

Recompense for People with Lived Experience Procedure

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PROCEDURE SUMMARY		
<p>This procedure sets out clear guidelines for recompensing people with lived experience.</p> <p>The procedure will ensure that all Trust staff are aware of the opportunities for recompensing people with lived experience who become involved in certain activities and the duty of care owed to staff members, service users and to people with lived experience themselves to ensure that any risks associated are minimised.</p> <p>The Trust monitors the implementation of and compliance with this procedure in the following ways:</p> <p>The implementation and compliance for the Recompense of People with Lived Experience Policy will be monitored by the Patient Experience Team</p> <p>The Patient Experience Team will provide assurance on the processes in place to the Patient and Carer Experience Sub Committee and the Quality Committee.</p>		
Services	Applicable	Comments
Trustwide	✓	
Essex MH&LD		
CHS		

**The Director responsible for monitoring and reviewing this policy is
The Executive Director of Strategy and Transformation**

ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST

RECOMPENSE FOR PEOPLE WITH LIVED EXPERIENCE PROCEDURE

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RECOMPENSE FOR PEOPLE WITH LIVED EXPERIENCE PROCEDURE

Assurance Statement

This procedure sets out the Trust's approach towards recompensing people with lived experience, ensuring the process is fair and consistent across the Trust.

It also aims to have in place the processes and tools to support the Trust and individuals with lived experience who wish to become involved in activities.

1.0 PURPOSE

The purpose of this procedure is to set out clear and robust procedures for reimbursement of expenses and recompense to people with lived experience who participate in involvement activities within, for or on behalf of the Trust.

The procedure seeks to set out:

- the process for recruiting, sustaining involvement and supporting people with lived experience prior, during and post an involvement activity;
- the appropriate governance around this process in order to assure people with lived experience and Trust staff who lead and take part in involvement activity;
- the ongoing development of involvement within the Trust, ensuring it is inclusive and accessible for all people with lived experience, ultimately fostering a strong and lasting culture of involvement in the Trust.

2.0 DIFFERENCE BETWEEN INVOLVEMENT AND VOLUNTEERING ACTIVITIES

The status of People with lived experience will be that of a volunteer because their involvement is purely voluntary, there is no obligation to accept any offer of involvement activity that may be made from time to time, and they will not be an employee or worker of the Trust. However, the key difference between involvement and volunteering activities is that involvement activities specifically require people with lived experience of Health and Social Care services within the Trust, and for some Involvement activities, People with lived experience may be offered a payment for recognition of their time and contribution. Volunteering activities do not require past experience of using services and do not have any option for being paid.

In general terms Involvement activities that can be recompensed follow the following guidelines:

- Chair of a meeting/training session or a co-facilitator
- Recruitment panel member
- Co-production for service improvement or transformation

This policy does not apply to the Buddy Scheme, a student training initiative run by Workforce Development and Training. The Buddy Scheme is organised in partnership with local universities and any recompense for involvement is administered separately.

3.0 RESPONSIBILITIES

This section outlines the responsibilities around the involvement process by who needs to do them:

3.1 Patient Experience Team (PET):

- Receiving involvement activities for advertising.
- Reviewing applications by Trust staff for involvement and deciding on appropriateness.
- Oversight of recruitment process by PET for people with lived experience including all appropriate checks e.g. DBS
- Sending letter of involvement to people with lived experience
- Supporting the promotion of opportunities available
- Advising on good practice in involvement of people with lived experience and promoting co-production.
- Liaison with services to help in understanding the value of involvement activities
- Conducting reviews offered to people with lived experience (either by telephone or online, as appropriate)
- Coordinating feedback from services and people with lived experience on the value of the activity
- Maintaining records of activity
- Maintaining records for each individual people with lived experience through the IT system.
- Reporting on involvement activity
- Promoting training and development opportunities for people with lived experience

3.2 Activity Lead:

- Completion of the involvement activity description form for people with lived experience for involvement activity (Appendix 1)
- Completing shortlisting and discussions/interviews
- Conduct local risk assessment
- Informal conversation with people with lived experience before confirmation of involvement activity as required.
- Agree and sign the Lived Experience Agreement (Appendix 3)
- Complete the Activity Evaluation Form (Appendix 4) and review/debrief with people with lived experience after activity

- Supervise/oversee and support people with lived experience throughout involvement activity
- Timely sign off of people with lived experience timesheets and expenses claims for remuneration such as travel costs (including budget codes)
- Feeding back of progress with activities to the PET, including raising any issues or concerns
- Complete and return feedback form to the PET

3.3 People with lived experience:

- All people with lived experience are expected to observe the rules of this policy
- All people with lived experience are expected to uphold the Trust values of Open, Compassionate and Empowering when taking part in an involvement activity.
- Agree and sign the Lived Experience Agreement (Appendix 3)
- Complete the payment details form in order to receive payment

3.4 Finance

- Timely processing of lived experience timesheets and expenses claims for remuneration such as a travel costs if required.

4.0 RECRUITMENT OF PEOPLE WITH LIVED EXPERIENCE

4.1 Benefits of completing lived experience activities

1. Gives a greater understanding and knowledge to service providers, such as EPUT in supporting vulnerable people with mental health conditions.
2. It helps to minimise and eliminate the stigma surrounding mental health
3. It improves service quality and delivery to all service users who use EPUT.
4. It benefits the Trust on inspections such as when the CQC inspect, as having service users engaging with service delivery improves the quality of care and support given by all staff members.

4.2 Recruitment

Services who identify an involvement opportunity will be asked to complete an Involvement Activity Description Form (Appendix 1) which will then be advertised in order for people with lived experience to be able to register their interest by submitting an application form.

Applications from people with lived experience wishing to work with the Trust will be processed by the Patient Experience Team to ensure that the involvement process is equitable and the data held on them is logged in compliance with the general data protection regulation 2016 (GDPR). They will then be passed to the service to complete the shortlisting process in line with requirements detailed in the involvement activity form. It may be necessary post shortlisting for an informal discussion/interview to take place.

4.3 Important points to involvement

People with lived experience who are participating must be given a copy of the Recompense for People with Lived Experience policy and procedure so they can make an informed decision as to whether they would like to participate.

The terms of involvement and level of support that will be provided must be agreed and confirmed in writing in a Letter of Involvement (Appendix 2).

Applicants will be required to produce identification, right to work in UK, references, and be subject to an Occupational Health check and may require a Disclosure and Barring Service (DBS) check dependant on the role.

Applicants who choose to receive payment will be required to complete and return their payment details on the form provided to them.

People with lived experience who are in receipt of benefits from the Department for Work and Pensions should seek advice as to whether acceptance of the offer of payment will affect their benefit entitlements or pension. If receiving benefits or a pension the Trust strongly encourages obtaining specialist information on welfare rights advice on benefit or pension conditions before agreeing to undertake Involvement activities for the Trust. The Trust cannot advise on this.

It is the Person with Lived Experience's responsibility to discuss and clarify this potential impact with their benefits or pension advisors and declare any payment and expenses received as necessary.

If people with lived experience have any concerns during the Involvement activity they can raise these at any time with either the Activity Lead or the Patient Experience Team.

People with lived experience will participate in Involvement activities on a purely voluntary basis. There is no intention for them to become employees or worker of the Trust.

4.4 Record keeping and Confidentiality

To enable People with lived experience to undertake activities within the Trust, EPUT is required to hold a record of some key information, in line with the Data Protection and Confidentiality Policy and Procedure for the following reasons:

- It enables us to ensure we hold contact details for people so that we can contact them about opportunities locally and nationally.
- It ensures we comply with legal requirements to ensure that anyone undertaking activities with the organisation is registered and, therefore, covered by the Trust liability insurance. The way we do this is to keep a record (as we do for staff and volunteers).

All people with lived experience will be able to request the information that the Trust holds on their record by submitting a Subject Access Request by contacting the Legal Services Team at SAR.epunft@nhs.net

By virtue of the nature of the work the Trust does, confidentiality and data protection are very important. People with lived experience are required to comply with the Trust policy regarding confidentiality, particularly with regard to information gained whilst undertaking Involvement activities with the Trust.

A clause regarding confidentiality is included in the Lived Experience Agreement (Appendix 3) for People with lived experience. Training on the Trust's confidentiality and data protection procedures will be provided to all People with lived experience to aid in this.

Failure to comply with Trust policy on confidentiality will unfortunately result in the Involvement activity being terminated with immediate effect.

4.5 Out of Pocket Expenses

All People with lived experience will be entitled to claim out of pocket expenses for;

- Reimbursement of Public Transport Costs (train or bus with receipts or tickets)
- Reimbursement of mileage – paid at 45p per mile (5p extra per mile per passenger who is a person with lived experience and taking part in the same activity)
- Reimbursement of parking (with receipt)
- Reimbursement for any expenses, including equipment/software pre agreed with the Activity lead as required for the involvement activity.

In exceptional situations expenses can be reimbursed on the day if this causes difficulties. However it is the responsibility of the Person with lived experience to make the Activity lead aware in advance that reimbursement is required on the day of the activity as this requires prior organisation.

People with lived experience will be required to complete a timesheet for the hours completed, which must be signed by the Activity Lead on the day and returned to the Patient Experience Team by no later than the Thursday of that week in order for payment to be processed within two weeks. If expenses have not been paid on the day then the appropriate section on the timesheet should be completed. These details are provided in the Letter of Involvement (Appendix 2).

If specific need(s) is/are identified, with prior agreement, the Trust may arrange transport to enable someone to take part in an Involvement activity. This will usually happen when:

- Public transport routes are not available to meet the starting time of the Involvement activity
- Involvement activity is being held in a location with there is no public transport routes
- Where the Person with lived experience has a disability (as defined within the Equality Act 2010) that prevents them from using public transport or driving.
- Where there is a cost benefit through ride sharing

Any concerns over transportation should be raised during the recruitment process for the Involvement Activity.

If an Involvement Activity is cancelled and the person with lived experience has not been informed or given enough notice, they are able to claim travel expenses for any travel costs incurred.

4.6 Involvement Reviews

It is envisaged that People with lived experience will take part in various Involvement activities as they arise from time to time. These will be discreet assignments and there will be no ongoing relationship between the Trust and the Person with lived experience in between Involvement activities. However, given that involvement activities are intended to be beneficial for each Person with lived experience and the Trust, it is expected that all People with lived experience will take part in a review (conducted via telephone or online, as appropriate). They will discuss their Involvement activity with a member of the Patient Experience Team including any particular concerns relating to the Involvement activity as well as any particular goals that they may have regarding lived experience.

5.0 FINANCIAL INVOLVEMENT RECOMPENSE

In addition to out of pocket expenses, People with lived experience may also be offered recompense for their contribution depending on the type of activity undertaken. Money will be given to a Person with lived experience for their contribution as follows:

5.1 Rate of recompense for those aged over eighteen

The EPUT Financial Involvement activity recognition payment rate is £11.31 per hour. Completed claim forms should be signed by the Activity Lead and returned (with cost code) to the appropriate department as instructed on the form.

As per section 4.3 individuals who are in receipt of benefits must seek advice themselves as to whether any amount of payment would affect their benefit entitlement.

5.2 For those under the age of eighteen

Vouchers are offered in line with Trust safeguarding requirements for ensuring the safety of children and young people. Vouchers are purchased in advance and provided by the staff member leading the activity in line with this policy.

Choosing not to receive recompense

People with lived experience may turn down the offer of payment if they do not wish to receive it. This will be confirmed through the completed Letter of Involvement (Appendix 2) prior to the activity starting. Whether or not they accept payment for undertaking an Involvement activity, their actual expenses incurred in doing so should always be reimbursed.

The Trust is required to give accurate details of recompense made to an individual if asked to do so by the Benefits Agency, Inland Revenue or Department for Work and Pensions. The Trust can accept no responsibility if People with lived experience who

agree to undertake Involvement activity with EPUT are penalised for failure to declare income.

6.0 STAFF RESPONSIBILITIES

6.1 Requesting people with lived experience:

As noted in section 3.2 staff who would like to request the involvement of People with lived experience should do so by completing an Involvement Activity Description Form (Appendix 1) and sending this to the Patient Experience Team to advertise.

15 working days' notice is required as a minimum in order to provide enough time to check availability. Further guidance on booking and supporting People with lived experience can be found in Appendix 3.

Applications received will then be sent to the Activity Lead for shortlisting and to arrange for a discussion/interview to take place.

Guidance for staff can be located under appendix 3 and a flowchart detailing the steps in the process is under Appendix 4.

7.0 SUPPORT AND ADVICE

The Trust will provide support to People with lived experience so that they can be properly involved in the activities of the Trust. This support will be provided by the appropriate member of staff or department as per this policy i.e. the Activity Lead and/or the Patient Experience Team. This includes providing stationery or materials that will assist People with lived experience to be involved in Trust activities, as well as hard/electronic copies of relevant policies and documents needed.

Trust staff will assist People with lived experience who need help in understanding the arrangements relating to their involvement and completing the forms to claim payments.

Support must also include access to any relevant or necessary training that People with lived experience need to undertake, in order to successfully carry out their Involvement activity e.g. recruitment and selection training in order to sit on a recruitment panel.

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