Citizen Panel Toolkit

How to start and run your own Citizen Panel

This document was written by **Leonard Cheshire**. It is an easy read version of **'Citizen Panel Toolkit'**.

May 2023

How to use this document

This is an easy read document. But you may still need support to read it. Ask someone you know to help you.

Words in **bold blue writing** may be hard to understand. You can check what the words in blue mean on **page 66**.

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Contents

Introduction

We are Leonard Cheshire. We help disabled people to live, learn and work on their own as much they want to.

This toolkit will help you start your own **citizen panel**. A **citizen panel** is a group of people who represent their community. They:

• meet to talk about problems in their community

• and campaign for change within their local area.

Disability campaigners and citizen panels have helped us make this toolkit.

Their experience has helped us to make this toolkit better.

Starting a Citizen Panel

A citizen panel is a group of people that comes together to:

- Improve their lives and solve problems in their communities.

- Listen to people's views.

- Encourage people to take an interest in their community.

- Work with organisations, like local services and councils.

- Give feedback about services and campaign for better services.
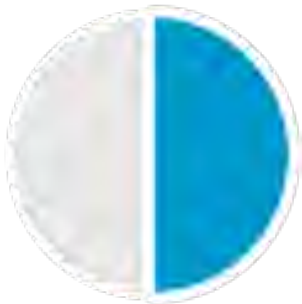
Membership and attendance

8 to 12

Your citizen panel should have 8 to 12 members.

You should try to make sure the members represent everyone from your community.

For example, members should be from different backgrounds, be different ages and may believe in different things.

Members should go to at least half of the meetings held in a year.

There must be at least 4 members at a meeting to make a decision.

You can have meetings if there are fewer than 4 members, but you cannot make final decisions unless there are 4 or more members.

To become a member, people should:

- Go to an information event where they can join the panel by filling in a form. Either on paper or online.

- Or contact the panel to ask for a sign-up form.

Meetings

Your citizen panel should meet about every 6 weeks.

Meetings should take place online.

If you want to meet in person, members should still be able to join in via video call. You could use Zoom or Microsoft Teams for your meetings.

Before the meeting:

The Chairperson will send all panel members the agenda and instructions for how to join the meeting.

During the meetings:

One person will take notes and give copies to all panel members after the meeting.

Choosing someone to be Chairperson

The Chairperson is the person in charge of the meetings. They will make sure everything is organised for the meetings. And lead the meetings as they are happening.

It is best to wait until everyone has done the panel training before choosing a chairperson.

If your citizen panel does not have an organisation helping, then 1 person should run the training for the panel.

After you have all done the training, you should advertise the role of the Chairperson. You should encourage all members to read the details about the role.

To apply for the role of Chairperson, panel members should explain why they would be best for the role.

They could do this by doing a presentation or writing a letter to the members. People should have the choice about how they do this, to make sure it is fair.

It is best that panel members vote for the person they think should be Chairperson.

You can do this in person or by using an online voting tool, like Slido or SurveyMonkey.

It must be easy for all members to be able to vote. Members should not ask each other who they are voting for.

The member with the most votes will become the Chairperson. It is good if the Chairperson can do that role for at least 12 months.

The person who came second in the voting will be the Vice Chairperson. They are second in charge and will support the Chairperson.

How to get members

You should have an information event to get your first citizen panel members. People should ask to join the panel by filling in a form. Either on paper or online.

When you want more new members, you should ask people using social media and local newspapers and radio stations.

Members should apply using a form.

It is good to send out a newsletter about your citizen panel every 3 months. You can use your newsletter to ask for new members and to tell other organisations about the panel.

Choosing members

The citizen panel should be open to all people that want to join.

The best number of members on a panel is 12.

If you have more people, you can create a sub-group within the citizen panel.

This means there would be a main group who decide what is important to work on and in what order.

And a sub-group who work on 1 thing, like fundraising, advertising, or social media.

The Chairperson should have the final say in both groups.

The main group and sub-group should have separate meetings every 6 weeks.

Every few months, both groups should meet to talk about what they have been doing. And plan what to do next.

Campaigning

A campaign is an activity you do to achieve a certain goal.

How to run a campaign

There are many ways to run a campaign, and each panel will find a way that suits them best.

Here is a guide on how you could run a campaign:

1. Choose what to campaign about

You should think about issues that are affecting your local community.

Decide what you want the goal to be. It could be to get a law changed, or it could be to get more people to know about the issue. You should understand what changes you want to see.

2. Make a project plan

This plan should:

- Say the goal of your campaign.

- Say when you will do things and when it will end.

- Name the key people involved like politicians, organisations, businesses.

- Include any ways to get funding. So you know where money will come from for the work early and can plan well.

3. Advertise the campaign

Advertising can be:

- social media

- newsletters

- posters

- radio interviews

- and adverts in local papers.

The aim of advertising is to get support for the campaign by telling people more about it.

A good way to advertise a campaign is to make a poster about it.

You can give this to people on paper and online.

Social media, such as Facebook and Twitter, can be a good way to spread your message.

4. Network

Contacting groups and people linked to your campaign topic can be good to get help and support for the campaign.

5. Collect proof

If you want there to be changes to laws, it is best that you gather proof to support your campaign. Your proof could be:
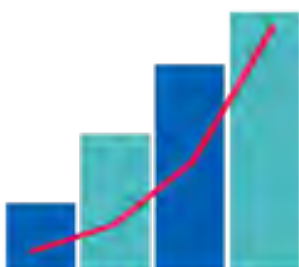
- Signed petitions.

- Surveys.

- Comments from members of the public.

- Video interviews.

- Things you have counted or measured.

6. Get important people involved

To change laws, you should tell politicians and councillors about your campaign to try to get them to support you.

It is best to have a presentation explaining the campaign and the steps you followed.

You can present the proof you collected and ask a member of the public to share their experience.

7. Review and check

At the end of the campaign, you should look at your progress and see if you have reached your goal.

If you have reached your goal, you might decide to start a new campaign.

If you have not reached your goal, you might:

- Look at your project plan and run the campaign for longer or

- Stop the campaign for a while and restart it later when you have more support.

More than half of your citizen panel members must agree to finish a campaign.

For more tips on how to run a good campaign, please look at **Appendix 1**.

Fundraising and money

How to set up a bank account

To open a charity bank account, the bank might ask the citizen panel to call or visit them.

The bank might need to see some of the panel's documents or the minutes of a meeting.

You should set up the account so that 2 people must sign each cheque or approve taking money out. The 2 people cannot be from the same family.

Think about using a bank that is near where the citizen panel lives.

How to fundraise

There are lots of ways to get money for your campaign:

- Grants

- Trusts

- JustGiving

- Crowdfunding

Think about your campaign:

- Why should people give money to you?

- How much money do you need? Have a goal to aim for.

- How will the money help you? What will you use the money for?

Different forms of fundraising

Organisations might want to give small amounts like £500. Or large amounts like £500,000.

You need to find the one that meets your needs and goals.

Get in touch with your local **Corporate Venture Capital**. **Corporate Venture Capital** is money from big businesses that want to support community work.

You can find out more about **Corporate Venture Capital** here: www.british-business-bank.co.uk/finance-hub/corporate-venture-capital

You can sign up to their newsletter for regular funding ideas.

They can:

• Tell you about funders in the local area.

• Help you to apply for the funding.

You could sign up to the newsletter from **Wales Council for Voluntary Action** (WCVA).

These websites are helpful when searching for ways to get money for your campaign:

www.thirdsectorsupport.wales

www.wcva.cymru/funding

www.grantsonline.org.uk/region-news/wales

How to apply for funding

Find out about the funder and see if what they do matches up with your campaign.

Funders are more likely to give the money if:

- they feel that you share their values and

- you have a goal that is good for you and them.

The funders like to receive a bid. This is where you tell them why you should get the funding and what you want to do with it.

Ask the funder how they want to receive the bid. It could be:

- an email

- a form you need to fill in

- a meeting

- a presentation.

Funding bids should answer 4 questions:

1. What is the problem you are trying to solve?

2. What is the goal that you are aiming for?

3. Why are you the best group to achieve that?

4. What will be different when you have the funding?

You need to tell the funder how you will keep them involved.

They will want updates about:

- How you are spending their money.

- If you are on track to achieve your goals.

They want to know that their money is making positive change.

You should agree a plan with them about how and when you will keep them updated.

Updates could be monthly, every 3 months, or every 6 months.

They might want a report or a meeting with proof of what you have done so far.

Stakeholders

A stakeholder is anyone who has an interest in the work you are doing because:

- your work impacts them

- or they can impact your work.

Stakeholders might be disability organisations, local councillors, or government ministers.

Find out who the stakeholders are for your campaign before you start.

Think about who would be interested in your work. This is so you know who to tell about what you are doing.

Before contacting stakeholders, you should think about how you want to involve them.

This means that all panel members understand what things to tell the stakeholder about. It is best if 1 panel member makes contact.

Different stakeholders need different types of contact. For Members of Parliament, you might write a letter.

For a volunteer, an email or phone message might be better.

It is important to work with stakeholders and help each other.

Ways of communicating

Internal communication

Internal communication is talking between citizen panel members.

An example would be the Chairperson telling panel members the date for the next meeting.

This could be by email, Facebook Messenger, text or WhatsApp. The panel should agree on which form they want to use.
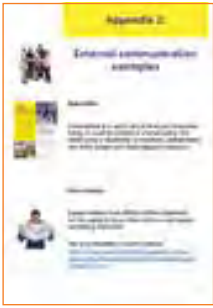
External communication

External communication is talking between the citizen panel and outside organisations, businesses or people.

An example would be a panel member sending a letter to a stakeholder. Other examples include press releases, newsletters, emails, and phone calls.

To see examples of different types of external communication, please look at **Appendix 2**.

Organic communication

Organic communication is usually through social media channels. An example would be someone leaving a comment on a Facebook post and a panel member replying.

Roles and duties

There are lots of roles within a citizen panel that people can do. There are 3 roles that you must have if you want to fundraise and get community funds. These roles are:

- Chairperson.

- Treasurer.

- Secretary.

You cannot apply for funding without people doing these 3 roles.

What you need for fundraising:

Chairperson

The Chairperson oversees the citizen panel.

Duties:

- Organise the meetings.

- Write the agenda for each meeting.

- Be joint owner of the citizen panel's bank account.

- Make sure the panel meets the goals for each campaign.

Treasurer

The Treasurer looks after the citizen panel's money.

Duties:

- Be joint owner of the citizen panel's bank account.

- Look after the citizen panel's budget.

- Make sure that you spend money in the right way.

- Apply for any bids or community funds to get money for campaigns.

Secretary

The Secretary keeps the panel organised.

Duties:

- Look after the citizen panel's email account and reply to any emails.

- Write the notes on each meeting and give copies to the panel members after.

- Write the newsletter and send it out.

Other roles:

These roles are not needed to get funding, but they might help you reach your goals.

Vice Chairperson

Duties:

- Go to meetings and events when the Chairperson cannot.

- Help the Chairperson prepare for meetings.

- Help the panel meet their campaign goals.

Social Media Manager

Duties:

- Look after the panel social media accounts (like Facebook, Twitter, Instagram).

- Take photos and post them to tell people about what the panel is doing.

Fundraiser

Duties:

- Organise fundraising activities to get money for the panel and their campaigns.

Code of Conduct and Safeguarding

Code of Conduct

A code of conduct is a set of rules on how panel members should behave themselves during meetings and at events.

It is best that all panel members follow these rules:

- Respect the views of others and do not say bad things about them or to them.

- Make **reasonable adjustments** to make sure that all panel members can take part.

> **Reasonable adjustments** are changes that places and services can make to make sure everyone is able to use them. For example putting ramps in buildings for wheelchair users. Or giving information in easy read.

- Join in with panel meetings and get involved in campaigns.

- Talk with each other in person, by email and text message.

- Do what is best for the panel not what is best for you.

- Help the meetings go well and stick to the agenda.

- Be polite and respectful. Do not bully anyone.

- Follow safeguarding rules.

Safeguarding

Safeguarding means protecting someone's health and wellbeing. Especially children and adults most at risk, to make sure they can live without abuse or harm.

Disclosure and Barring Service (DBS) check

DBS Checks are a good idea if there will be events with children or adults most at risk.

A **DBS Check** is a check of someone's criminal record. To see if they are safe to be around people most at risk from harm.

All panel members should have a **DBS check** if 1 panel member is a child or an adult at risk from harm. This is the law.

NSPCC

The **NSPCC** has more information about safeguarding:

https://learning.nspcc.org.uk/safeguarding-child-protection/voluntary-community-groups

If someone tells you they are experiencing abuse or neglect, you have a duty to report it.

You must tell the police if the person is in danger.

All members should know about safeguarding and the laws about it.

Whistleblowing

Whistleblowing is when a worker tells a person in charge about something bad going on in their own workplace. It would be something that affect others, not only themselves.

The law protects **whistleblowing**. This means you must treat the person fairly and they cannot lose their job because they have reported their worries.

Consent

If panel meetings use video calls, and you record them, all people joining in must give their consent before you start.

Giving consent means you agree to something.

If the panel want to share photos or videos on social media, all the people in them must give consent.

If they are children, a parent or guardian must give consent. Consent in writing is best.

If the person does not give consent, you cannot use the photo or video, or you need to blur or cut out their face.

Risk assessments and running events

Risk assessments

A **risk assessment** is a check to see

- what risks there are

- how they could harm people

- and what we can do to lower the risk.

When planning an event, you should do a **risk assessment** of the place you are holding the event. This is so all panel members know what might go wrong and how to deal with risks.

You should do the **risk assessment** 2 weeks before the event.

There is a blank **risk assessment** in **Appendix 3**.

It is also best to complete an **event safety plan**.

This is a document that includes important details about the event, such as:

- How many toilets are there?

- Where are the fire exits?

- Who is in charge of first aid?

- Where is the fire assembly point?

It should include:

- A list of contacts including the Chairperson and the Vice Chairperson.

- A plan for if the event does not go as planned. For example, if there is a storm or if someone hurts themselves and you need to call the ambulance or police.

You should give the **event safety plan** and the **risk assessment** to all panel members.

This is so everyone is clear on what they need to do if something goes wrong.
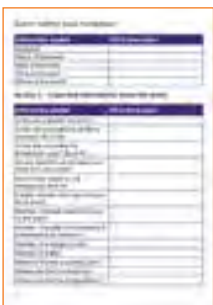
There is a blank **event safety plan** in **Appendix 3**.

Running events

There are lots of things to think about when planning and running an event. Some important ones are:

First aid

You need to keep the people you invite to your event safe.

Someone in your citizen panel should get first aid training to help if someone gets injured.

If a more serious injury happens, you should call 999 for an ambulance.

It is good to train 2 or more people so there is always someone available who can give first aid.

During the event, you should keep the First Aid Kit somewhere easy to access.

Or you can pay St John's Ambulance to provide first aid cover.

They have guides for different types of events:

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 your duty to lower the risk of a fire at your event.

You should do a **fire risk assessment** before the event. All panel members should know what to do if there is a fire so that everyone gets out safely.

Emergency service vehicles should be able to get to the event building.

It is important to make sure that you do not block the fire exits.

The path to each exit should be wide enough for

- wheelchair users and

- for a carer and a disabled person to walk next to each other.

Permits and permissions

You might need **permits** to run an event. A **permit** is an official document allowing you to do something. Check this early on in your planning.

It is a good idea to get **public liability insurance cover**. This insurance will cover the costs if people get injured or their property gets damaged at your event.

For more information on running a voluntary event, the Government has a guide here:

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.

> **Accessible** means your event is easy and safe to find and go to for everyone, whatever their needs are.

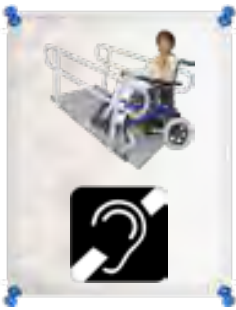When sending invites out, it is good to ask people to contact you about their needs if they have any, like:

• A British Sign Language interpreter.

- Food allergies or diet needs.

- A parking space close to the entrance.

On the adverts, make information about **accessibility** clear. Say if the venue has wheelchair access, if a lift is available or if there is a hearing loop.

This will make people feel welcome and more likely to attend.

It is a good idea to make a map showing where things like these are:

- disabled parking

- disabled toilets

- **accessible** emergency exits

- escape route for emergencies.

Some people may need information in a different colour, large print or in Easy Read.

If there are steps in the venue, you can hire a ramp.

It is good to have a quiet room. This can give people a space to relax, take medicine or take a break from the event and crowd.

During the event:

Volunteers can meet with people as they come in and show them to what they need, like disabled parking.

To help people using wheelchairs and mobility scooters make sure:

- gaps are wide enough

- tables are not too high for them to use

- the path to the fire exit is clear.

If there are people on stage, it is good to save seats for disabled people, carers, and interpreters at the front.

Costs

Doing an event can cost a lot of money.

The treasurer should set how much you can spend on the event. This is the budget.

They should make sure that all panel members know what the budget is.

Panel members worried about spending should tell the treasurer.

For volunteer events you could ask the local community to give equipment, food, drinks, money.

Getting volunteers to help at an event can lower costs.

Ask speakers and performers if they will do the event for free or at a lower rate.

Admin processes

Being open and clear

The panel should agree when to give the minutes from each meeting to members. This is so everyone is clear what they need to do next.

The Chairperson and Treasurer should tell the panel about updates on the campaign and budget at the start of each meeting.

You could write a newsletter to update people on your work. Sending it out every 3 months is good. Please look at **Appendix 2** for an example.

Conflicts of interest

A conflict of interest is when someone's personal life could affect their decisions as part of the citizen panel.

For example, choosing to pay a family member to speak at an event, would be a conflict of interest.

Any panel member must tell the Chairperson if they have a conflict of interest.

How to make a complaint

If a panel member has a complaint about another member of the panel, these are the steps:

1. Tell someone

Tell the Chairperson.

If the Chairperson is the person the complaint is against, tell the Vice Chairperson, Secretary or Treasurer.

They could solve the problem at this stage or move on to the next steps.

2. Complain in writing

If you are not happy after step 1, put it in writing and email or post it to the Chairperson.

Say who the complaint is against, when it happened and what the problem is.

The Chairperson should tell you they have got your complaint, and what they are going to do next.

3. Give proof

You should collect any proof about your complaint and give it to the Chairperson. It is best to write down the time and date of any calls, who you spoke to and what you and they said.

It should take 4 to 6 weeks to solve a complaint.

If there has been no contact after 4 weeks, ask for an update on your complaint.

4. The result – accept or appeal

If you are happy with the result of your complaint, you should accept it.

If you are not happy you can **appeal**. This is a formal way of asking for a decision to be changed.

You can **appeal** by asking another person to look into your complaint. You should do this in writing giving your reasons.

How to leave the panel

If you decide to leave the citizen panel you should put this in writing to the Chairperson.

It is good if you can go to the next panel meeting, so you can hand over your work to the rest of the panel.

You should give any panel documents, equipment, or records that you have back to the Chairperson.

If the Chairperson is the person leaving, they should put this in writing to the Treasurer or Secretary.

If the panel has a Vice Chairperson, they will become Chairperson until the panel votes for the new Chairperson.

The panel might decide to stop the campaign until a new Chairperson is confident in their role.

Unexpected life events

There may be a time when a panel member has an illness, so they cannot do their duties. Or a panel member might die.

It is important that the panel have plan for this.

It is best that the Vice Chairperson step in if the Chairperson is no longer able to run the panel.

So everyone can get the documents they need, they should be:

- on a shared computer drive that everyone can get to, or

- you should make photocopies and keep them in a safe place where another panel member can get them.

Review

A review of the citizen panel should happen after 12 months, or earlier.

It should look at the goals of the panel and how the panel is run and set up.

The Chairperson should do the review. They should pass on any notes or changes to the other panel members.

Before a review, it is best to hold a meeting where panel members can give their views.

The Chairperson should include all member's views when doing their review.

Hard words

Accessible

Accessible means your event is easy and safe to find and go to for everyone, whatever their needs are.

Reasonable adjustments

Reasonable adjustments are changes that places and services can make to make sure everyone is able to use them. For example putting ramps in buildings for wheelchair users. Or giving information in easy read.