



Policy:

MD 022 – Public & Lived Experience Recruitment, Support, Payment & Reimbursement Policy

Executive Director Lead	Executive Director of Nursing, Professions and Operations
Policy Owner	Director of Quality
Policy Author	Director of Quality Head of Engagement and Experience

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Summary of policy

This policy provides the requirements to support the appropriate recruitment, induction and options for payment and reimbursement to ensure a good quality experience for involving the public and people with lived experience in the organisation.

The policy also outlines the support and supervision requirements that must be adhered to when involving people within the Trust.

Target audience	All staff who seek to involve the public and lived experience colleagues in Trust activity.
Keywords	Experts by experience; service user;

Storage & Version Control

Version V2 of this policy is stored and available through the SHSC intranet/internet. This version of the policy supersedes the previous version (V1). Any copies of the previous policy held separately should be destroyed and replaced with this version.

Version Control and Amendment Log

Version No.	Type of Change	Date	Description of change(s)
0.1	New draft policy created	June 2018	New policy commissioned by The Medical Director
1.0	Finalisation for endorsement	March 2020	Review by PGG and minor amendments of Appendices H & I. Update of Section 10 deadlines. Approval by QAC
2.0	Full Policy Review	November 2022	Updated to align with public sector tax laws. Introduction of Lived Experience Bank and principles for good quality involvement.

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1 Introduction

Sheffield Health and Social Care (SHSC) NHS Foundation Trust is committed to involving service users, carers, families and other members of the public. A range of mechanisms have been established through which such individuals can get involved.

This policy supports the Trust's commitment to meeting its legal responsibilities and involvement duties under Section 13Q of the NHS Act 2006 (as amended by the Health and Social Care Act 2012) and guidelines published by the Department of Health on Reward and Recognition payments (2006).

The policy sets out guiding principles and practice to encourage 'Public and Lived Experience Representatives' to be collaboratively involved in the work of SHSC through with a range of options for recognition. This is outlined in the involvement recognition structure and gives individuals options with regards to payment and recognition.

The policy sets out the requirements of individual teams who involve the public or lived experience representatives to appropriately recruit, induct and support those representatives.

The policy aims to strengthen the involvement of service users, carers, families and other members of the public in the design, delivery and review of services at SHSC by:

- Giving choice about the recognition and reward for specific roles undertaken to support the improvement of services and lived experience
- Ensuring that fair and equitable recruitment procedures
- Ensuring that SHSC employees and teams understand and deliver the essential support structures for Public and Lived Experience Representatives to work within the Trust aligned to the Trust Values
- Seeks to collate data on protected characteristics in order to demonstrate diverse representation;
- minimising the financial barriers that can prevent or discourage participation;
- fairly reimbursing people for out of pocket expenses incurred as a result of their direct and active involvement with work at SHSC;
- ensuring there is a single, consistent, equitable and transparent process for reimbursing individuals for their involvement;
- ensuring that all SHSC staff follow a consistent approach to reimbursing expenses and offering involvement payments when working with public voice representatives;
- defining activities for which people can be reimbursed;
- defining activities for which people cannot be reimbursed.

The policy seeks to enable active recruitment to a diverse and representative group of Patient and Lived Experience Representatives (PLERs) which reflects the rich cultural tapestry of the City of Sheffield. SHSC believes all citizens should be given the opportunity to participate within involvement roles and that this can form part of a recovery focused opportunity which may lead onto further opportunities including employment, volunteering and other such meaningful engagement across Sheffield.

Public and Lived Experience Representative Roles will usually be fixed to a maximum of two or three years dependent on the nature of the role. This is to ensure that opportunities are open to review, new voices, insights and experiences and provides a steady flow of recovery focused roles to a wide range of individuals. It should also be recognised that some people are purely seeking to “give something back”.

2 SCOPE

The policy applies to all service users, carers, families and other members of the public directly involved in the work of SHSC.

The policy complements the Trust’s ‘Volunteers Policy’, ‘Service User Engagement & Experience Strategy’ and ‘Carers & Young Carers Strategy’ and should be considered alongside these documents.

The policy does not cover employees, workers, Governors or agents of SHSC unless working outside the remit and scope of their employment role (i.e. working into lived experience roles with their contracted hours).

3 PURPOSE

The purpose of this policy is to ensure a transparent and consistent approach to the involvement of people in our services.

4 Definitions

Public and Lived Experience Representative (PLER) – includes patients, service users, carers, families and other members of the public that are involved with supporting the work of the Trust

Service User – a person who has lived experience of using health and social care services

Carer – a person who spends a significant proportion of their life providing unpaid support to family or friends. This could be caring for a relative, partner or friend who is ill, frail, disabled or has mental health or substance misuse problem.

Families – a person who is considered a member of the persons family and/or carer family.

5 Details of the policy

This policy explains how involvement should take place within the Trust to ensure a good quality experience for individuals who wish to support involvement and coproduction within the organisation.

The policy outlines the function of the lived experience bank and reimbursement system which ensures SHSC adheres to the legal and financial requirements as a public body in the payment of individuals for their time and experience.

The policy is also in keeping with the principles of best practice from the National Survivor User Network Principles for involvement (4Pi). 4Pi is a framework for the involvement of service users and carers – in our own care, in our communities, in service delivery and evaluation and in organisational governance and strategy. More information can be found on this link. <https://www.nsun.org.uk/projects/4pi-involvement-standards/>

6 Duties

Chief Executive is responsible for ensuring that the systems on which the Board relies to govern the organisation are effective.

Clinical Triumvirates are responsible for ensuring that all managers in their areas are aware of this policy and support its implementation, monitoring and assurance activity .

SHSC managers and front line staff are responsible for :

- Supporting the active recruitment of public and lived experience representatives within their services, aligned to this policy, ensuring all Public and Lived Experience Representatives are known to the central Experience and Engagement Team.
- Ensuring that the appropriate supervision and support is set up prior to Public and Lived Experience Representatives commencing work in the organisation.
- Ensuring that every Public and Lived Experience Representatives has a clear outline of their role and responsibilities. A template can be found in Appendix 3
- Clarifying **PRIOR** to any work taking place whether the person wishes to undertake work as a volunteer or as paid activity on the lived experience bank.
- raising awareness of this policy within their area of work;
- providing financial details and approval for all involvement payments to be authorised via the Lived Experience Bank in accordance with this policy;
- providing relevant information promptly to the Engagement & Experience Team to support accurate quarterly reporting to Trust groups/committees on use of the Policy;
- noting that co-production costs should be factored into clinical and project budgets.

The **Trust Lived Experience and Engagement Team** will:

- ensure awareness of this policy and attached procedures is raised with patients, service users, carers, families and other members of the public;
- provide appropriate advice and support to all those involved in the process;
- Manage the Lived Experience recruitment process on behalf of the Trust and working in conjunction with SHSC team managers;
- Support clinical and corporate teams to manage payment via the Lived Experience Bank;

- monitor the range of involvement activity;
- provide quarterly updates to Lived Experience and Coproduction Assurance Group;
- regularly liaise with the SHSC HR and Finance Departments to ensure appropriate and efficient payments;
- ensure consistency and equity in implementation of this policy across the Trust.
- Manage the central Lived Experience Involvement budget to ensure lived experience roles are paid across SHSC central governance meetings and groups.

Public and Lived Experience Representatives will:

- complete and submit relevant forms to claim out of pocket expenses in accordance with this policy;
- recognise that involvement roles may be allocated for a time specified period (Co-Chair roles or group membership) OR be open to a number of individuals (interview panels) and will be open for any PLER to become involved throughout the course of time.

7 Procedure

7.1 Eligibility and Available Roles

We recognise and value a diversity of input and roles. SHSC has identified four different types of roles of public and lived experience involvement:

Volunteers – SHSC has a vibrant volunteer community which is governed through the Engagement and Experience team. Volunteers are managed under the Volunteer policy.

Lived Experience Involvement Roles – these are roles which are open to individuals with lived experience only.

Individuals are recruited to actively contribute to the development, leadership and decision making in the organisation. The roles can include interviewing for jobs in the Trust, membership of governance groups, co-chairing or chairing roles, designated lived experience councils etc. There will be clear responsibilities for the role and they will be advertised via the Trust website. Roles can be undertaken either in a paid capacity or as a volunteer. Individuals will be subject to recruitment checks and a full induction and training will be required.

Substantive Posts – SHSC supports all services and teams to consider the development of substantive roles which are dedicated to focussing on Lived Experience. Individuals may be recruited and employed aligned to standard Trust policies and have line management within their direct team or recruited with a third sector organisation through partnership working.

Visiting Professionals -

The final category is visiting experts, this group of individuals may take on paid or unpaid roles to come and work with us. Some examples are below :

- i) A Carer wants to share their story at Board or in a team development day. They do not want to charge us and will attend one workshop. They do not have access to any trust information or documents. No training or checks are required. The arranging manager is responsible for their wellbeing.
 - ii) A person with lived experience wants to speak at a conference we are holding, they attend the day without charge and give their experience. They do not have access to any trust information or documents. No training or checks are required. The arranging manager is responsible for their wellbeing.
 - iii) A person with lived experience is asked to speak at an event and wishes to charge for this one-off event. They will be required to invoice us; this will require all the routine invoicing details and will ask them to confirm that the earnings are to be shared with the Tax Office. We will look for their sole trader or company business tax code to validate this invoice. This is no different to any other private business who charge for their time. Many professional lived experience colleagues are sole traders who manage their own business. They do not have access to any trust information or documents. No training or checks are required. The arranging manager is responsible for their wellbeing.
- The role level should be discussed and agreed collaboratively between the Public and Lived Experience Representatives and the person organising the activity prior to Public and Lived Experience Representatives involvement.

7.2 RECRUITMENT

All volunteers and Lived experience roles on the bank will be recruited through the same methodology.

Individuals must be recruited through a values-based approach with an interview panel of at least two individuals. Reasonable adjustments must be made to support any potential PLER to participate in the process. Aligned to the Accessible Information Standards, information must be available in a range of formats and languages to invite participation in recruitment.

Recruitment should support a diverse population of PLERs and targeted recruitment through community groups and third sector organisations is welcomed to support representation of the citizenship of Sheffield.

On successful appointment details must be forwarded to the engagement team for processing with References, basic Disclosure and Barring Service checks and Occupational Health (see flowchart in appendix 4)

Where appropriate adaptations can be made to support recruitment for individuals who may not have access to referees and routine DBS identity documents. This will be discussed at an individual level with the person and the recruiting manager.

At the point of recruitment, the manager should discuss both volunteering and paid opportunities. Individuals can register for both volunteer and paid roles. This is explored in more details under section 7.7

7.3 INDUCTION

Volunteers and Lived Experience Roles on the bank will be inducted through the same approach.

The following minimum standards will apply

- Information Governance training
- Confidentiality training
- Safeguarding Adults and Children Level 2 online training
- Boundaries training

This training is aligned with the job description for volunteers and lived experience roles having contact with staff, service users families and carers but no access to clinical records, clinical meetings or groups where treatment, diagnosis or other highly personal details would be discussed by professionals.

Boundaries training will support understanding of how to manage information and therapeutic relationships which are likely to be shared during the course of work.

A separate procedure is available that gives more information on the induction process. Please contact the engagement team for a copy

7.4 ROLE INITIATION, LINK PERSON AND SUPERVISION

At the point of engaging a Public or Lived Experience Representative in work with the Trust it is essential that the following steps are undertaken and documented :

- A role outline which summarise the duties and responsibilities for the person (appendix 3)
- Identify a supervisor to whom the individual will receive supervision on an agreed timescale (to be no less than every 3 months)
- Identify the link person to whom the individual will report to whenever they are undertaking the role (supervisor and link person may be the same person if appropriate)
- Agree any payments and re-imbursments (paid or volunteer role / are expenses applicable)
- Confirm the expected hours, duration of tenure, days of the week. For lived experience roles it is likely to be a tenure of no more than 2 years in the same role.
- Agree any additional resources or environmental needs. For Public and Lived Experience Representatives s who are expected to join meetings and contribute to discussions via online forums and utilise papers; the manager is expected to consider how this will take place so that the person is not disadvantaged. Some best practice examples of supporting people in meetings is given in appendix X.

- Managers must make sure **reasonable adjustments** are made for Public and Lived Experience Representatives as we do for substantive staff and patients/carers to ensure they can contribute in a meaningful way to their work
- Send a copy of the agreement to the engagement team for central recording.

7.5 ONGOING DEVELOPMENT

It is essential that whenever involvement work is to commence that the Public and Lived Experience Representatives and the link person agree the potential hours, type of work and support available to the person in order that they can carry out their role.

Additional training may be required for specific duties, for example interviewing. All panel members should be briefed on the values based recruitment approach and understand the interview process including question setting and scoring mechanisms.

7.5.1 Pre meeting briefing

It is essential that all new involvement opportunities offer a pre meet. The purpose of the pre meet is to meet key members of the team or group that the Public and Lived Experience Representatives will be working with.

The Pre – Meet should outline any key governance (rules) and papers or information that will help the work to run smoothly.

The pre meet will give the Public and Lived Experience Representatives the opportunity to ask questions, to understand how they can contribute to the work and what boundaries may be in place. This is best served in the pre meet than in the actual working group or event.

An example of a pre-meet is interviewing. A pre meet must take place to ensure the Public and Lived Experience Representatives has had opportunity to contribute to the process, test out their questions, understand how the process will run.

Pre-meets are a requirement for any governance meetings where a Public and Lived Experience Representatives is co-chairing. As co-chair it is mandated that the agenda timings, aims of the papers and how to manage key topics is discussed prior to the meeting. The co-chairs should agree together how they will run the meeting and how they will support each other to deliver a good meeting outcome

7.5.2 Post meeting debriefing

It is good practice to offer all Public and Lived Experience Representatives a debriefing after meetings/events. This gives opportunity for reflection and questions regardless of role. This may be offered individually or as a group.

Once the workplan has been running for some time, it may be appropriate that the individual no longer requires debriefs but this must be agreed individually.

7.5.3 Development and Leadership

As Public and Lived Experience Representatives become confident in role, they may wish to take on more challenging roles and develop leadership skills in particular work areas.

The appropriate link person/supervisor should support those discussions and consider opportunities for the Public and Lived Experience Representatives to integrate into broader development where appropriate.

The Engagement and Experience Team will offer occasional workshops and development opportunities for all Trust Public and Lived Experience Representatives.

7.6 EXPENSES

Potential out of pocket expenses should be identified and agreed beforehand, wherever possible.

Out of pocket expenses should be met by the service which directly benefits from the involvement of PLER. The engagement team can advise on how to claim these expenses.

Out-of-pocket expenses may include :

- Bus fares
- Taxi
- Mileage for private cars, motorcycles and bikes
- Rail
- Subsistence costs – food and overnight accommodation
- Carers and childcare costs
- Other reasonable costs with prior agreement eg interpreters and communication support

7.7 Lived Experience Bank:

- All roles on the bank are classed as Band 4 (Agenda for Change). This is based on a generic job description to support recruitment.
- Where a role goes beyond the responsibilities and duties aligned to the job description at Band 4, the recruiting service or manager should develop a new job description and progress to panel.
- Where a role requires preparation and follow up (for example co-chairing work) this **must** be included in the funded hours of work. It would be usual to support 2 hours preparation and reading for a 3 hour Committee, in addition to 30mins for pre meeting and 30mins post meeting. Therefore in this example 6 hours paid work would be supported as a co-chair of the committee.
- Out of pocket expenses will be reimbursed in addition to the above costs in accordance with Appendix G of this policy.

Public and Lived Experience Representatives can choose to work in these roles as volunteers if this better suits their circumstances. This should be documented on the role agreement and reviewed at regular intervals.

7.8 Benefits

- If you are receiving state benefits, there may be certain conditions that you need to stick to and the payment amount you can receive may be restricted. It is important that you are aware of these restrictions before you agree to be paid for involvement.
- The provision of payment of care costs will be regarded as taxable income and may affect a person's benefits. Further advice and information can be obtained by visiting the SCIE website <https://www.scie.org.uk/co-production/supporting/paying-people-who-receive-benefits> or contacting the Benefits Agency (Benefits Team: 0114 273 6777)
- SHSC staff are unable to offer specialised advice on how payment for involvement may affect your state benefits, but will happily signpost you to the appropriate support agency.

6.6.1 Sheffield Citizens Advice can provide specialist advice and support. This is externally funded and provided outside of the responsibility of SHSC. The service can be contacted via phone on 03444 113 111 (calls charged the same as calling 0114 numbers; advisers are happy to offer call-backs to any client that requests one) or via their website <http://www.citizensadvice.org.uk>.

7.9 Data Protection and Information Sharing

SHSC adheres to the General Data Protection Regulation (GDPR) in the collection and retention of personal information. All records will be held in accordance with this Act

8 Development, Consultation and Approval

Consultation on this policy took place between a number of lived experience workers by undertaking a number of sessions Trust wide and team based, with service users and staff.

9 Audit, Monitoring and Review

Monitoring Compliance Template						
Minimum Requirement	Process for Monitoring	Responsible Individual/group/committee	Frequency of Monitoring	Review of Results process (e.g. who does this?)	Responsible Individual/group/committee for action plan development	Responsible Individual/group/committee for action plan monitoring and implementation
Annual Review of compliance to Policy	Report to demonstrate : Numbers of PLERs registered. Activity of PLERs via Bank Read across with Volunteer Policy	Lived Experience and Coproduction Assurance Group (LECAG)	Annual	Head of Experience and Engagement	Engagement team	LECAG
Satisfaction Survey	PLER satisfaction Survey to be undertaken at least every 6 months	LECAG	6 monthly	Head of Experience and Engagement	Engagement Team	LECAG

*Policy documents should be reviewed every three years or earlier where legislation dictates or practices change.
Review date: April 2024*

10 Implementation Plan

Action / Task	Responsible Person	Deadline	Progress update
Prepare a video to share with staff on the policy and range of roles	Teresa Clayton Mia Bajin	April 2023	In progress
Work with existing experts by experience to ensure they have role plans aligned to the new policy	Teresa Clayton Mia Bajin	April 2023	In progress
<i>Engagement team to share the new policy and requirements with teams on visits</i>	Teresa Clayton Mia Bajin		

11 Dissemination, Storage and Archiving (Control)

Version	Date added to intranet	Date added to internet	Date of inclusion in Connect	Any other promotion/ dissemination (include dates)
1.0				
2.0	December 2022	December 2022	December 2022	N/A

12 Training and Other Resource Implications

- 1.1. All staff newly appointed to the Trust will receive information about this Policy and the best practice requirements to involving people. In addition the Engagement Team will be available to work with staff on any training needs relevant to this policy.

13 Links to Other Policies, Standards (Associated Documents)

More information on recruitment procedures can be found here on Jarvis
<https://jarvis.shsc.nhs.uk/search?keywords=recruitment+policy>

More information on staff networks and lived experience opportunities can be found here
https://jarvis.shsc.nhs.uk/search?keywords=staff+networks&audience=All&type=All&sort_by=search_api_relevance

14 Contact Details

<i>Title</i>	<i>Name</i>	<i>Phone</i>	<i>Email</i>
Director of Quality	Salli Midgley	07951 61 2968	Salli.midgley@shsc.nhs.uk
Head of experience (Interim)	Teresa Clayton		Teresa.Clayton@shsc.nhs.uk
Engagement and volunteer manager	Mia Bajin	01142 263 367	Mia.Bajin@shsc.nhs.uk

Appendix 1

Equality Impact Assessment Process and Record for Written Policies

Stage 1 – Relevance - Is the policy potentially relevant to equality i.e. will this policy potentially impact on staff, patients or the public? This should be considered as part of the Case of Need for new policies.

NO – No further action is required – please sign and date the following statement.
I confirm that this policy does not impact on staff, patients or the public.

I confirm that this policy does not impact on staff, patients or the public.

Name/Date:

YES, Go to Stage 2

Stage 2 Policy Screening and Drafting Policy - Public authorities are legally required to have 'due regard' to eliminating discrimination, advancing equal opportunity and fostering good relations in relation to people who share certain 'protected characteristics' and those that do not. The following table should be used to consider this and inform changes to the policy (indicate yes/no/ don't know and note reasons). Please see the SHSC Guidance and Flow Chart.

Stage 3 – Policy Revision - Make amendments to the policy or identify any remedial action required and record any action planned in the policy implementation plan section

SCREENING RECORD	Does any aspect of this policy or potentially discriminate against this group?	Can equality of opportunity for this group be improved through this policy or changes to this policy?	Can this policy be amended so that it works to enhance relations between people in this group and people not in this group?
Age	No	Utilising the coproduction standards, this policy can support the recruitment of people of all ages	
Disability	No	The policy outlines the clear needs to make reasonable adjustments to support the recruitment, induction and development needs of people with a disability	
Gender Reassignment	No	Utilising the coproduction standards, this policy can support the recruitment of people who are undergoing gender reassignment	
Pregnancy and Maternity	No	Utilising the coproduction standards, this policy can support the recruitment of women	

Race	No	Utilising the coproduction standards, this policy can support the recruitment of people of all race and ethnically diverse backgrounds.	
Religion or Belief	No	Utilising the coproduction standards, this policy can support the recruitment of people of all religions and beliefs	
Sex	No	Utilising the coproduction standards, this policy can support the recruitment of people of all genders	
Sexual Orientation	No	Utilising the coproduction standards, this policy can support the recruitment of people of all sexual orientation	
Marriage or Civil Partnership	No		

Please delete as appropriate: no changes made.

Impact Assessment Completed by: salli midgley Name /Date 18/03/2022
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Appendix 2

Review/New Policy Checklist

This checklist to be used as part of the development or review of a policy and presented to the Policy Governance Group (PGG) with the revised policy.

		Tick to confirm
Engagement		
1.	Is the Executive Lead sighted on the development/review of the policy?	Yes
2.	Is the local Policy Champion member sighted on the development/review of the policy?	Yes
Approval		
3.	If the policy is a new policy, has the development of the policy been approved through the Case for Need approval process?	Not applicable
4.	Is there evidence of consultation with all relevant services, partners and other relevant bodies?	Yes
5.	Has the policy been discussed and agreed by the local governance groups?	Yes
6.	Have any relevant recommendations from Internal Audit or other relevant bodies been taken into account in preparing the policy?	Not applicable
Final Checks		
7.	Has the version control/storage section been updated?	Yes
8.	Is the policy title clear and unambiguous?	Yes
9.	Is the policy in Arial font 12?	Yes
10.	Have page numbers been inserted?	Yes
11.	Has the policy been quality checked for spelling errors, links, accuracy?	Yes

Appendix 3

Template for Patient and Lived Experience Representative Role Outline

Name of Representative

Outline of Role/ work / group

Estimated Hours/ Days of the week and time commitment (include reading time/ pre meets and debriefs)

Link person for this piece of work /group / role

Supervisor

Are any additional training/ support needs or reasonable adjustments required

Is this an Adhoc role (as and when)
Yes/ No

If applicable how long is the role available to this person (for regular meeting roles this is no longer than 2 years by the same individual)

Is the representative undertaking this role via the Lived Experience Bank ?
Yes/No
Confirm the budget for costs
If no : confirm the representative is volunteering
Yes/no

Is the representative able to claim expenses ?
Note the type of expenses and ensure the claim form is provided

Date of Agreement

Signed/ email agreement
Link Person

Representative

Appendix 4

