

# Citizen Panel Toolkit





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# Foreword

## **We live in unprecedented times. Times of challenge. Times of change.**

For me, fighting for inclusion and supporting disabled talent is personal. All too often, in my early days, there were people more focussed on the fact I was a wheelchair user than what I would bring to the table. Since then, numerous governments have sought to tackle these issues, yet young disabled people that I speak to still tell me about negative assumptions they are still encountering.

If we are to consign these attitudes to history, if we are to deliver real change, then we need grassroots campaigners to push for change at a local level.

This toolkit will help campaigners to work with others to drive forward positive changes in their local communities. It has primarily been designed for use in campaigning on issues affecting disabled people, but can be adapted to facilitate citizen panels focussed on other issues.

It provides step-by-step guidance on how to set up a citizen panel, recruit participants, elect a chair, run a campaign and many other essential elements to delivering change.

I am extremely grateful to all those people who have contributed to the development of this toolkit, including disability campaigners and citizen panels. Their experience has been invaluable in its development, helping to identify the practical pitfalls and challenges that panels can encounter. Without their contributions, it would have been

impossible to put this work together. I wish citizen panels using this toolkit the very best of luck in their endeavours. Delivering change isn't easy. You will get knock-backs. There will be moments when nothing seems to be working. But if you pick yourself up, and push through the barriers you're facing, you will make a real difference to people's lives.

**Ruth Owen OBE**  
*Chief Executive  
Leonard Cheshire*



# Establishing a citizen panel

**Welcome to our disability citizen panel toolkit – a tool for establishing a citizen panel to discuss issues affecting disabled people and to campaign for change in the local community. This toolkit aims to be a practical ‘living’ resource. It will support people in creating a sustainable, long-term form of meaningful disability representation in their area. It provides step-by-step guidance on how to set up a citizen panel, recruit participants, elect a chair, run a campaign and many other essential elements.**

## What is a citizen panel?

A citizen panel is a dedicated group of people who actively represent their community by campaigning for change within their local area. A citizen panel is an opportunity for people to regularly come together to connect with like-minded people, to identify and address issues within their community.

## Role of the citizen panel

A citizen panel is very strongly linked to social action. Social action is defined as “people coming together to help improve their lives and solve the problems that are important in their

communities”<sup>1</sup> Therefore, a citizen panel’s multi-layered role includes creating social action alongside: hearing and acknowledging people’s voices; encouraging citizens to take responsibility for their community; working in conjunction with a range of organisations (such as local services and councils); and giving feedback and campaigning for the improvement and development of services.

## Membership and attendance

The citizen panel will be made up of approximately 8 to 12 members. All efforts should be made to ensure there is a balanced and diverse membership which reflects the community it represents. It is recommended that all members attend a minimum of 50% of the meetings in a year. For example, if 8 meetings are held in a year, members should aspire to attend at least 4 of those meetings.

For there to be quorum, it is recommended that there must be 4 members present to approve a decision. Meetings may still occur if there are fewer than 4 members; however, no final decisions can be made during the meeting and will need to be deferred until quorum is achieved.

To become a member, people should attend the citizen panel information event where they can join the panel by

<sup>1</sup> <https://www.gov.uk/government/publications/centre-for-social-action/centre-for-social-action>

completing a physical form or an online version. Alternatively, people interested in signing up can contact the panel and request a sign-up form.

## Process

The citizen panel should meet on average every 6 weeks. Meeting frequency may be increased or decreased at the discretion of the panel. Meetings will take place virtually, although if the panel wish to meet in person, these should be conducted in a blended format so members can still attend virtually if required. A subscription to a virtual platform (such as Zoom or Microsoft Teams) will need to be arranged to hold the meetings.

Agendas for the meeting will be agreed by the Chair and will be issued to all panel members in advance of the meeting along with instructions for how to join the meeting. During the meetings, minutes will be taken by a designated person and circulated to all panel members afterwards.

## Electing a Chair

It is advisable to wait until the training

modules are completed until electing a Chair. Members of the panel need time to get to know one another and understand the commitment required to be part of a citizen panel. If the panel does not have a supporting partner organisation, it is recommended that one person volunteer to run the training modules for the rest of the panel. After the training modules have been completed, the role of the chair should be advertised, and all members should be encouraged to read the job specification.

To apply for the role of Chair, applicants should pitch their justifications to fellow panel members, explaining why they would be suitable for the role. One approach could be to do a presentation. Alternatively, an applicant may wish to write a letter to the members. People should have the choice as to how they pitch their justifications, to ensure equality and fairness throughout the application process.

When all pitches have been completed, it is recommended that panel members vote for their preferred Chair. This could be done in person or using an online voting tool (such as Slido or Survey



Monkey). The method for voting must be easily accessible to all members and allow no opportunity for conferring or favouritism.

The member with the most votes will become the Chair. It is suggested that the Chair commit to a minimum term of 12 months. By default, the runner-up will assume the role of Vice Chair.

## How to recruit participants

An information event should be organised to recruit participants where interested people can sign-up using a form (physical and online). If the panel is already established and seeking to recruit new members, the panel should advertise their vacancies using social media (Facebook, Twitter, etc.) and local resources (newspapers, radio stations, etc). As during the initial recruitment, a sign-up sheet should be used for members to apply.

It is advisable for the panel to set up a quarterly newsletter in which they can advertise for new members, as well as promoting their panel to other

organisations (for further details please see the fundraising and finance and stakeholder relationships sections).

## Selection of panel members

It is recommended that the panel be open and accept all applicants wishing to join. The optimal number of members is approximately 12. If there are a high number of applicants (15+), one solution could be to create a sub-group within the citizen panel. In this situation, there would be a steering group (a group within the panel who decide on the priorities or order of business) and a sub-group responsible for one element of a campaign (examples include fundraising, advertising, social media, communication). The Chair should have overarching authority over both groups.

If the panel is to proceed this way, it is advisable that the steering group and sub-group meet separately every 6 weeks. Every few months, both groups should meet together to feedback on their progress and review the next course of action relating to the current campaign.







# Campaigning

## How to run a campaign

There are many ways to run a successful campaign, and, over time, each panel will find a way that suits them and their goals. Outlined below is a step-by-step guide on how a campaign could be run:

### Stage 1: decide upon a campaign topic.

The panel should consider issues that are affecting the local community. Identify what success looks like – what is the end goal? For example, the end goal could be to get a law changed, or it could be to raise awareness of the issue. The panel should have a clear understanding of what a successful outcome looks like, and this should be identified early in the process.

### Stage 2: develop a project plan.

This plan should outline the aims and objectives of the campaign (what do you want to achieve?), as well as a timeline and delivery plan (when will it be achieved by?). The project plan needs to be realistic and should reflect an awareness of any issues that may delay the campaign. Within this project plan, it is recommended that the panel identify any key stakeholders (such as politicians, organisations, businesses) and funding opportunities so the panel are aware of

them in advance and can plan appropriately.

### Stage 3: advertise the campaign.

Advertising can take many forms, including social media, newsletters, posters, radio interviews and adverts in papers/local guides. The aim of advertising is to gain support for the campaign by increasing people's awareness of it. An ideal way to advertise a campaign is to create a poster with all the key details on it and to circulate it both physically and virtually. Social media, such as Facebook and Twitter, can also be effective ways of increasing a campaign's exposure.

### Stage 4: network.

Reaching out to stakeholders - organisations and people who are associated with your campaign topic - can be vital in gathering support for the campaign. This can be achieved by researching your campaign topic, or by contacting relevant individuals and organisations. For example, if the panel are campaigning for improved disabled access on trains, organisations like Transport for Wales and Arriva Trains Wales would be valuable to network with.

### Stage 5: gather evidence.

If the panel is looking to make changes to laws and legislation, it is

recommended that they gather evidence to support their campaign, so they have examples to submit to the relevant bodies. Evidence can be collected in various ways: signed petitions, surveys, feedback/comments from members of the public, video interviews, as well as quantitative data (data in the form of numbers, rather than words).

## Stage 6: pitch the campaign.

To change legislation, the panel should pitch their campaign to politicians and councillors. This gives the panel a platform to express their concerns and present their evidence, in the hope that the relevant people will support them in their bid for change. To pitch a campaign, it is advisable to have a presentation explaining the campaign and the steps the panel followed to get to their current point. The panel could also present the evidence collected (as above) and invite a member of the public along to share their experience.



## Stage 7: review and evaluate.

At the end of the campaign, the panel should hold a review session to evaluate their progress and whether they achieved their intended outcome. If the panel feel that they achieved their goals, they may decide to move on to another campaign. If the panel feel like they have not yet achieved what they set out to, they may re-evaluate the project plan and extend the campaign. Alternatively, they may pause the campaign and re-start it later when they have gathered more resources. The decision to finish a campaign should be agreed by most panel members.

For more tips on how to run an effective grassroots campaign, please refer to Appendix 1.



# Fundraising and finance

## How to set up a bank account:

**To open a charity account for the first time, the panel might be asked to call or visit the bank's business services department. They may need to see the panel's constitution or governing document, or the minutes of the meeting that appointed the signatories. Be prepared! The bank will always need at least two signatories and they cannot be related to one another.**

## Quick tips:

- Consider a bank with a local branch, convenient for the panel.
- Think about using a bank that the Treasurer already banks with personally - this might help to shorten the process.
- Check that the account meets the needs of the panel (e.g. banking methods, fees, ethics).
- Look for accounts that offer online banking (to look at statements and make payments easily).
- Set up the account so that at least two people are required to sign each cheque or approve withdrawals.

- Choose signatories with good credit ratings (the bank will run credit checks).

## How to fundraise:

There are many ways to generate income for projects and groups from traditional means like grants and trusts, to more inclusive ways like Just Giving and crowdfunding. However the panel chooses to fundraise, they need to think of the project and cause first:

Why are you fundraising for this project and why should people support you?

How much do you need to raise? Have a budget, even if it's approximate, so you set a clear target.

What will the impact be? People like to know their money will make a difference.

## Different forms of fundraising

Many organisations will fund projects from £500 to £500,000. The panel need to find the right one that meets their needs and one that will align with their key values. Get in touch with the local Corporate Venture Capital (CVC) – they will inform the panel about funders in the local area, as well as help the panel to apply for the funding. The panel could also sign up to bulletins through the Wales Council for Voluntary Action

(WCVA) and their local CVC, as they will produce useful monthly funding opportunities and other news updates.

The following websites are helpful when searching for funding opportunities:

<https://thirdsectorsupport.wales/>

<https://wcva.cymru/funding/>

<https://www.grantsonline.org.uk/region-news/wales/>

## How to apply for funding:

Firstly, research the funder and see if their values align with that of the panel and the campaign. Funders are more likely to provide the funding if they feel that there are shared values and an outcome that is beneficial for all parties. For example, Children in Need would be unlikely to fund a campaign supporting elderly people, as this is not their target audience.

When accessing funding, usually the funders like to receive a bid – a proposal explaining why that group should receive the funding and what they aim to achieve with it. Before planning what the bid will look like, it is important to get



clarity from the funder about the format of the bid: some funders are happy with an email, others already have a bid template available, or the funder may request a formal meeting and presentations.

Funding bids should answer four key questions:

- What is the problem you are trying to solve?
- What is the solution that you are proposing?
- Why are you the most suitable group to achieve that?
- What will be different when you have received the funding?

Each of these questions need to be thought about carefully and the answer should be clear. By the end of the bid, the funder should know exactly what the panel is trying to achieve and what the intended outcome will look like. If the panel is not able to answer these four questions, it is advisable that they reconvene as a group and plan out their campaign in more depth.

Another important piece of information to get across to the funder is how the partnership will work – funders want to be involved in the campaign journey and be regularly updated as to how their money is being spent, as well as whether the intended outcomes are on their way to being achieved. Funders want to be reassured that their money is making positive change. The panel should be clear on the funder's expectations and agree a communications plan with them. Some funders will be content with a quarterly or bi-annual update via a report, whereas others may want an in-person meeting with evidence of the achievements so far.

# Managing Relationships and Communication

## Stakeholder relationships

**A stakeholder is defined as someone who has an interest in an organisation and can either affect or be affected by the business and the decisions made. An example of a stakeholder for a citizen panel may be other disability organisations, local councillors or ministers, or members of the Local Authority.**

Prior to beginning a campaign, it is a good idea to identify the key stakeholders for that campaign topic and map out how and when they may play a role in your project. In doing this,

everyone understands from the beginning who should be contacted and what is being achieved through this communication. There needs to be a clear argument as to why the stakeholder should support your campaign, with an explicit message of how it benefits all parties involved. Importantly, expectations need to be realistic: do not over promise what you can provide the stakeholders.

Before contacting stakeholders, you should agree a consistent message – how do you want them to be involved? This means that all panel members have a secure understanding of what to relay to the stakeholder, avoiding confusion. It is advisable to identify a single point of



contact so messages between the panel and the stakeholder remain consistent.

When contacting stakeholders, the message, tone and type of communication needs to be adapted to suit the audience. For formal stakeholders, such as Members of Parliament, the panel may wish to write a detailed letter. However, for informal relationships, like a disability volunteer, a simple email or message would be more appropriate.

It is very important to collaborate with stakeholders and engage in co-production. If a stakeholder offers the panel an audience to present their campaign, it would be respectful to offer the same to the stakeholder. The purpose of building stakeholder relationships is to work alongside one another, and this means reciprocating their opportunities by giving them the chance to promote their work.

## Means of communication

### Internal communication

Internal communication is communication between panel members. An example of internal communication would be the Chair informing panel members of the date for the next meeting. This means of communication is at the discretion of the panel: possible methods include email, Facebook Messenger, text or Whatsapp. The panel should agree on which form of internal communication they wish to use and stick to this method as much as possible to avoid miscommunication between panel members.

### External communication

External communication is communication between the panel and any organisation, business or people that are not associated/involved with the panel. An example of external communication would be a panel member sending a letter to a

stakeholder. Other examples include press releases, newsletters, emails, and telephone calls. The panel should agree upon an external communication method. Things like who writes and publishes the communication need to be considered, as well as whether the content of the communication needs to be reviewed and signed off by the panel before submission.

To see examples of different types of external communication, please refer to Appendix 2.

### Organic communication

Organic communication is communication that arises naturally, usually through social media channels. An example of organic communication would be someone leaving a comment on a Facebook post and a panel member replying to the comment. The panel should also agree upon an organic communication method. It needs to be considered whether replying to comments on social media should be signed off by the panel too, or if the panel are content with the social media manager undertaking this role without the need for quorum.



# Roles and Responsibilities

**There are multiple roles within a citizen panel that people can apply for. At the panel's discretion, roles can be added or removed. There are three roles that are required if the panel are looking to fundraise and access community funds. These roles are the Chair, the Treasurer, and the Secretary. These are non-negotiable: if these three roles are not in place, the panel will not be able to access any funding. However, if the panel wish to volunteer and donate money themselves, rather than fundraise, these roles are not required.**

*Required roles for fundraising purposes:*

## **Chair:**

The Chair has overarching authority over the citizen panel. This means that they are responsible for organising and facilitating the meetings, as well as writing the agenda for each meeting. They will have co-ownership of the citizen panel's bank details and they will be responsible for ensuring that the panel meet their intended outcomes for each campaign.

## **Treasurer:**

The Treasurer is responsible for the citizen panel's funds. They will have co-

ownership of the bank account, alongside the Chair. They will also be responsible for managing the citizen panel's budget and ensuring that any money is spent appropriately and legitimately. The treasurer is also responsible for applying for any bids or community funds to financially support the campaigns.

## **Secretary:**

The Secretary will oversee the citizen panel's email account, and be responsible for any enquiries. At each meeting, they will record the minutes and circulate them to the panel members afterwards. If the panel decides to do a newsletter to share their progress and updates, the Secretary will also be responsible for writing its content and sharing it with the relevant audience.

## **Optional roles:**

There are also many additional roles that the panel could include, such as a Vice Chair, a Social Media Manager, and a Fundraiser. These roles are not required to access funding, but they can be helpful in assisting the success of the campaign.

## **Vice Chair:**

The primary responsibility of the Vice Chair is to attend meetings and commitments when the Chair cannot. If the Chair is not present at a meeting or is unavailable for a period, the Vice Chair is

to assume the Chair's responsibilities until the Chair returns. The Vice Chair is also responsible for supporting the Chair with meeting preparation and helping the panel to achieve their campaigning goals.

### **Social Media Manager:**

This role involves creating and managing social media accounts (such as Facebook, Twitter, Instagram) on behalf of the panel. Responsibilities include monitoring follower count and engagement, as well as taking photos and posting them with captions to inform the audience of the panel's progress.

### **Fundraiser:**

At the panel's discretion, the role of a fundraiser could be given to more than one person to form a fundraising group. This role involves organising fundraising activities to raise money for the panel and their campaigns.





# Code of Conduct and Safeguarding

## Code of conduct

**A code of conduct refers to how panel members should behave and conduct themselves during meetings and events. It is recommended that all panel members uphold and respect the following principles:**

- Respect the views of others and do not direct insults or criticism at any other individual.
- Accommodate reasonable adjustments to make sure that all panel members can participate equally.
- Contribute fully to panel meetings and get involved in campaigns to demonstrate commitment to the panel's work.
- Communicate regularly with each other including via email and text message (in business hours).
- Act in the best interests of the panel and put aside any personal interests to avoid conflict of interest.
- Facilitate the orderly conduct of meetings and adhere to the agenda.
- Uphold polite, respectful, and constructive behaviour, including not bullying, harassing, or discriminating against any other person.

- Maintain strict safeguarding standards.

## Safeguarding

### Safeguarding measures:

Safeguarding measures are put in place to protect the health, well-being, and human rights of individuals – particularly children and vulnerable adults. In this context, children means anyone under the age of eighteen, and a vulnerable adult is defined as anyone over the age of eighteen who is unable to protect themselves from harm due to illness, age, disability or any other physical or mental disability.

A Disclosure and Barring Service (DBS) check is not a legal requirement for a citizen panel. However, it is highly recommended, especially if there will be events with children or vulnerable adults in attendance. In some circumstances, a DBS check will be a legal requirement. If a panel member is a child or a vulnerable adult, all panel members should have a DBS check to safeguard that individual from harm. It is the responsibility of every panel member to make sure they are safeguarding vulnerable individuals, with a DBS check often being the first step. The NSPCC has a considerable database of information about how to protect children and vulnerable adults: <https://www.nspcc.org.uk/>. All members of the panel should be directed to safeguarding information and made aware of the laws regarding it.

When working with children or vulnerable adults, conduct should always be professional and respectful. They should rarely be left alone without a trusted adult present. If a disclosure is made about abuse or neglect, there is a duty to report it to the relevant people and/or organisations (e.g. police if the child/vulnerable adult is in immediate danger). Although this could be rare in the context of a citizen panel, there is a likelihood that it could happen at some point and all members must be clear about the process to follow and their legal duty of care towards that individual.

### **Whistleblowing:**

A whistle-blower is a worker who reports certain types of wrongdoing about their own workplace. The wrongdoing that is reported on must be in the public interest: it must affect others, not just the person disclosing it. A whistle-blower is protected by law – this means that they cannot be treated unfairly or lose their job because they have reported their

concerns. A whistle-blower can raise concerns at any time about a past incident, one happening at the present time, or even one that they believe will happen soon. Personal grievances (for example, bullying or discrimination) are not covered under whistle-blowing law, unless it affects members of the public.

### **Consent:**

If panel meetings are being conducted virtually and there is a need to record them to keep a log of the discussions, all attendees must give their consent prior to the recording being started. If the panel are wishing to share photographs or videos on social media or any other platform, they must have the consent of all people pictured or videoed. Written consent is preferable. If the person does not consent, either the photograph/video cannot be published, or their face needs to be thoroughly obscured or cropped out. If they are children, parental or guardian consent must be obtained prior to posting.



# Risk Assessments and Event Management

## Risk assessments

When planning an event, a risk assessment of the venue should always be conducted so all panel members are aware of the hazards that could occur and how to mitigate them. Ideally, the risk assessment should be completed two weeks before the event to ensure panel members have time to fully understand, review and respond to the assessment. A blank risk assessment template can be found in Appendix 3. An example of a completed risk assessment is:



<b>Risk</b> <b>Are there any hazards? Who may be harmed?</b> <b>Could any accidents happen?</b>	<b>Response</b> <b>How will you remove or reduce any risks?</b> <b>Who will be responsible for doing this?</b>	<b>Risk rating</b> <b>Severity of risk or likelihood of occurrence (1 = not very likely, 10 = very likely)</b>
Moving around the outdoor environment – uneven surfaces and trip hazards resulting in a fall or injury	Encourage awareness of surroundings. Put cones or tape out on uneven steps. Keep a first aid kit nearby.	5.

Table 1: Example of completed risk assessment.

If the panel is running an event, it is good practice to complete an event safety plan. This is a document that includes important details about the event, such as the number of toilets, where the fire exits are located, who is responsible for first aid, and the location of the fire assembly point. It should also include an emergency back-up plan if the event does not proceed as expected, such as if bad weather occurs or if someone seriously injures themselves and the emergency services need to be called. Lastly, all emergency contact details should be listed – usually, this would be the Chair and the Vice Chair. This document should be circulated to all panel members, alongside the risk assessment, so everyone is clear as to what procedure needs to be followed should an incident happen. There is a blank template event safety plan in Appendix 3.

## Event management

There are lots of things to consider when planning an event.

### First aid:

Event organisers have a duty of care to the people they have invited. Someone in the panel should be first aid trained to administer first aid if an injury occurs. If a more serious injury happens, the emergency services should be called. Many organisations offer first aid training – it is advisable to train at least two people so if one cannot attend an event, there is another first aider available to step in. During the event, the first aid kit should be kept somewhere easily accessible.

Alternatively, rather than training someone within the panel, organisations like St John's Ambulance can be hired to provide first aid cover for events for a cost. They have produced a guide outlining the first aid requirements for specific events - <https://www.sja.org.uk/what-we-do/our-first-aid-services/event-first-aid-cover/getting-the-right-level-of-first-aid-cover>

[for-your-event/](#)

### Fire safety:

It is the event organiser's duty to prevent and mitigate the risk of a fire. A fire risk assessment should be completed prior to the event and all panel members should be briefed on the fire procedure to ensure everyone exits the venue safely if a fire does happen. Emergency service vehicles should also be able to easily access the venue.

When setting up the event, it is important to make sure that fire exits are not blocked and that there is always a clear path towards them. This path should be accessible to all: therefore, it needs to be suitable for wheelchair users and wide enough for both a carer and a disabled person to walk side-by-side.

### Permits and permissions:

Sometimes permits will be required to run an event. The number and type of permits required will vary depending on the region and the event. It is advisable that research is conducted into what is needed to see if the event is viable. Although not a legal requirement, it is always a good idea to get public liability insurance cover, as it will cover the cost of claims made by members of the public for incidents that occur in connection with the event, such as personal injuries or damage to property.

For a full informative guide on what permissions are needed to run a voluntary event, please follow this link to the government's website: <https://www.gov.uk/government/publications/can-do-guide-for-organisers-of-voluntary-events/the-can-do-guide-to-organising-and-running-voluntary-and-community-events>

### Accessibility:

*Before the event:*

Every event should be accessible to all. It is the responsibility of the event organiser to ensure all reasonable

adjustments are catered for. When advertising and sending invites out, it is advisable to encourage people to get in touch with their requirements, like whether they need a British Sign Language interpreter, specific dietary needs or a parking space close to the entrance. By doing this in advance, the organisers can make sure everyone's needs are satisfactorily met. On the advertisements, it is also a good idea to make information about accessibility clear – state whether the venue has wheelchair access, if a lift is available or if there is a hearing loop that can be utilised. This will make people feel confident and more inclined to attend if their needs are being catered for.

To put people's mind at ease, it is a good idea to provide a guide which includes details of an accessible route map, disabled parking bays and disabled toilets, as well as the accessible emergency exits and evacuation route. It is important to note that people may need advertisements and information printed in a different colour, large font or in Easy Read to be able to access the text – this needs to be a consideration when asking attendees about their accessibility requirements. If there is no disabled access to some parts of the venue, a temporary ramp can be hired and installed. Lastly, it is advisable to have a quiet room available: this can provide people with a space to relax, take medicine or take a sensory break if the event and crowd is too overwhelming.

#### *During the event:*

There are also lots of things that can be done on the day of the event. Volunteers can be assigned to meet with attendees or direct them towards disabled parking. This can be a good way of making sure anxious attendees feel reassured that assistance is available throughout event. Additionally, the event set up can be adapted to facilitate wheelchair and mobility scooter users – make sure aisles are wide enough, tables are not

unreasonably high and that the route to the emergency exit is clear.

If there are speakers or performances, it could be a good idea to reserve seating for people with hearing or visual impairments, carers, and interpreters to maximise the event's accessibility. This can relieve a lot of stress and anxiety and make the event more enjoyable for people who need adjustments.

All staff and volunteers should do what they can to make the event accessible and to assist with any reasonable requests. Not all needs may have been planned for, so it is important that staff understand what to do should a request be brought to their attention on the day. If it's not possible to put in place an adjustment, a clear reason should be communicated to the person/group.

#### **Costs:**

Facilitating an event can be extremely costly and it is important to budget wisely. The treasurer should draw up a maximum budget for the event and ensure that all panel members are aware of it to avoid overspending. It is the responsibility of all panel members involved in the event to monitor the budget and flag any concerns with the treasurer. For volunteer events, it can be a good idea to request donations of equipment, food, drinks, and money from the local community, or charge a small entry fee. Recruiting volunteers to support an event can also reduce costs. Furthermore, it is always worth asking whether, in exchange for promotion and exposure, speakers and performers will do the event for free or a reduced rate.



# Admin Processes

## Transparency

**The panel should agree the timeframe in which the minutes from each meeting will be circulated to members. It is recommended that all panel members receive a copy of the minutes as it ensures everyone is clear about the actions and next steps they need to take.**

The Chair and Treasurer should regularly communicate updates on the campaign and budget to panel members. At the start of panel meetings, the Chair and the Treasurer should provide any updates since the last meeting. If there is an urgent issue, this should be communicated to panel members as soon as possible e.g. via email.

To be transparent with stakeholders, the panel could write a newsletter to update people on their progress. It is up to the panel how often the newsletter is posted, but every 3 months is advisable. The newsletter could be circulated via email, social media or posted on a webpage. Please refer to Appendix 2 for a template newsletter.

## Conflicts of interest

A conflict of interest occurs when an individual's personal interests, such as family, friendships, or financial matters, could compromise their judgment, decisions, or actions as part of the panel.

Any panel member who becomes aware of a potential conflict of interest must notify the Chair as soon as possible. If the conflict only becomes apparent at the meeting, they should declare this at the meeting and, where necessary, withdraw during discussion of the relevant agenda item. If a conflict of interest arises, the panel member does not need to permanently resign from the panel, however, they should remove themselves from any future discussions where this conflict of interest arises.

## Complaint procedure

If a panel member wishes to log a formal complaint against another member of the panel, the following steps are recommended:

### Notify someone

As soon as the incident has occurred, notify the Chair. If the Chair is the person the complaint is against, notify the Vice Chair, Secretary or Treasurer. This initial conversation is a chance to explain what has happened and why a complaint is being logged. This can either be an email, a message, a phone call or an in-person meeting. There is a possibility that the issue can be resolved at this stage with no further intervention needed, or the remaining steps may need to be followed - this is dependent upon the nature of the complaint.

## Log the complaint in writing

If the complaint has not been resolved after step 1, the complaint should be put in writing and emailed or posted to the relevant person. Clear details should be given about who the complaint is against, when it happened and what the problem is. It would also be helpful to include what the ideal outcome is. The person that has been notified should respond and acknowledge the complaint, as well as outline the next steps they are going to follow.

## Supply evidence

Any evidence supporting the complaint should be collected and submitted to the investigator as soon as possible. It is also advisable to write down the time and date of any calls, alongside the person spoken to and the details of what was said. This will provide the investigator with a complete record to refer to as part of their investigation. Allow time for the complaint to be investigated.

The amount of time it takes to investigate the complaint will depend upon its severity and complexity. Some complaints will be resolved quicker than others but, on average, it should take between four to six weeks for a resolution to be reached. This duration ensures the investigator has enough time to assess all of the evidence and come to a justified conclusion. During this time, the investigator may contact you to get clarity around a certain part of the complaint or to request more evidence. If there has been no contact from the investigator after four weeks, get in touch with the investigator and request an update on the investigation.

## Accept or appeal the resolution

When the investigator has come to a conclusion, they should present their resolution to all parties involved. If the complainant is content with the resolution, they should accept the investigator's judgement. If the person is

not content, they can appeal – by requesting another person to investigate. If an appeal is preferred, the person complaining should put in writing why the resolution was not acceptable and why they think a second investigation is needed. It is important to note that an appeal can be denied if the reasoning is not strong enough. If the appeal is accepted, the steps outlined above should then be completed again.

## Leaving procedure

If a panel member decides that it is time to move on, they should submit their resignation in writing to the Chair. Ideally, the person should attend the next panel meeting so they can tie up any loose ends and do a handover to the rest of the panel. This allows a smooth transition for the panel, as well as ensuring that disruption to the campaign is minimised. Any documents, equipment, or records that the person resigning possesses should be given back to the Chair for confidentiality purposes.

If the Chair is the person resigning, they should submit their resignation in writing to either the Treasurer or Secretary. If the panel has a Vice Chair, they will become Chair in the interim until the election process begins. It is recommended that the Chair attend the following two panel meetings to ensure an effective handover and be involved in the re-election process. When a new Chair has been elected, the former Chair should give all their documents, equipment and records to the new Chair. The panel may decide to pause the current campaign until a Chair is elected and confident in their role. If the Chair, Treasurer or Secretary resigns, their role should be filled as soon as possible so fundraising can continue.

## Process for extenuating circumstances

Extenuating circumstances are events that are usually unforeseen or



unpreventable and outside of a person's immediate control. In this context, an example of this situation would be a long-term illness or death of a panel member, leaving them unable to fulfil their duties and responsibilities. It is important that the panel have an agreed plan in place should extenuating circumstances occur. It is recommended that the Vice Chair step in if the Chair is no longer able to run the panel. If the panel does not have a Chair, they will need to agree upon a suitable person for the role.

The sharing of documents also needs to be considered. If only one panel member has all the necessary paperwork, and they are unavailable, the panel will not be able to access any of their documents. To mitigate this, all documents should either be on a shared drive that everyone has access to, or photocopies should be

made of any physical documentation and kept in a safe location where another panel member can access them.

## Review

A review of the citizen panel and its terms of reference should be undertaken after 12 months, or earlier if the panel agree that it would be beneficial. This review should be completed by the Chair, and any comments or adaptations should be circulated to the other panel members. Prior to completing a review, it is advisable to hold a panel feedback session where members can review and request changes to the terms of reference. The Chair should incorporate these when completing their review.







**Leonard Cheshire**

66 South Lambeth Road  
London SW8 1RL

**Telephone:** +44 (0)20 3242 0200

**[leonardcheshire.org](http://leonardcheshire.org)**



**Leonard Cheshire Disability**, Registered Charity No: 218186 (England and Wales) and no: SC005117 (Scotland) and a company limited by guarantee registered in England no: 552847. VAT no: 899 3223 75. Registered office: 66 South Lambeth Road, London SW8 1RL.

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