

Our Ref: NG/RM/24440 Date: 6<sup>th</sup> January 2025

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Reception: 0300 123 1535

Dear

#### **Freedom of Information Act Request**

I am writing in response to your e-mail of the 16<sup>th</sup> December 2024. Your request has been processed using the Trust's procedures for the disclosure of information under the Freedom of Information Act (2000).

#### Requested information:

We are interested in the role of peer support workers within your organisation. A peer support worker is someone who has obtained their role (paid or voluntary) through having lived experience of mental health services.

- 1. How many peer support workers are employed within acute inpatient mental health settings. None as yet but we have approval for 4 x band 4 peers and 1 x band 5 for inpatient areas.
- 2. Are the posts voluntary or paid and if paid at what banding? The Trust have paid peers within the organisation at bands 2, 3, 4, & 5 that all have a job description. Other roles we have are detailed in the Trust coproduction, involvement and volunteer policy. Please see Appendix 1 attached.
- Are there any vacant peer support worker posts in these settings and if so how many?No
- 4. What strategies and policy documents do you have in place in relation to supporting peer support workers in their roles? Coproduction, Involvement and Volunteers Policy, Job descriptions for Paid peer roles and we have a 3 year plan coproduction and involvement plan that discusses how we wish to progress coproduction and paid/unpaid roles peer roles over the next 3 years.

If you are dissatisfied with the handling of your request, you have the right to ask for an internal review of the management of your request. Internal review requests should be submitted within two months of the date of receipt of the response to your original letter and should be addressed to: Dr Buki Adeyemo, Chief Executive, North Staffordshire Combined Healthcare Trust, Trust Headquarters, Lawton House, Bellringer Road, Trentham, ST4 8HH. If you are not content with the outcome of the internal review, you have the right to apply directly to the Information Commissioner for a decision.







The Information Commissioner can be contacted at: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.

Yours sincerely

**Nicola Griffiths** 

**Deputy Director of Governance** 









**Document level:** Trust **Code:** 4.20\_

Issue number: 04

## **Coproduction, Involvement and Volunteers Policy**

Lead executive	Chief Nurse
Authors details	Coproduction, Involvement and Volunteers Team

Type of document	Policy & Standard operating Procedure
Target audience	All staff and volunteers
Document purpose	This policy sets out the standards that are expected for coproduction, involvement representatives and volunteers within the Trust

Approving meeting	Quality Committee	Meeting date	5 <sup>th</sup> September 2024
Implementation date	5 <sup>th</sup> September 2024	Review date	30 <sup>th</sup> September 2027

Trust documents to be read in conjunction with			
	NHS Standing Financial Instructions		

Document change history		Version	Date
What is different?	Volunteer car drivers removed. Change title to reflect all volunteer opportunities. Add descriptors for roles	Version 1	2011
	Full review of Policy to incorporate Involvement and Coproduction to make more inclusive. Aligns to NHS Long Term Plan	Version 2	2023
	Sop included to prevent duplication and having to source another document	Version 2	2023
Appendices / electronic forms	All appendices	Version 3	Dec 2023
What is the impact of change?			

Training requirements There are no specific training requirements for this document.	
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Document consultation		
Directorates	Nursing and Quality Policy Working Group	
Corporate services	Service User and Carer Council	
External agencies		

Financial resource	
implications	

Sustainability	<ol> <li>Reduce the environmental impact of health and social care in Staffordshire and Stoke on Trent</li> <li>Build a network of climate and sustainability champions across Staffordshire and Stoke on Trent</li> </ol>

External references					
NHS Constitution Her Majesty's Reven	ue and Customs				
Department for Work	Department for Work and Pensions				
•	Involvement for Impact Strategic Framework General Data Protection Act				
NSCHT Privacy State	ement Combined Healthcare Trust Strategy				
	Health and Care Research				
	Health and Care Research – Payment guidance for members of the volvement in research				
Care Quality commis					
Monitoring					
compliance with					
the processes outlined within this					

document

3. Share learning and best practice  $\ \square$ 

Ec	quality Impact Assessment (EIA) - Initial assessment	Yes/No	Less favourable / More favourable / Mixed impact
Do	pes this document affect one or more group(s) less or more t)?	favorably tha	n another (see
_	<b>Age</b> (e.g. consider impact on younger people/ older people)	Yes	Less favourable
_	<b>Disability</b> (remember to consider physical, mental and sensory impairments)	No	
_	<b>Sex/Gender</b> (any particular M/F gender impact; also consider impact on those responsible for childcare)	No	
_	<b>Gender identity and gender reassignment</b> (i.e. impact on people who identify as trans, non-binary or gender fluid)	No	
_	Race / ethnicity / ethnic communities / cultural groups (include those with foreign language needs, including European countries, Roma/travelling communities)	No	
_	Pregnancy and maternity, including adoption (i.e. impact during pregnancy and the 12 months after; including for both heterosexual and same sex couples)	No	
_	<b>Sexual Orientation</b> (impact on people who identify as lesbian, gay or bi – whether stated as 'out' or not)	No	
_	Marriage and/or Civil Partnership (including heterosexual and same sex marriage)	No	
_	Religion and/or Belief (includes those with religion and /or belief and those with none)		
_	Other equality groups? (may include groups like those living in poverty, sex workers, asylum seekers, people with substance misuse issues, prison and (ex) offending population, Roma/travelling communities, and any other groups who may be disadvantaged in some way, who	No	

may or may not be part of the groups above equality					
groups)					
	If you answered yes to any of the above, please provide details below, including evidence				
supporting differential experience or impact.					
All registered volunteers in clinical areas should be over 18 years.	ears old.				
If you have identified potential negative impact:					
- Can this impact be avoided?					
- What alternatives are there to achieving the document with	nout the impa	ct?			
Can the impact be reduced by taking different action?					
Enter details here if applicable					
Do any differences identified above amount to discrimination and the potential for adverse impact in this policy?	Yes / <mark>No</mark>				
If YES could it still be justifiable e.g. on grounds of					
promoting equality of opportunity for one group? Or any	Yes / No				
other reason					
Enter details here if applicable					
	Does this document affect one or more group(s) less or more favorably than another (see				
list)?	•	,			
Where an adverse, negative or potentially discriminatory impa	ct on one or	more equality			
groups has been identified above, a full EIA should be underta	aken. Please	refer this to the			
Diversity and Inclusion Lead, together with any suggestions as	s to the action	n required to			
avoid or reduce this impact.					
For advice in relation to any aspect of completing the EIA asset	essment, plea	ase contact the			
Diversity and Inclusion Lead at <a href="mailto:Diversity@northstaffs.nhs.uk">Diversity@northstaffs.nhs.uk</a>					
Was a full impact assessment required?	Yes / No				
What is the level of impact?	Low / mediu	m / high			
Training Needs Analysis for the policy for the development and management of					
Trustwide procedural / approved documents					
Please tick as appropriate					
i case tiek as appropriate					

There is no specific training requirements- awareness for relevant staff required,	
disseminated via appropriate channels	<b>✓</b>
(Do not continue to complete this form-no formal training needs analysis required)	
There is specific training requirements for staff groups	
(Please complete the remainder of the form-formal training needs analysis required-	
link with learning and development department.	

Staff Group	√ if appropriate	Frequenc y	Suggested Delivery Method (traditional/ face to face / e-learning/handout)	Is this included in Trustwide learning programme for this staff group (✓ if yes)
Career Grade Doctor				
Training Grade Doctor				
Locum medical staff				
Inpatient Registered Nurse				
Inpatient Non- registered Nurse				
Community Registered Nurse				

Community Non Registered						
Nurse / Care Assistant						
Psychologist / Pharmacist						
Therapist						
Clinical bank staff regular worker						
Clinical bank staff infrequent worker						
Non-clinical patient contact						
Non-clinical non patient contact						
Please give any a applicable) n/a	additional inforr	mation impact	ing on identified	d staff gro	up training needs (if	
				ment outl	ined within the policy	
i.e. National Conf	idential Inquiry	/NICE guidan	ce etc.			
Any other addition	nal information					
n/a						
	1. 0:				244 11 2224	
Completed by	Jayne Simne	er			Date   July 2024	

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#### 1.0 Introduction and Background

The Volunteers and involvement policy sets out the principles by which the Trust will implement Involvement and Volunteer services using a coproduction model.

The Trust strives to develop a population of voluntary and involvement roles which mirrors the diversity of the community in which it operates. This diversity will allow the Trust to recognise and serve the needs of those communities better and positive action will be taken to achieve this. We actively encourage people from under-represented and seldom heard groups to seek voluntary and involvement roles within the Trust and recognise that volunteering and being involved is often an important route into paid employment.

Therefore, the Trust encourages the involvement of volunteers and involvement at all levels in the organisation and within all appropriate programmes and activities. Volunteers and involvement are an extremely important and valuable resource to the Trust. Volunteers and involvement enables services to be responsive to the people using those services, their families and carers and provides the opportunity for the Trust to learn from their experience. Every service should listen and respond to the people who use their services, their families/friends and carers as part of good practice, to improve services and sustain change. Our key priorities are to achieve quality, safety and positive experiences by developing genuine partnerships with people who use our services, their families and carers (NHS, 2019). Equally, it enables each individual to feel valued, a sense of empowerment, improve their self-confidence, self-esteem and self-worth and to take positive steps towards their own wellbeing.

## 2.0 Policy synopsis

This policy applies to all areas within the North Staffordshire Combined Healthcare NHS Trust (NSCHT) and provides guidance and information for staff, volunteers and those involved with an overview of the Trusts processes of involving people from our communities in our portfolio of services across Staffordshire and Stoke on Trent. The Trust provides mental health and learning disabilities services for adults and children and many specialised services. The policy provides guidance to the managers, employees, volunteers and people in involvement roles.

#### 3.0 Content of Policy

NSCHT clinical teams support people experiencing various mental health, learning disabilities and substance misuse issues. The Trust is committed to embedding co-production and involvement from all these roles into teams.

People who use our services and their families/carers tell us that they would welcome support from someone who has experience of what they are going through in order to help them in their recovery journey. These roles can be as part of clinical teams but also as volunteers or involvement roles please refer to definitions below. This policy and attached Standard operating procedures will ensure that we recruit, retain and pay for involvement where appropriate, to follow our ambition to have all services are working in a co-design and coproduction model.

### 4.0 Definitions, duties and responsibilities

All involvement roles (Involvement, Coproduction, Volunteers) shall be extended the right to be given meaningful opportunities and clinical teams to work alongside, the right to be treated as equal co-workers, the right to supervision, the right to full involvement and participation, and the right to appraisal for work done. There is an expectation that Trust behaviours and values will be followed at all times.

## 4.1 Co-production

Co-production is when service users, families and carers influence the support received, or how services are designed and delivered. The Trust aspires to be outstanding as a diverse and inclusive organisation and aims to be representative of the people and communities that we serve. Involvement is at the centre of co-production; both have the same aims in mind; to enable people to work in partnership to achieve common goals. Both can help people to become actively involved in their own care, in their communities, in service delivery and evaluation and in organisational governance and strategy.

#### 4.2 Volunteer

A volunteer is anyone who, without compensation or expectation beyond reimbursement of expenses incurred in the course of their volunteer duties, performs a task at the direction of and on behalf of the Trust. A volunteer can be anyone who has current or previously had lived experience of any health difficulties.

The tasks undertaken by volunteers will always be complementary rather than supplementary to those of paid employees and will normally be tasks associated with enhancing recreational and social opportunities for people who use our services or for those who care for people who use our services. Volunteers will never be used to fill the gap created by a vacant or temporary post.

#### 4.3 Volunteer Peer Mentor Role

A volunteer peer mentor is someone who has lived experience; either personally or as a carer and who can use these experiences to help others

on their recovery journey. The role requires a willingness to share personal lived experience to support others in their recovery journey.

Volunteer Peer Mentors, role model that recovery is possible; this is central to sustaining and nurturing hope which is a key ingredient of recovery. Volunteer Peer Mentors are able to share coping strategies and ideas about how to improve and maintain wellbeing, supporting service users and carers to develop greater ownership and empowerment for those on their recovery journey.

#### 4.4 Service Users

People who are currently accessing services or people who have recent and relevant experience in accessing our services.

We are committed to gaining service user feedback that can inform their current care provision and future care and/or service provision for them or others who use our services.

#### 4.5 Carers

People who informally or formally care for others on a regular basis i.e. child, young person, parent, partner, friend or neighbour in the context of the people we serve. Carers/friends are significant in a person's life but might not see themselves in a caring role.

We are committed to gaining carer/friends feedback that can inform their current care provision and future care and/or service provision for them or others who use our services

#### 4.6 The service user and carer council (Involvement role)

The Trust has a service user and carer council (SUCC) in place to ensure that people who access our services and people who care for them, are provided with a regular opportunity to be involved and discuss Trust activity, influencing and providing feedback on our care provisions and future service developments.

#### 4.7 Patient Safety Partners

Patient safety partners have lived experience of mental distress or learning disabilities and they work alongside our patient and organisational safety team.

The role requires a willingness to share personal lived experience to support others in their recovery journey and advocate on behalf of people who use services and their friends or families.

#### 4.8 Involvement Roles

This is a flexible role that requires the person to support the Trust to improve services or practices across our geographical area.

The role supports the Trust to have involvement to help improve services or practices. They can be consultation, collaboration or you may be asked if you would like to be involved in the coproduction of a solution or change in services.

#### 4.9 Wellbeing college co-producers

Any person from the above roles could be a wellbeing college co-producer. College co-producers are involved in the whole process from idea to course content completion working alongside topic experts.

## 4.10 Wellbeing College workshop facilitator

Any person from the above roles could be a wellbeing college facilitator.

College facilitators would work alongside topic experts to co-facilitate workshops delivered on our college prospectus.

#### 4.11 Recovery and Experience Lead

The Recovery and Experience Lead will supervise the Volunteer Coordinator and ensure volunteer involvement opportunities are included and considered across the strategies and delivery of all Trust services.

#### 4.12 Volunteer Coordinator

Individual Volunteers will be supported by the Volunteer Coordinator who will work throughout the Trust to plan, develop and manage a unified and consistent process for the involvement of volunteers. The Volunteer Service Coordinator will take the lead in assisting all departments of the Trust in developing involvement and coproduction opportunities and supporting both Trust services and volunteers to make this a dynamic relationship where lived experience is valued and used to improve the offer to our Service Users and carers. The Volunteer Service Coordinator will be involved in all Trusts decisions that are likely to affect volunteers and the volunteer programme.

The Volunteer Services Coordinator will ensure that all parties are aware of their responsibilities regarding supervision. The volunteer coordinator will maintain a database of the volunteers.

**4.13 Coproduction Team** (comprising of the Recovery and Experience Lead, Volunteer Coordinator, Patient Experience team lead, Community Engagement Coordinator, Wellbeing College Coordinator and Senior Peer support worker)

The relevant coordinator from the coproduction team linked to the volunteer role will:

- Ensure that volunteers are aware of what is expected of them in the volunteering role
- Inform volunteers of developments in volunteering opportunities
- Seek volunteer feedback on their experiences
- · Identify opportunities for volunteer stories/articles
- Promote the role and benefits of volunteering within the Trust particularly aiming to recruit former service users
- Ensure that all relevant statutory and mandatory and any other required training is undertaken for each volunteer at the appropriate time
- Ensure all relevant checks are undertaken as part of the volunteer recruitment and appointment process
- Aid in the resolution of issues and concerns raised by volunteers
- Develop a range of new volunteering projects
- Regularly review the suitability of volunteer placements

The Team will respond to requests from professionals to advertise an opportunity or invite representatives registered on the database to take part in an involvement activity. The Coproduction Team can be contacted via email <a href="mailto:coproduction@combined.nhs.uk">coproduction@combined.nhs.uk</a> for the form 'Staff Request for Involvement Representatives' to complete.

Following completion of this form, the Coproduction Team will use the details to invite representatives to take part in an activity and inform the staff member which people have responded. Where people have expressed an interest, their contact details will be given to the staff member for them to contact directly.

Use of service user or carer's information will be proportionate. The Trust will respect their rights to data protection and will use suitable and specific safeguards to protect their information. It is important for emails addressed to more than one service user or carer to be blind copied (use the Bcc field) to protect their email addresses.

#### 4.14 Chief Nursing Executive

The Chief Nursing Executive is responsible for:

- Ensuring there is an appropriate policy lead
- The policy being reviewed and updated appropriately
- · Compliance is monitored
- Volunteers and Involvement representatives are being adequately represented within the Trust

#### 4.15 Line managers

The line manager of the supervisor of the volunteer or involvement representative will ensure governance around induction and supervision arrangements.

Managers should consider co-production before making any changes, developing new ways of working, developing service user and patient or carer information, noting the impact of decisions made without coproduction can have on service users, patients and carers lives.

All service managers should be clear about how service users and carers are involved in their service, both the current service provided and any plans to change service delivery.

Line managers need to ensure the volunteer of involvement representative has an identified member of staff who will undertake supervision.

### 4.16 Employees

All staff should involve the service users and carers they have contact with in their service(s). Services that have identified the need for service user and carer involvement are asked to complete an initial registration form (Appendix 3) providing details of the activity together with the lead staff member, date and times required with an expected date of completion. Upon receipt, the Coproduction Team would triage requests and support the clinical team to identify a suitable volunteer for that project.

## 5.0 Process for Monitoring Compliance and Effectiveness

Monitoring of the implementation of this policy will be through co-production and internal audit processes.

Our registered Volunteers and Involvement Representatives are provided with an equal opportunity to be involved in as much or as little as they wish ensuring this is inclusive of all specialties within the Trust. We will provide opportunities for our diverse communities to become involved in Trust improvement initiatives by engaging with community groups and identifying under-represented communities to ensure that a diversity of service users, carers and families will be involved at all levels and all stages of an organisation or project.

### 6.0 Equality Analysis Summary

NSCHT considers how the decisions it makes affects people who share different protected characteristics (race, disability, sex, gender re-assignment, religion/belief, sexual orientation, age, marriage and civil partnership, pregnancy and maternity). The Trust recognises that there are groups/communities e.g. teenage parents or homeless people that are also recognised within society as excluded or disadvantaged in addition to those listed as protected above. This document includes these groups. The outcomes the Equality Impact Assessment identified a positive impact in that the policy supports all the protected characteristics. There was no adverse impact on any of the protected characteristics and no action is required to be to be taken unless further identified.

#### Appendix 1 – Standard operating procedure

## Standard Operating Procedure for Recruitment and Retention of volunteers and Involvement representatives

All volunteers and involvement representatives must complete the recruitment process to ensure safe and effective recruitment.

#### 1.0 Advertising and recruitment

Advertising for volunteers and involvement will be undertaken through the Trust communication channels such as news round and volunteer pages on the Trusts public facing website. In addition, advertisement in local public areas, across our partners and networks in the community and word of mouth. Directorate teams are encouraged to identify and sign-post service users and carers to volunteering opportunities.

#### 2.0 Application Process

Applications are available online at North Staffs Combined Healthcare NHS Trust website or from the Volunteer Coordinator via <a href="mailto:coproduction@combined.nhs.uk">coproduction@combined.nhs.uk</a> (either by email or hard copy).

When the application form is received, a member of the Involvement and Coproduction Team will be responsible for undertaking an initial face to face meeting to discuss the experience and strengths of any applicants and to facilitate a conversation for a suitable match for involvement, incorporating the volunteers goals for involvement. At this meeting, the identified lead will discuss the following:

- · The Trust, services and values
- Options for volunteering roles
- Relevant policies and expectations
- Expenses
- Car Insurance / Trust Employee Liability Insurance

The potential volunteer will be given the opportunity to discuss:

- The type of role they would be interested in
- What they hope to gain from volunteering
- Days, times, and frequency that they are available to volunteer
- Opportunity to identify any individual needs or reasonable adjustments required
- Any other questions

To remain supportive of people's recovery journey volunteer applications will not normally be considered from those who have had an inpatient stay until six months post discharge. Additionally volunteers will not be placed in an area where they were an inpatient until 12 months after discharge. There may be occasions when an exception can be made but this will be considered on an individual basis.

#### 3.0 Governance

Some roles require the person to complete a Disclosure and Barring Service (DBS) form, as per current DBS and Barring Rules (Gov.uk, 2022) (see Figure 1).

If the involvement activity includes unsupervised contact with people who are classified as vulnerable under current safeguarding legislation, a request will be made for information on the involvement representative through the Disclosure and Barring Scheme (DBS). This will also be recorded on the involvement database, as will any training undertaken. The volunteer will also be asked to complete a Volunteers Agreement (see appendix 6). Once DBS is received the lead person will log the DBS and commence the local induction process within the area they are placed in.

Where possible, any individual needs or reasonable adjustments, should be considered and accommodated, taking account of the individual's circumstances. The volunteer can be supported to complete a health passport if they wish to have something prepared to share with their supervisor in their place of involvement.

For each volunteer, the Trust will hold a databased of the following:

- volunteer identification
- gender
- title
- full name
- address and post code
- date of birth
- contact phone number
- email address
- own transport
- ethnicity
- employment status
- disability
- reference letters
- occupational health FIT form confirmation
- Disclosure & Barring Service confirmation check
- placement info, mandatory & statutory training
- local induction confirmation
- next of kin/contact no
- if and when appropriate record reason for leaving

This information is managed in line with General Data Protection Regulation (GDPR) (EU) 2016/679 GDPR (May 2018)

### 4.0 Registering for Involvement

People who would like to be contacted for involvement opportunities can register by completing the Involvement Registration Form (within our public website) and giving it to a member of staff or the Involvement Team. The details of the involvement representative are recorded along with their areas of interest and any particular skills or experience they may have. This is recorded on a secure database which is maintained by the Coproduction Team. The registered person will be contacted to thank them for their interest and an explanation will be provided as to what to expect when taking part in activities.

If the potential volunteer is not felt to be ready or suitable for a specific role they will be given constructive feedback by the lead person. Any issues regarding the suitability of a volunteer involvement placement will be discussed with the Involvement Team Lead.

#### 4.1 Flow Chart for how a Service user/ carer gets involved

 People who would like to be cont Registration Form (within our pull)

 People who would like to be contacted for involvement opportunities can register by completing the Involvement Registration Form (within our public website) and giving it to a member of staff or the Involvement Team.

Step 2

• The details of the involvement representative are recorded along with their areas of interest and any particular skills or experience they may have. This is recorded on a secure database which is maintained by the Coproduction Team.

Step 3

• The registered person will be contacted to thank them for their interest and an explanation will be provided as to what to expect when taking part in activities.

Step 4

• If the involvement activity includes regular contact with people who are classified as vulnerable under current safeguarding legislation, a request will be made for a information through the disclosure and Barring Scheme (DBS). This will also be recorded on the involvement databse, as will any trinaing undertaken.

Step 5

 Meet other service users and carers. Learn first hand about their experience of involvement and the difference involvement can make. Attend informal training sessions in preparation.

4.2 Flow chart/ quick guide: Procedure for Recruitment and Retention of

vol	unteers and Inv	olvement repre	sentatives				
	Initiation Welcome Training offer Registration		Training one		Training offer		Ongoing Support
	A person	Asset based	Lead	Undertake	At 6 weeks:		
	expresses an	conversation	member of	the triage –	reviews		
	interest via	with the	staff	Log	individual's		
	website/pos	Involvement	organises	individual's	involvement		
	tcard/ e-	and	registration,	details on	and current		
	mail/in	coproduction	induction	database	position		
	person	team	and training	and signpost	within the		
				to relevant	Trust and on		
			15	member of	going		
				staff	support		

# 5.0 Training, preparation and support for Volunteers and Involvement Representatives

All volunteers and involvement representatives will be supported, prepared and required to undertake some training. These include:

- Representatives are offered introductory courses for involvement via the Wellbeing College which give an overview of what involvement means for the Trust and the areas people can contribute to
- Volunteers and people who get involved can expect to be allocated a lead supervisor to support, sign post to others in the organisation and offer guidance and information.
- Specific training relevant to the requirements of the activity, e.g, if someone
  is going to be taking part in interviewing staff, they will be offered training in
  recruitment and selection
- Trust training statutory, mandatory and clinically required depending on role
- Flexibility will be built in to enable people to take advantage of different opportunities and to move in and out of involvement when they wish to or need to
- Staff providing involvement opportunities within their services must arrange support for representatives so they can fully contribute
- Consideration for reasonable adjustments
- Where digital technology is used for meetings or workshops etc. then service user guidance and support videos must be offered to support the individual
- Supervision in the form of 1:1, group or coaching conversations will be offered to maintain wellbeing and support development
- Additional support and/or supervision may be required by some individuals and this should be accommodated as part of any reasonable adjustments according to the individual's needs and can be documented in a health passport if required.

Any additional learning opportunities will be discussed with your supervisor in the area that you are involved with.

Figure 1: Guidance on DBS, OH and Training

Role	DBS	ОН	Statutory and Mandatory Training
Involvement representatives	No	No	No
Volunteer in clinical area	Yes	Yes	Yes
Peer mentor	Yes	Yes	Yes
Patient safety partner	Yes	Yes	Yes
Service User carer council	No	No	No

#### 6.0 Financial Support for Involvement Payment

Volunteers and involvement representatives taking part in involvement activities are entitled to reimbursement of travel expenses and some activities may attract an involvement fee. The Trust advocates that volunteers and involvement representatives should not be financially out of pocket.

One involvement role could be supporting our research and development team. Being involved in research is not the same as taking part in research for a trial or study. It's about being a member of the research team that works together to design and run the study.

Where involvement has taken place in research, reimbursement is paid at an elevated level. The National Institute for Health and Care Research (NIHR) Centre for Engagement and Dissemination's payment policy sets out the rates for honorarium payments, which can be used as a guide / benchmark. Payment guidance for researchers and professionals | NIHR.

There are many different types of involvement and people will be offered payment for expenses and hourly rate. Please refer to SOP for Financial Reimbursement.

#### 6.1 Refusal of Financial Reimbursement

The volunteer or involvement representative may decline this offer of payment and give their time in a voluntary unpaid basis for which out of pocket expenses may be reimbursed. We cannot negotiate payment, involvement can be either be on a paid or voluntary basis.

#### Appendix 2 – Standard operating procedure

### Standard Operating Procedure for Financial Reimbursement

#### 1.0 Introduction

This Standard Operating Procedure (SOP) outlines the standards and processes for financial reimbursement for volunteers and involvement representatives within the services provided by North Staffordshire Combined Healthcare Trust.

It should be made clear before an activity whether the Volunteer or involvement representative will be eligible to claim payment. It is the decision of the service conducting the involvement whether it is appropriate to offer payment as guided below. In general, attending meetings, forums and events will not attract payment. Working in partnership with staff on a specific project or presenting at an event are examples of activities for which services could offer payment.

Being involved in research is not the same as taking part in research for a trial or study. It's about being a member of the research team that works together to design and run the study. Where involvement has taken place in research, reimbursement is paid at an elevated level. The National Institute for Health and Care Research (NIHR) Centre for Engagement and Dissemination's payment policy sets out the rates for honorarium payments, which can be used as a guide / benchmark. Payment guidance for researchers and professionals | NIHR.

Please note: reimbursement must be agreed prior to any engagement with the Research and Development Team.

#### 2.0 Financial reimbursement

The rate at which involvement representatives are paid for their involvement contribution depends solely upon the type of activity they are undertaking. A sessional rate will be applied in most cases of £7.00 per hour.

Payment will always be made via Banking Automated Clearing Services (BACS), however in rare occasions when involving children and young people high street vouchers or a cheque can be offered. This must be clearly identified on the claim form.

#### 2.1 Reimbursement for Travel Expenses

Where volunteers and involvement representatives working in partnership with NSCHT attend a pre-agreed specified involvement activity or meeting, they will be able to claim reimbursement of travel expenses. Expenses for

travelling by car is paid at the public transport rate of 45 pence per mile. It is the responsibility of the involvement representative to inform their motor insurance company if they are using their car in the act of involvement.

Reimbursement of private mileage will be paid in line with HM Revenue & Customs rates and allowances and will be paid to the exact amount from a declared home address to involvement activity. Expenses other than mileage allowance will be reimbursed against production of receipts for example: bus tickets. These payments cannot be classed as income by either HMRC or DWP.

#### 2.2 Refusal of Financial Reimbursement

The volunteers and involvement representatives may decline this offer of payment if they wish and give of their time in a voluntary unpaid capacity for which out of pocket expenses may be reimbursed. We cannot negotiate payment to fit into payment categories within the benefit system. Involvement can be either paid or voluntary.

#### 3.0 How to make payment

Volunteers and involvement representatives will be required to claim expenses by means of submitting an Involvement Claim Form (Appendix 8).

**Step 1:** Identify a budget from which you will be making the payment. For Trust wide initiatives and projects advice should be sought from the Involvement Team.

Please note: there is no central budget for involvement and therefore payment is taken from operational service budgets. As a minimum requirement, reimbursement of travel expenses must be offered.

### **Step 2:** There are two preferred methods of payment:

- BACS (Banking Automated Clearing Services) can be made directly into your bank account. In order for a payment by BACS, the volunteer and involvement representatives will need to complete an authorisation form for BACS (Appendix 7) and have this countersigned by the staff member.
- 2. A cheque can be raised through the Finance Department. If a cheque is requested you will need to ensure that the payee has a bank/building society or post office account to pay the cheque into.
  - **Step 3:** A claim form should be submitted to the Finance Department with each attendance recorded separately. You will need to ensure that the name and address is correct and legibly filled in so that the Finance Department can arrange to issue the cheque or postal order. People may register their bank

account details with the Trust for direct payment if they will be involved in specific projects which may incur more than one expense payment.

#### 3.1 Arrangements for people without bank accounts

Postal orders or high street vouchers can be raised through the Finance Department, these are especially ideal for young people who are involved with us and do not have bank accounts, equally high street vouchers can be made available for anyone who does not have a bank account.

### 4.0 Payments and the benefit system

Where volunteers and involvement representatives are in receipt of state benefits as their main income they will need to make arrangements that ensures they stay within the threshold of their benefit conditions. Advice on permitted work rules should be sought in advance of any involvement activity from the Department of Work and Pensions.

Generally this means that paid work must be under 16 hours per week. The number of hours and benefits disregard levels varies, depending on individual circumstances and which benefits are being claimed. Receiving a payment of a fee for involvement is likely to have implications if volunteers and involvement representatives employed, unemployed, receiving state benefits or retired, as the payment received will be treated as earnings.

Any general enquiries relating to payment and benefits should be directed to the Department for Work and Pensions Customer Service. Temporary employment rather than involvement is outside the scope of this guide. Expert advice on stopping and re-starting benefits should be sought, for advice in relation to benefits please contact the benefit enquiry line or your local Citizens Advice Bureau to help answer queries or concerns that arise from being offered (and accepting) involvement payments and having expenses reimbursed when participating in involvement activities.

Please note: It is the individual's responsibility in receipt of any benefits to declare any income received to HMRC

#### 4.1 Useful Contact:

Department for Work and Pensions Customer Service: 0800 055 6688

Benefit enquiry line: 0800 169

Citizens Advice bureau: Citizen Advice Bureau Stoke on Trent; Stoke CAB

(snscab.org.uk) Tel: 03444 111 44



## Appendix 3: Staff request for Involvement representatives

Lead Staff member for the		
activity or project:		
Email:		
Phone number:		
Care group:		
Service:		
What is the activity? i.e Recruitment help with staff training etc		•
Please note: If it is related to an interview, what description/person spec if available.	at position is this for and for which area	or practice? Please attach the Job
What level of engagement are y pathway design project, attendance at a focus		nt a steering group, working on a
Where will the activity take		
place? i.e Teams, in person etc		
Date(s) and times required: Please give as much notice as possible		
How many people are required?	Expect date of comple	
Is an involvement /session fee to depending on level of involvement – please re Coproduction. Travel expenses must be reimb budget holder	fer to SOP for Reimbursement Followir	ng Yes
Plan for the activity: i.e will there be a provided	breaks, will refreshments be	
<b>Staff support:</b> Do you or the team works involvement representatives, required addition co-production?	9	



#### **Appendix 4: Jobcentre Letterhead Template**

Name

Job Title

Address e.g. – Lawton House (HQ)

Bellringer Road

Trentham Lakes South

ST4 8HH

Tel 0300 xxxx xxx ext xxxx

firstname.surname@combined.nhs.uk

PA details (if applicable)

Date

#### To Jobcentre Plus

Mr/Ms/Mrs xxxxxxxxxxxx has been requested to assist North Staffordshire Combined Healthcare Trust (NSCHT) with service user/carer involvement. We wish to ensure that the purpose of involvement is understood and is not mistaken for work.

Our organisation provides mental health and learning disabilities services to people who need them. We work in partnership with people with lived experience, carers and families who use health and social care services to design, develop, deliver, improve and evaluate our services.

#### What is involvement representation and co-production?

People who can offer a perspective because of their personal experiences of using health and social care services are requested to assist in our work.

Guidance for Jobcentre Plus staff refers to 'service users and carers', stating that 'a service user is a person who has used or is using or may potentially use or is otherwise affected by (for example, a carer) services'.

The Department for Work and Pensions have a full description of the meaning of the term 'service user' that applies to all benefits and can be found in Advice for Decision Makers Chapter H3: paragraph 3161. <u>ADM Chapter H3: Earned income - employed earnings</u> (publishing.service.gov.uk)

#### The difference between involvement and work:

Involvement activities should not be mistaken as capacity for work, and recruitment for service user involvement and co-production should not be confused with recruitment for employment. People are recruited because of their personal experiences of using health and social care services.

Service user and carer involvement activities:

- are intermittent and people can withdraw at any time
- vary in length and in frequency, and usually last for a few hours (or less) in any one week
- are individual activities and do not imply future involvement
- may include attendance of quarterly or annual meetings
- may include contributing to intermittent meetings or telephone conferences
- may include helping to prepare for meetings, telephone conferences or events
- may include some follow-up activities after meetings or events

Any payment that is offered for service user and carer involvement is intended to cover preparation, attendance and appropriate follow-up activities.

#### Support provided for mobility and care needs:

North Staffordshire Combined Healthcare Trust provides support measures that are appropriate for each individual, so that people can attend and contribute to our meetings and events in a way that is most appropriate for them.

Some people who we involve may be in receipt of benefits for mobility or care needs. Involvement in activities should not be interpreted as a reduction in the care or mobility needs of service users involved. Support for care or mobility needs is offered as required by the service user or carer and may cover preparation, alternative transport options for travel to and from a venue, and personal individual support both during and after the activity. For example, support may include provision of a personal assistant or a support worker.

#### Payment for service user and carer involvement:

Good practice guidance for service user and carer involvement and co-production recommends that people be offered payment for certain activities such as attending meetings and events that require an element of preparation and follow-up, and that reasonable out-of-pocket expenses should be covered or reimbursed. Please note that:

- NSCHT offers service users and carers who receive welfare benefits which have earnings limits or disregards, the options of involvement on a voluntary basis, or for a lesser payment, if requested
- As involvement activities are often arranged on an ad hoc basis, organisations often pay service users/carers monthly in arrears
- NSCHT payment period may be over a month or more, so we anticipate that Jobcentre
  Plus will treat these payments as averaged over the payment period. See Decision Makers
  Guide Chapter 48 paras 48080-48011 and for a cycle of work paragraph 48094 <a href="Chapter 48">Chapter 48</a>

   General rules on income (publishing.service.gov.uk)

- The Department for Work and Pensions legislation exempts 'service users and carers' from the application of notional earnings and treats reimbursed expenses for service user involvement as ignored. See Advice for Decision Makers Chapter H3, paras 3160 and 3241 <u>ADM Chapter H3: Earned income - employed earnings (publishing.service.gov.uk)</u>
- Service users and carer can withdraw from involvement activities at any time to attend 'employment-related' activities if required by Jobcentre Plus.

Please do not hesitate to contact me if you require further information.
--

Yours sincerely,

[Signed by member of staff]

Name

Job title

#### **Appendix 5: Involvement /Volunteer Letterhead Template**



Address line 1

Address line 2 Postcode

Name

Job Title

Address e.g. - Lawton House (HQ)

Bellringer Road

Trentham Lakes South

ST48HH

Tel 0300 xxxx xxx ext xxxx

firstname.surname@combined.nhs.uk

Dear [name of person providing involvement],

Thank you for expressing an interest in supporting our Trust, on our journey towards being outstanding in all that we do. We are committed to embedding coproduction, involvement opportunities and volunteers across all services within our Trust and recognise that we can not do this without you.

North Staffordshire Combined Healthcare Trust are committed to paying people who use services and carers for their involvement in our work. We are aware that there can be particular complications when accepting a payment from North Staffordshire Combined Healthcare Trust for people who receive benefits.

For most benefits it is essential to inform Jobcentre Plus of any payment you have been offered. Some people may need prior permission from their Work Coach at the Jobcentre before they can agree to paid involvement. It is important to be aware of how much you are allowed to accept. This can be complicated as there are different rates for different benefits. Information on the Department for Work and Pensions (DWP) earning limits and disregards and benefit procedures are set out on the Social Care Institute for Excellence website at: <a href="https://www.scie.org.uk/co-production/supporting/paying-people-who-receive-benefits">https://www.scie.org.uk/co-production/supporting/paying-people-who-receive-benefits</a>

People who are in receipt of benefits because of health issues or disability must take care to prevent any misunderstandings with Jobcentre Plus. It is important to tell Jobcentre Plus

that **service user involvement** is different to work and cannot be used to determine capacity for work.

If you receive a benefit such as Disability Living Allowance or Personal Independence Payment or Attendance Allowance it is important to explain about the support provided for you mobility and/or care needs. This is so that DWP do not misunderstand and think that you have recovered from your mobility needs and/or care needs. I you are unsure you can contact your local JobCentre Plus (National Jobcentre Enquiry Line 0345 604 3719) or Citizens Advice (Consumer Helpline 0345 404 0506).

Below we have included a letter that you can show to your Work Coach at the Jobcentre or post to the Jobcentre when you are advising about your plans for involvement or asking for permission. If you receive a benefit for mobility and/or care needs you should also post the letter to the DWP office that administrates the relevant benefit.

North Staffordshire Combined Healthcare Trust wishes to confirm that we will not communicate with Jobcentre Plus or DWP directly about your personal involvement.

Thank you for your ongoing involvement in our services, we appreciate and value your time and contribution.

Yours sincerely,

[Signed by member of staff]

Name

Job title

## **Appendix 6: Volunteer Agreement**

The Trusts Main purpose is to provide patient centred mental health, specialist learning disability and related services for people of all ages; aiming to be the best in all that we do and working in partnership to deliver services that promote recovery, wellbeing and independent living.

The Trust encourages and welcomes volunteers. This agreement sets out the relationship between a volunteer and the organisation.

This agreement is binding in honour only. It is not intended by the parties to be a legally binding agreement nor is it intended to create an employment relationship between us.

#### Your role as a volunteer

Task(s) that you can be asked to undertake as a volunteer are:

Activities	
Admin & Clerical Support	
Advocacy	
Arts e.g. art, music, dance, textiles, drama, martial arts	
Befriending- simply time to sit and chat with patients/service users	
Craft work e.g. woodwork, pottery, card making, jewellery making	
Events helper	
Food preparation / service	
Fundraising	
Games companion e.g. chess, dominoes, cards, pool, badminton	
Gardening	
Group therapy support	
Involvement in steering group, focus group, forum or similar	
Pampering Sessions (under guidance from staff)	
Walking with patients	
Other:	
IT	

You should not be carrying out tasks which are of a personal or highly confidential in nature, unless authorised by managers.

#### What you can expect from us

The Trust will provide you with:

• An introduction to the organisation and your volunteering role within it.

- Training related to your responsibilities as a volunteer. We hope that you will take advantage of this to improve and maintain your skills.
- A voluntary services co-ordinator who will supervise your volunteering and with whom you can discuss your work.
- A review of your volunteering role after three months. This will normally be carried out by your supervisor and / or the voluntary services co-ordinator.
- Personal liability insurance to cover you while you are fulfilling authorised volunteer work.
- Injury insurance for injuries incurred while fulfilling your authorised volunteer work.
- Reimbursement of your out of pocket expenses. The organisation does not want you to be disadvantaged financially as a result of your volunteering.

#### What we expect from you

We will discuss with you the amount of time that you are willing to commit to volunteering, when you will be available each week, and how your availability will fit in with our needs. If, for any reason, you will not be attending as we have agreed, we would be grateful if you could let us know as soon as possible so that a substitute can be found or different arrangements it be made. If we have no work for you we will let you know as soon as possible.

#### Confidentiality

In the course of your volunteering you will come across confidential information about the organisation, its staff, its patients and service users. You must respect this confidentiality and not use the information for your own benefit or disclose the information, except where required or permitted to do so by law.

#### **Policies**

You will abide by the organisation's health and safety and equal opportunities policies. These can be found in your induction pack alternatively Trust policies and procedures can be viewed on line at <a href="https://www.combined.nhs.uk">www.combined.nhs.uk</a> using your user login / password.

#### Ideas and problems

You may have ideas for the better performance of your duties or of ways in which we can meet our objectives as an organisation. Please discuss these with your supervisor / voluntary services coordinator.

You may run into problems when performing your duty. You should discuss any complaint or problems with your supervisor / voluntary services coordinator.

Your supervisor will discuss with you any issues that he/she may have with your work.

If you would like to change the arrangements for your volunteering or move to a different kind of volunteering, that too should be raised with your supervisor and voluntary services coordinator.

#### Termination:

A four to six week trial placement period will be adopted after which, either you or the organisation can end this agreement.

Print volunteers name:
Signature:
Date: / /
Print supervisors name:
Signature:
Date: / /



## Appendix 7: VOLUNTEERS

MON	ENSES CLAIM TH OF:	vhich paymer	nt is claimed under the Pr	ovisions of the National Healt	h Service (t	ravelling A	llowances	s etc.) Regula	ations 194	17 as am	ende	ed by the (	General C	ouncil					
Circular		villen paymer		Dr/Mr/Mrs/Miss/Ms *De	`			o oto., rtoguit	DETAILS OF VEHICLE USED								_		
OCCUF	PATION				TIME/PA	•		stration Nun	nber					Engine		_			
	ADDRESS ESS OF BASE			TEL No	<u> </u>		Make		S REQL	JIRED \	WHE	N VEHIC		Model					
							Date	of Change	AILS REQUIRED WHEN VEHICLE CHANGED DURI REGISTRATION OF OLD VEHICLE										
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DATE			(Otaliting Folint, Flace	visited, i mishing i omit)	Actual Mileage	Official Mileage	Transpor Rate	Passenger Mileage	T-Taxi R-Rail B-Bus	Amoui £	nt p	From am/pm	To am/pm	Amou £	ınt p	Details	Amou £	n	
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NPAYMENI
the duty stated on the date(s) show
DATE CLAIM RECEIVED
DATE OF AIM PROOFCES
DATE CLAIM PROCESSED
e ve





## **Appendix 8: Involvement Timesheet**

Important Note – All parts of the claim form **MUST** be completed or no payment will be made.

Name	Role					Volunteer /Involvement / Co-production		
	Hourly Rate = £7 per hour							
	Start Time	Finish Time	Payable Hours *	Team worked with / (Area of Work )	Sign	nature of Supervisor	Confirmed By	
Monday								
Tuesday								
Wednesday								
Thursday								
Friday								
Saturday								
Sunday								
		Total						

<sup>\*</sup> Payable Hours are Exclusive (not including) of meal & other breaks

<b>\</b> / _		C:	<b>4</b>
VO	lunteer	Nigna	TUIP:
		91511U	

_	aim for payment of the above hours, which were wor p with the word "Duplicate".	ked by me for the organisati	on shown. This is the original time she	et unless marked					
Signature		Date							
Name		Address							
Payment Authorised By:									
This will be the Recovery and Experience Lead/ Patient Experience Facilitator. Once signed the sheet should be sent to the Pay Services Department for payment.									
Signature		Date							
Printed Name		cost code							