

## Reimbursement of Involvement Expenses Policy

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### 1. Introduction

Avon and Wiltshire Mental Healthcare Partnership NHS Trust recognises working collaboratively with service users, carers and the public to be central to the way that we work. We are committed to ensuring that involvee voices are at the heart of shaping our healthcare services and we actively seek service user and carer input to inform and improve our work. We will do this through a wide range of approaches to ensure we are inclusive of our service users and carers and we value the significant contribution that involvees can make in improving the services delivered at AWP.

AWP actively seeks to involve service users and carers ('involvees') collaboratively:

- in a range of activities and roles
- throughout its areas of work
- at all possible stages.

### 2. Purpose

This policy defines the Trust's approach to the payment of reasonable out of pocket expenses incurred by involvees when engaging in involvement activities Trust-wide, and defines occasions when reimbursement for certain involvement activities is payable. It ensures that all involvees will experience the same approach wherever they are involved in the Trust.

### 3. Scope

This policy has been written for AWP staff to implement, and guidance and forms are appended in this document. The policy applies to all involvement activity undertaken Trust-wide, within all locality delivery units and corporate service departments. AWP actively seeks involvee input to inform and improve the work that we do, through a range of approaches and activities, some of which will be reimbursed for out of pocket expenses and others rewarded through personal development and seeing service improvements. There are a number of ways that that involvement can be recognised: being thanked, receiving written acknowledgement for activity undertaken, getting support to develop skills, experience, understanding and hearing about improvement made as a result of involvee input. There may be certain circumstances where AWP may make involvement payment to involvees to recognise a specific level of skill, knowledge and responsibility they bring to defined work or projects. Budget to support this will be identified by the LDU/team that is commissioning and supporting the involvement activity or opportunity before it starts.

The Trust believes that involvees should not be out of pocket as a result of their activity with us, so reasonable travel expenses will be reimbursed when incurred whilst being involved.

### 4. Definitions

**Involvee:** an individual, who may be a service user or carer, taking an active role in involvement activities with the Trust

**Involvement:** the active participation of an involvee in any area of work led by the Trust

**Involvement activity:** any Trust-led and agreed task undertaken by an involvee

**Expenses:** Travel costs incurred in undertaking the involvement activity and other reasonable expenses by prior arrangement on production of receipts.

**Involvement Payments:** recompense received in addition to expenses in defined and specific circumstances where an involvee has been invited as expert advisor.

**Benefits:** payments made to an individual from the Department of Work and Pensions.

## 5. Reimbursement of involvees

The Trust values involvees and seeks to enable involvement opportunities where possible. Many people might choose to become involved in AWP's work for an opportunity to learn a new skill, gain experience, make a contribution, meet new people and learn new skills.

These opportunities are set out in level 1 of the table overleaf; an involvee can nominate themselves for these.

Sometimes, the Trust will need or want to gain significant insight, input or skills in a particular area from an involvee. There will usually be a selection procedure for this type of role, and an appointment process. Where an involvee has been asked to participate in an activity because they have a specific skill set or experience they will be offered recognition in recognition of the significant input they provide. This could include taking part in focused project work or acting as associate trainer for example. The level of payment will be agreed beforehand between the involvee and local involvement coordinator before the activity begins and there will be a level of expectation that the involvee will be able to commit to this for an agreed period of time.

Deviation from this policy will be monitored by audit. In special circumstances, there is scope for some local variation. This is at the discretion of the LDU Clinical Director, or Department Head as appropriate, where the Department or LDU feels that a particular project requires a different approach. This will be agreed in advance, and AWP Leads should ensure that sufficient provision is available within the project budget to support this situation. The involvee expenses should be coded to that project, department or locality cost centre and processed promptly.

AWP values and encourages diversity, and seeks a representative range of involvement partners to take part in these activities.

### 5.1 Levels of recognition

Recognition will be made to involvees taking part only in those activities the Trust has defined as involvement activities within this policy.

The table overleaf defines the levels of involvement and the types of involvement this covers. The level of activity will depend on whether any recognition is granted.

### 5.2 Expenses

Travel costs will be claimable for all involvees. These usually include car mileage, car parking, and public transport only.

Taxis are not usually considered public transport. They can only be used where public transport is not available or there is a specific need such as personal safety or disability. If a taxi is required, this must be agreed with the local involvement coordinator before the journey needs to be made.

### 5.3 Involvement Agreements

Involvement agreements will be put in place for all involvees who are in receipt of reimbursement. The involvement agreement is a simple record of what is expected from the involvee and the Trust. Where recognition is made, help will be provided to assist involvees in providing documentary evidence to the relevant benefits agencies as appropriate. The involvement agreement will be coordinated by the Locality Involvement Coordinator.

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Levels	Types of involvement	Recognition
<b>Rewarded by experience</b>		
<p>Level 1</p> <p>Informing people</p> <p>Seeking feedback and opinion. Being consulted.</p> <p>Collaborative working in decision making</p>	<p>Members receiving mailings and attending conferences and seminars .</p> <p>Taking part in consultations and surveys.</p> <p>Membership of Trustwide groups.</p> <p>Member of Council of Governors once AWP becomes a Foundation Trust.</p> <p>Readers Panels</p>	<p>Gaining knowledge and learning about mental health; social contact and feeling part of the local community.</p> <p>Sharing experiences, having a voice and feeling heard, influencing change and services.</p> <p>Opportunity to share experience and 'give something back'.</p> <p>Receiving an acknowledgement in writing.</p> <p>Support to develop skills and experience.</p> <p>Seeing/hearing about the improvements made as a result of input.</p> <p>Short term work experience to support service users, who are ready to think about returning to paid employment.</p>
<b>Reimbursed</b>		
<p>Level 2</p> <p>Working together in partnership</p>	<p>Participating in recruitment and selection of staff interview panels.</p> <p>Co-production of a Trust policy for which a service user has a particular specialist interest</p> <p>Taking an active part in reviewing outcomes associated with complaints panels</p> <p>Giving specialist talks by invitation, related to specialist experience and interest</p>	<p>£12 per hour.</p> <p>Appropriate skills training.</p> <p>References for employment.</p>
<p>Level 3</p> <p>Independent activity</p>	<p>Short term contracts, for defined and specified projects which are supported by locality management teams and/or corporate departments.</p> <p>For example reference groups service redesign, improvement projects. These will be time limited.</p> <p>Learning and Development Associate Trainers– Providing Courses to assist in or lead Staff training for example at the Recovery College</p> <p>Providing training at staff induction</p>	<p>These activities may receive an involvement payment depending on the activity, skills and input required.</p> <p>A level of commitment will be required of the involvee who will be recruited for the relevant activity based upon experience and expertise.</p> <p>Localities will decide any recognition on a case by case basis.</p> <p>Involvement agreements will be developed.</p>

## 6. Roles and responsibilities

### 6.1 Chief Executive Officer

Has overall accountability for ensuring that appropriate systems are in place to remunerate those taking part in involvement activity where appropriate.

### 6.2 Director of Nursing and Quality

Has delegated accountability for ensuring that the management staff responsible for involvement have the systems in place for payments, and that they are applied throughout the Trust in a consistent manner.

### 6.3 Locality Management Teams

Have responsibility for ensuring that Locality Involvement Coordinators (LICs) are adhering to the policy and raising any non-compliance as part of regular supervision. Local teams are responsible for clearly explaining the policy to involvees and for consistently applying it.

### 6.4 Locality Involvement Coordinator (LIC)

Has responsibility within their locality for:

- Ensuring that involvees have sight of the policy and documents in advance of an event/meeting
- Receiving the claims returned following the event
- Checking claims are appropriate and in line with this policy
- Maintaining an audit log of claims made and associated receipts. This is essential for robust financial governance procedures and centrally maintained internal audit evidence.
- Ensuring claims are processed in a timely manner via the processes in place.

### 6.5 Involvees

Have responsibility for ensuring that they comply with this policy and its appendices, completing and submitting any claims for expenses within 3 months of them being incurred. This may be extended in exceptional circumstances at the discretion of the locality management team. Evidence of expenditure is required for example rail travel tickets. It is important that the individual is aware that paid involvement could affect any benefits that they may be in receipt of, and result in the loss or reduction in the amount of benefits they may receive.

It is the responsibility of the individual to ensure they understand and comply with the conditions of any benefits they are in receipt of and to notify the relevant agencies as appropriate.

## 7. Employment

Recognition for involvement is not the same as or equal to paid employment by the Trust.

Service users, carers, members of the public, and members involved in Trust activities are not, and should not be seen as or referred to:

- as members of staff
- as working for the Trust.

There is no contract of employment between the individual and the Trust.

As per HMRC IR35, all involvees are registered with the Trust and reimbursed via payroll.

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Where an involvee is in receipt of state benefits it is their responsibility to declare all recognition made and to seek guidance from their Benefits Office if in doubt. An involvement agreement outlining this information to involvees is provided. Involvees should be made aware that we can provide template letters to present to the benefit agency outlining and clarifying the nature of their involvement.

### **8. Monitoring**

The LIC will ensure that all localities and corporate areas are compliant with the policy through regular audit checks of claims made locally. A rolling programme will be developed with the finance department for sampling to take place.

The sampling will involve picking a number of randomly selected claims on a quarterly basis and checking for adherence to policy. Any non-compliance will be reported to the appropriate management team. The expected response will include:

- Date raised with individual
- Remedial action taken
- Date for future review.

### **9. Associated documents**

Staff can access the forms and guidance associated with this policy via Ourspace.

<b>Version History</b>				
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