

EXPERTS BY EXPERIENCE

**REWARD AND RECOGNITION GUIDELINES FOR SERVICE
USER AND CARER ENGAGEMENT**

Faculty of Health and Wellbeing

Sheffield Hallam University

May 2014

Acknowledgements

This report was written by Rachel Hawley and Hazel Horobin.

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"Plans are nothing; planning is everything." Eisenhower (1890-1969)

Foreword

'The NHS belongs to us all.' The NHS Constitution for England (2013)

Health and social care services are more likely to deliver better quality care and experience, if health and social care professionals receive education and training that has been designed, delivered and quality assured with the involvement of patients and the wider public. We are committed to the development of the necessary systems and processes that ensure genuine engagement at every level of the Faculty's business.

This means our staff, students and service users working together as a shared endeavour. This document sets out the Faculty's underpinning principles for 'involvement' and offers guidance to ensure flexible and fair reward and recognition. This is an important step along our journey towards staff, learner and public shared engagement and this simply being 'the way we do things around here'.

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Purpose of the Document

A report commissioned by the Faculty of Health and Wellbeing in 2013 provided a key message that whilst there were some excellent examples of good practice, overall engagement of service users and carers in health and social care education was patchy. This situation also reflects the national picture more widely (Beresford and Andrews, 2012). A lack of clarity about reward and recognition processes to support service user and carers engagement was highlighted as an issue. This document aims to ensure that the public are appropriately recognised and rewarded for their contributions to the Faculty of Health and Wellbeing.

Who is this document for:

- staff who engage or who want to engage with service users and carers through a range of activities including for example, teaching and learning, research, quality assurance;
- service users and carers* who are supporting current activity, or who may be interested in supporting Faculty activity in the future.

The guidance is in two parts:

Part A - outlines the core principles that underpin the Faculty approach to supporting service user and carer engagement showing where and how involvement might occur;

Part B - provides the key steps to support appropriate reward and recognition for service user and carer contributions. Links to further information and resources are included in the appendices.

Contact Information

For enquiries or feedback contact: Jean Flanagan J.Flanagan@shu.ac.uk We would welcome your feedback on this document as our work continues.

* There are many terms used to describe people who use health and social care services whilst they contribute to health and social care education. Examples include; services users, patients, carers or consumers; each makes a contribution towards developing a rounded definition of the role they play in health and social care education. We have chosen to use the term 'Experts by Experience' to represent their engagement within the Faculty of Health and Wellbeing and this includes both service users and their carers.

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Part A: INVOLVEMENT PRINCIPLES AND PRACTICE

This section outlines core principles that underpin the Faculty approach to support Experts by Experience engagement; putting principles into practice.

'Patient involvement means more than simply engaging people in a discussion about services. Involvement means having the patient voice heard at every level of the service, even when that voice is a whisper'
A Promise to Learn, A Commitment to Act, (August 2013)

1. Introduction

We want to make sure that engaging people; public, students and staff, is part of the way we work. We want involvement to happen at every level of what we do. This means we must actively involve people in our work in new ways. To do this we need to make sure that we work together in all sorts of ways, changing relationships by shifting the emphasis away from doing things for people, to doing things with them.

2. A Shared Commitment

2.1 What do we mean by engagement?

By 'engagement' we mean working with staff, learners and the public as equal partners in decision-making underpinned by the principles of co-production. This has an important part to play in ensuring that students receive the highest quality training. This will help ensure the best possible quality of care and experience for people using health and social care services, now and in the future.

Effective engagement therefore influences; the future workforce (which professionals we will need where, when and why through commissioning), future healthcare education and training (deciding on what courses look like through design), delivery (being involved in the course) and review (checking what has worked well and what can be improved).

2.2 Different Language, Shared Principles

The idea of service user and carer engagement is not new. The evolution of service user and carer engagement in health and social care education reflects how

involvement is an important lever for change and influence for future health and social care services. It follows that new approaches, systems and processes are needed to make this happen.

The national policy, the systems, structures and processes that guide and support involvement highlight differences in terminology and approaches according to the context. However underpinning engagement is a set of values and principles that can be shared. A summary of the key policy and legislative documents that have promoted change can be found in Appendix 1.

3. Our principles for engagement

A set of core or underpinning principles have been developed to support the involvement of Experts by Experience. These principles have been developed through the Faculty for Health and Wellbeing Experts by Experience Development Group, building on the Faculty's earlier engagement activities.

3.1 Core principles of involvement:

Put simply, there should be:

A clear reason and purpose for engagement, using principles of shared decision making between staff, students and the public;

Appropriate engagement in education and research with people who use health and social care services, agreeing flexible ways in which people can contribute to Faculty work;

Clear responsibility and accountability agreed through partnership working to develop priorities through shared decision making;

Value and recognition for the contribution of all stakeholders in the Faculty of Health and Wellbeing including 'experts by experience', students and staff;

Informed changes using what we have learnt through the engagement of staff, learners and experts by experience to influence changes in our ways of working to achieve better outcomes;

Harnessing the potential for people to be involved, by identifying and overcoming any barriers to involvement.

Table 1. Principles of engagement adapted from the previous work by Skills for Care and The Commission of Social Care Inspection (England) as well as the General Social Care Council and Social Care Institute of Excellence (UK)

4. Putting the principles for involvement into practice

4.1 Where can involvement happen in the Faculty of Health and Wellbeing?

Staff, students, experts by experience and organisations representing experts can get involved with the Faculty through a wide range of activities, including;

1. Teaching and learning
2. Research in health and social care
3. Organisational development
4. Quality assurance and governance

The diagram below illuminates how these different activities are interlinked:



Figure 1. How teaching, research and Faculty functions relate to produce high caliber health and social care professionals

The next section outlines what is involved for each of these three Faculty activities and shows how experts by experience might be involved for each activity:

Theme	kind of activities	suggested approaches
Teaching and learning	Direct classroom involvement	<ul style="list-style-type: none"> • diverse teaching and learning provision, including 1:1 and lectures • student induction and preparation for practice learning • assessment and marking of students and student work
	Preparing for teaching	<ul style="list-style-type: none"> • induction of Experts by Experience and staff • preparing resources for teaching or producing teaching material • support for staff and student selection • taking part in advisory activity, training and mentoring relating to the development of teaching learning and assessment, planning, delivery and review
	Course design, planning and approval	<ul style="list-style-type: none"> • taking part in advisory activity relating to the development of teaching learning and assessment • designing degrees and developing new curricula, education delivery and strategies
	Ongoing evaluation	<ul style="list-style-type: none"> • observing and giving feedback to staff and students • commenting on course and module reporting • commenting on Faculty involvement activity
Research in health and social care	Research bids	<ul style="list-style-type: none"> • suggesting areas of appropriate study and helping to define the focus for research • co-authoring bid documentation • presenting research ideas to interested parties, including funders

	Undertaking research	<ul style="list-style-type: none"> • taking part in data collection and analysis, both as participants and co-researchers • taking part in a research support and advisory group to support and guide each step of the research process • mentoring, recruiting and inducting researchers
	Proposal planning, design and approval	<ul style="list-style-type: none"> • taking part in the development of research ideas into research plans • presenting research plans to interested parties and stakeholders • co-authoring proposals
	Ethical considerations and review of proposal impact	<ul style="list-style-type: none"> • evaluating and selecting research bids and proposals as part of a Faculty research committee • taking part in the Faculty ethics review panel
	Evaluation and review of research processes	<ul style="list-style-type: none"> • evaluating research results • commenting on research processes undertaken by the Faculty
	Disseminating research findings	<ul style="list-style-type: none"> • taking part in conferences and sharing results events • co-authoring papers, presentations or any other information emerging from research
Organisational development	Staff development in Expert by Experience engagement	<ul style="list-style-type: none"> • staff induction and mentoring • delivering staff development sessions and taking part in learning and teaching conferences

	Fitness to practice strategy and operational group	<ul style="list-style-type: none"> • support Faculty disciplinary processes through participation in fitness to practice hearings • assist in the development of the Fitness to Practice Strategy Group
	Commissioning	<ul style="list-style-type: none"> • taking part in discussions to decide on course purchasing and Faculty tendering events
Quality assurance and governance	Periodic review	<ul style="list-style-type: none"> • quality assurance activities and contribution to the review and performance management of existing education delivery and organisational working • taking part in course re approval events
	Strategy and policy development for staff, learner and public engagement	<ul style="list-style-type: none"> • develop the scope and remit of engagement activity through participation in Faculty leadership and management committees • develop the planning and support for engagement activity through participation in Faculty leadership and management committees • sitting on and/or holding a leadership position in the leadership and management committees
	Ensuring principles of continuing improvement	<ul style="list-style-type: none"> • ensuring organisational governance • measuring the change that happens from a range of perspectives • demonstrating the outcomes based impact of the work, showing the social and financial returns on investment

Table 2. How and where involvement could happen in the Faculty of Health and Wellbeing

4.2 Moving forwards

Faculty commitments to supporting Expert by Experience involvement. To support this work the Faculty will:

- induct experts into Faculty working;
- offer access to information on teaching and educational practices that experts are involved in;
- provide known people who take responsibility for organising and supporting experts' work, support, reward and recognition;
- recognise its responsibility under the Data Protection Act 1998 to ensure that the individual's rights regarding the use of personal data are protected;
- undertake its responsibility to provide people with support and training wherever practicable to enable effective involvement;
- offer people who are in receipt of state benefits support where appropriate, so that they make an informed decision about involvement before committing to activity with Sheffield Hallam University and considering particularly under what terms they will be involved, paid or voluntary;
- facilitate experts to contribute to meetings and education delivery, whilst having their own needs taken into account - this will include practical help (e.g. expenses or other payment: the timing and placement of meetings, etc.) and support (e.g. help to deal with jargon and stress);
- facilitate University systems and structures to support and welcome experts by experience, from the start to finish of their journey with SHU;
- engage with service user and carer focussed groups and organisations where necessary and possible.

4.3 Key considerations for getting started

This section outlines some questions that may be helpful to consider and discuss **together** at the start of involvement:

4.3.1 Experts by Experience need to consider:

- What is being asked of me and what sort of things will I do?
- How does what is being asked of me relate to my skills, interests and hopes?
- How much time will I need to commit?
- Will I need to travel?
- Is what is being asked of me clear and understandable?
- How much can I choose or alter my involvement?
- Will I need training?
- Will I be on my own or be supported?
- Will I get feedback on my involvement?
- Will I need any help (support worker, carer or interpreter)?
- How can I still be involved even if I cannot get to meetings or groups?
- How will I find out what my impact has been?
- Will I be reimbursed or paid?

4.3.2 Faculty staff need to consider they:

Ensure meaningful involvement

- Are you clear about the nature, role and purpose of involving the Expert by Experience?
- Are you prepared to be open and negotiate how you are going to work with the Expert(s) by Experience? For example when considering, individual circumstances (travel requirements, family commitments, health needs) and choices in regard to time, payment and ways of working?
- Have you considered the power imbalances implicit in this contact?

Identify experts by experience

- How are you going to find the right person for the work?
- Will it be an Expert by Experience already known to the Faculty, or someone new? Or will it involve linking and working with people from a community or network, such as a community out reach group?

Plan for involvement

- Have you considered the stage in any process that the Expert by Experience is invited to participate in?
- How have you helped the Expert by Experience understand the context of the teaching or involvement?
- Have you found the most cost effective (i.e. not the cheapest) way to involve people? Will you be engaging with groups or individuals?
- Is there an organisation that can help them work with you? What role will this organisation take?
- Have you offered them written and agreed protocols specifying the arrangements for supporting them in their involvement?
- Have you agreed reward and recognition processes? Do you know how to achieve those using Faculty processes?
- If the Expert by Experience does not wish or is unable to receive payment, have you considered other forms of payment including access to educational provision or payment in kind (for example sweat shirts)?
- Have you allowed enough time for tasks to be thought about and completed?
- When planning for engagement is everyone that needs to be, aware? That is; managers, budget holders, administrators and the wider teaching team?
- How will you offer the support that might be required for experts by experience and for students?
- How will you prepare and debrief experts by experience and students?

Generate practical arrangements to support involvement

- Have you checked the individual requirements for each person and made sure they are in place? You need to be a good host, ensuring a diverse range of facilities, for example privacy for medication, refreshments and of what kind (conforming to dietary requirements)
- Have you facilitated travel? Booking parking permits, taxis, check your car insurance before offering lifts.
- Have you made reasonable adjustment to ensure the setting and discussion is accessible?
- Have groups or meetings been conducted so that everyone is clear and well informed about what is going on?
- Have you discussed how to recognise and reward people? For example, payment for Expert by Experience time, expertise, travel.
- Have you built in time for support and debriefing?
- How will all involved on the day communicate? That is reception, other members of staff, experts by experience, particularly in case of difficulties?
- Is any pre reading etc. necessary for a meeting? Ensure it is sent out in plenty of time. Remembering to not table and then discuss items in the same meeting, giving people time to read and think about.

Follow up

- Have you thought about the support students might need post the teaching event?
- How will you support Experts by Experience afterwards? How will you hear their feedback?
- How will you feedback to the Expert by Experience on the impact of their involvement?
- Have you considered how you might share this experience with other colleagues?

Table 3. Considerations (adapted from Principles for Practice (2005) Trent NHS Strategic Health Authority and Working with service users and carers, The Open Faculty (2010)

Part B: REWARD AND RECOGNITION PRINCIPLES AND PRACTICE

This section aims to outline what core values SHU has that underpin the involvement and the recognition of experts. We seek to provide clarity and flexibility to support the payment, reward and recognition of experts by experience, according to individual context and need.

The principles of reward and recognition are:

Ensuring participants will not be out of pocket or put at risk of being financially worse off as a result of involvement with Sheffield Hallam University;

Ensuring that reasonable expenses are covered;

Enabling an informed choice about involvement rates and terms before committing to involvement;

Offering reward, recognition and reimbursements in a manner that will not exclude people who must comply with state benefit conditions;

Offering flexibility, choice and creativity in reward, that takes account of individual needs on how and when they are involved

Table 4: The principles of reward and recognition

1. Shared responsibilities for reward and recognition

This section outlines the responsibilities and accountabilities for the Faculty and the Expert by Experience.

1.1 The Faculty and staff members need to commit to:

- offer involvement in a manner that does not present unnecessary benefit barriers as agreed with the individual: this may be voluntary, or paid at a rate lower than

the standard rate offered, mindful that reimbursements may be treated as earnings;¹

- offer reward and recognition according to open and consistent criteria that takes account of the level of involvement, the expertise required and their personal situation;
- offer supportive material (such as letters outlining involvement) to necessary third parties;
- The University will vary offers of involvement so that reward, recognition and remuneration are acceptable to people on benefits provided that the service users can establish the amount that they can receive for the work that they perform. People may choose:
 - to direct their payment to a representative organisation;
 - to have their travel pre-booked by Sheffield Hallam Faculty;
 - to have child carer or replacement carer paid directly if needed,
 - to select an alternative reward where possible, such as education or access to information.
- help the Experts by Experience engage with items in 1.2

1.2 The Experts by Experience will need to:

- notify Jobcentre Plus, as required, of plans for voluntary or paid involvement and the amount of payments, if they are in receipt of state benefits;
- notify HM Revenue and Customs of payments received where this is required
- choose the most cost effective, appropriate travel available to them

2. Monitoring, evaluation and review

We recognise that due to the variety of contributions from a wide range of contributors that a 'one size fits all' approach is not likely to be satisfactory. We need to keep this in mind when considering what we offer by way of remuneration. The system of monitoring and evaluation therefore needs to be sensitive to both the

¹ SHU acknowledges the benefit barriers to involvement that may be presented by complex benefit rules and conditions. There are resources available for support at Sheffield Hallam University.

individuals concerned and to their circumstances as well as integrate with existing Human Resource protocols.

We suggest that monitoring and evaluation should begin *before* the session/intervention/contribution that the Expert by Experience is engaged with so that all parties are aware of what processes of payment/reward are available and/or desirable. And this may include a 'no payment required' option.

2.1 Guidelines for good practice around monitoring, evaluation and review

Good practice relating to monitoring, evaluation and review includes:

- Approximately one week after the session, or at a time judged appropriate to capture the necessary information, the expert should be contacted (again by a previously agreed medium) to establish whether their payment/reward has been received and if it is correct;
- For individuals who are likely to make regular contributions we suggest that a quarterly/half yearly/annual feedback form could be used to register satisfaction with the processes and to encourage some exchange of ideas on what works, or not;
- Regular contributors should also be invited to formal meetings to express their views on the process;
- For individuals who may make one-off contributions a standard template should be devised to invite their comments on all aspects of the process;
- All individuals who contribute their time and experience should be encouraged to suggest others in similar positions who might be interested in working with us.
- All individuals should be 'buddied' with a member of staff who would act as first response to any concerns.

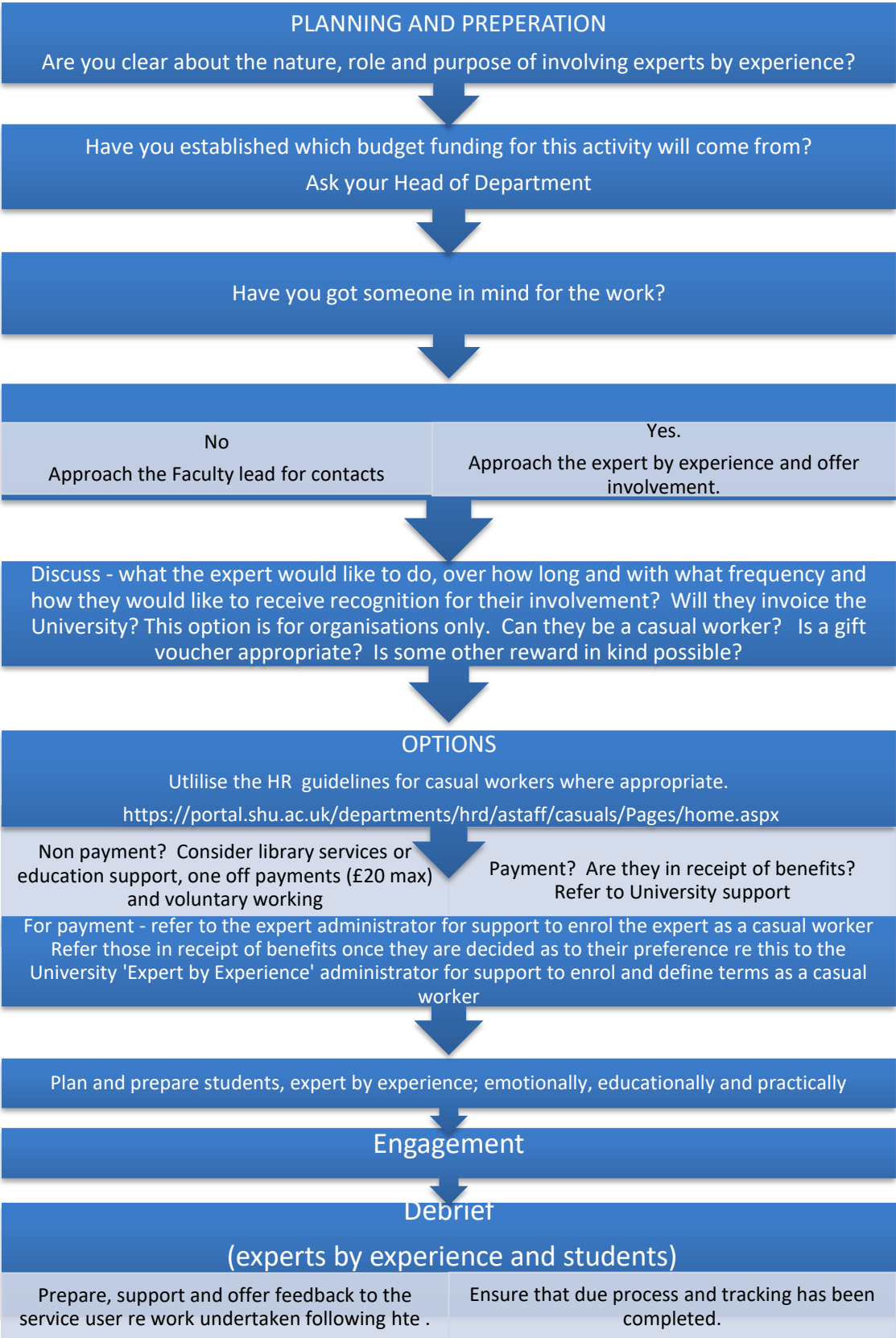
The aim is to establish a Faculty 'forum' as a reporting mechanism. Here monitoring and annual reviews of the effectiveness and impact of this document (both framework and guidance) will be undertaken. Any measures adopted need to reflect or demonstrate the impact of Expert by Experience involvement with respect to social and financial values.

We remember that:

The true test of our commitment is that involvement will become the way we do things and engagement becomes ever more integrated into our work;

The end result is not the involvement of people (staff, learners and the public) but what comes from it.

3. Putting the reward and recognition principles into practice - a quick step guide to reward and remuneration



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NMC (2009): Standards for pre-registration midwifery education

NMC (2010): Standards for pre-registration nursing education

Legislation:

2009 no. 2655 The social security (miscellaneous amendments) (no. 4) regulations 2009.

2009 no. 2678 The social security benefit (computation of earnings) (amendment) regulations 2009.

2009 no. 2608 The housing benefit and council tax benefit (miscellaneous amendments) regulations 2009.

Guidance and Resources:

Housing Benefit and Council Tax Benefit circular

HB/CTB A24/2009. Guidance on the permitted work earnings disregards in HB/CTB.

Equality impact assessment changes to the way DWP deal with payments to 'service users' published by Benefit Reform Division, Welfare and Wellbeing Group.

Decision makers' guide: chapters 15, 28, and 85:

www.dwp.gov.uk/publications/specialist-guides/decision-makers-guide

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The Health Foundation (February 2012) *MAGIC: Making Good Decisions in Collaboration*

Williams, S. and Gilbert, D. (2011) *An Economic Case for Involvement*

Appendix 1. The Policy and Professional Framework for Service User and Carer Involvement

1.1 United Kingdom Health Policy

Service user and carer involvement in the education of health and social care professionals has become expected practice. Department of Health policy (DoH) (2005, 2007a, 2008) is driving a patient-led culture and this requires the workforce to develop the appropriate communication and negotiation skills, and different ways of working (Hawley, 2005).

1.2 Professional Drivers

The Health Care Professions Council (HCPC) have developed a new standard of education and training about service user and carer involvement in education and training programmes and the NMC standards for pre-registration midwifery (NMC, 2009) and nursing education (NMC, 2010) include a requirement for programme providers to demonstrate how service users contribute to the design and delivery of education programmes

1.3 Health Care Education Commissioners

The Health and Social Care Act 2012 requires Clinical Commissioning Groups/ Health Education England / Local Education and Training Boards

(CCGs) and commissioners in NHS England to enable:

- patients and carers to participate in planning, managing and making decisions about their care and treatment, through the services they commission;
- the effective participation of the public in the commissioning process itself, so that services provided reflect the needs of local people. This includes education.

1.4 National Coordinating Centre for Public Engagement

In addition the National Co-ordinating Centre for Public Engagement, shows how involving the public impacts positively on Higher Education Institutions.

<http://www.publicengagement.ac.uk/>.

1.5 Disability Discrimination Act

In the 1995 Disability Discrimination Act² after section 49 there is an insertion that requires every public authority, which includes the Faculty, to have due regard to -

- (a) the need to eliminate discrimination that is unlawful under this Act;
- (b) the need to eliminate harassment of disabled persons that is related to their disabilities;
- (c) the need to promote equality of opportunity between disabled persons and other persons;
- (d) the need to take steps to take account of disabled persons' disabilities, even where that involves treating disabled persons more favourably than other persons;
- (e) the need to promote positive attitudes towards disabled persons; and
- (f) the need to encourage participation by disabled persons in public life.

² <http://www.legislation.gov.uk/ukpga/1995/50/contents>

Appendix 2 General Principles of payment for those in receipt of benefits

developed by Maurice Hammerton

The regulations are complex and, at times, contradict each other, but these general rules have been distilled from the DWP advice, whilst noting that they too are often confused by these issues. There are rules allowing anyone on Employment and Support Allowance (ESA) to do 'Permitted Work'. This means that anyone can earn up to £20 indefinitely or can work up to 16 hours and earn up to a certain level for a limited period of time without it affecting their benefit entitlement. The amount they can earn is currently £101 per week (net of tax and NI) but this amount changes in October each year with the changes to the National Minimum Wage. The local Job Centre Plus office has directed SHU to engage with these normal Permitted Work rules for people claiming ESA.

The regulations indicate that:

1. Any expenses paid to a person participating as a service user are disregarded in the DWP benefit calculation.
2. Payments in kind should be declared, but most should not be counted as income. This means that a gift of a sweatshirt will probably not be counted, but a gift of a non cash voucher would be treated as income. Lunch can be covered as a reasonable expense, but should be reimbursed on production of a receipt. The reimbursement should be for the cost of the meal with no profit element for the person receiving the meal.
3. Normal notional income rules do not apply to a person participating as an expert by experience. This means that the person can choose to be paid at a lower rate or to volunteer their services for free without the DWP saying they have deprived themselves of this income and so counting it as though the person has actually received it.

This advice remains to be 'tested' and should be viewed with caution and in line with the advice available via the Participation and Involvement Helpline.