us for the interview last week.

Unfortunately, we are unable to offer you the role at this time. However, we are extremely grateful for the time you invested in this application process. If you would like to receive feedback from the interview panel, please let me know.

I appreciate this outcome may be disappointing, but we hope it will not stop you from getting involved in future activities/project at <organisation>.

If you have any questions or want to discuss anything further, please do not hesitate to get in touch.

Best wishes,

<name>

5.7. Training needs analysis example

This is a chance for you to highlight any areas of devleopment you wish to gain new knowledge or skills. The information will be kept confidential and will only be used to help us provide you with supportive learning resources and to plan future learning, training and development opportunities.

Please rate your knowledge level on the following areas from 1 to 5 (1 being low and 5 being high) and choose your top three areas of priority that you would like support with.

Skills	1	2	3	4	5	Priority
Role specific knowledge						
Understanding of sensitive data						
Understanding of public involvement and engagement						
Understanding the research cycle						
Technical skills						
Using online meeting software (Teams, Zoom)						
Using online engagement tools (online whiteboards, polls)						
Writing in plain English						
Soft skills						
Understanding data language (data literacy)						
Public speaking						
Providing constructive feedback						

Any other topics not covered here: