Service User and Carer Expenses Policy

Report of Public Engagement
June 2009

<table>
<thead>
<tr>
<th>Author(s)</th>
<th>Julia Stackhouse, Patient and Public Involvement Officer</th>
</tr>
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1. About Oxfordshire PCT

Oxfordshire Primary Care Trust (PCT) was formed on 1st October 2006 and is responsible for investing approximately £760m of public money each year in services that will improve the health and well-being of around 630,000 local people.

Oxfordshire PCT is responsible for purchasing health services for the population, for managing the performance of healthcare providers such as hospitals, mental health services, GPs, other primary care contractors and voluntary organisations. It is responsible for improving local health services such as dentists, GPs and pharmacists and for delivering faster and better access to health care for everybody. It is also a major provider of health services to the public, employing over 2,000 community health professionals across the county through its community services directorate – Community Health Oxfordshire.
2. About Oxfordshire County Council – Social and Community Services

Oxfordshire's Social and Community Services provide social care, community support, libraries and adult learning for the people of Oxfordshire.

Social care has a budget of over £325m and covers a wide variety of people and types of support, including help for older people, the physically disabled, people with learning disabilities and those with mental health needs. There is a great deal of overlap with the PCT and there is a lot of partnership working involved both in delivering services and developing plans to better help people in Oxfordshire.

Oxfordshire County Council provides about 2,300 residential and nursing home places, but the majority of clients are those helped to live independently - currently there are about 20,000 such people. Helping people to live independently means providing equipment, care at home, disabled badges for cars, and support in the community for people with services like day centres and respite care. There is also a degree of overlap with health services in intermediate care, which is designed to help people rehabilitate after a stay in hospital, or to forestall a need for hospital treatment.

Recently, there is a move towards greater choice of care packages and as such there has been an almost threefold increase in Direct Payments to clients in the last five years. Social services also support third sector (charity) organisations, and in the last year have provided over £6m of funding, helping nearly 7,000 people.

Community services, has a net expenditure of over £12.5m, the majority of which is invested in libraries, who have over 100,000 registered users. In addition to this there are other important areas including arts, music, registrations and adult learning (who cater for nearly 8,000 mature students).

As a directorate that covers such a wide variety of services and partnership working it is important to have a 'joined-up' approach to make sure that resources are spent in the most effective ways. Social and Community Services have developed strong ways of coordinating working with internal departments as well as our partners in the PCT, District Councils and charities. One example of this is the Joint Strategic Needs Assessment that aims to provide an overview of health and social needs across Oxfordshire.
3. **Executive Summary**

3.1 **Background**
Oxfordshire Primary Care Trust (PCT) and Oxfordshire Social and Community Services (OSCS) have been working in partnership to develop a joint user and carer expenses policy to establish principles and protocols for reimbursing patients and the public out of pocket expenses and to remunerate certain activities as defined in the policy.

This policy has been developed in accordance with the principles set out in Department of Health’s Reward and Recognition Guidance.

Whilst it is recognised that individuals may obtain personal satisfaction from being involved, it is unreasonable to expect them to resource their own involvement as this runs the risk of excluding people on financial grounds.

The joint user and carers expenses policy will help staff in all roles and settings identify how they can best support all those wishing to contribute their time, experience and skills, while acknowledging that individuals have different needs. Although service user involvement may be completely on a voluntary basis it is good practice to offer to reimburse volunteers’ out of pocket expenses and this policy has been developed to enable those individuals to claim payment for their time should they wish.

3.2 **Purpose of the public engagement report**
The Communications and Public Involvement team at Oxfordshire Primary Care Trust (PCT) and the Taking Part user and carer involvement team at Social and Community Services (OSCS) embarked on a 3 month period of public engagement activity from March 2009 - June 2009, to engage and involve Oxfordshire residents in the development of a payment policy for users of services and carers involved with the work of the PCT and Social & Community Services. This report will inform and shape the final joint policy and actions contained in the report will be the first step in the development of the procedures required to deliver the new policy.

3.3 **Purpose of engagement**
Oxfordshire Primary Care Trust and Oxfordshire Social and Community Services value and recognise the importance of involvement and engagement in all areas of their work.

In delivering any consultation process Oxfordshire PCT and Oxfordshire Social and Community Services will follow the PCTs communications and public involvement principles.
3.4 Process & Methodology
A working group was established with representatives of various departments across the PCT and Social and Community Services, users of services and the voluntary sector. Three surveys were developed:

1. Service User and Carer Survey – this was circulated to individual members of the public not affiliated to an organisation or staff. It was targeted by email to existing members of the public that claim expenses, to mental health service users and to LINKs members. (Appendix 2)
2. Voluntary Sector Organisation’s Survey – this was circulated to the voluntary sector via OCVA and through direct email. (Appendix 3)
3. Staff Survey – this was circulated to all staff within Oxfordshire PCT and Oxfordshire Social and Community Services. It was also emailed to specific staff with the PCT for comment. (Appendix 4)

3.5 Key Findings
In total 86 survey responses were received during the consultation. 50 responses from individual service users and carers, 24 responses from staff and 12 responses from the voluntary sector.

Overall, the key issues and themes that were raised were:

- Training for staff on delivering the policy and the duty to involve
- Wider publicity of the policy to service users and carers
- Concern around remuneration and the implication on benefits
- Clearer guidance for staff on when to provide remuneration and reimbursement
- The process for payment of expenses needs to be quicker
- Cheque payment for expenses can be problematic for some, petty cash would be better for smaller claims
- Clarification is needed about what expenses are covered under the policy, ie: lunch?
- Levels for involvement need to be clear, currently the definitions are confusing
- Interpretation of policy needs to be considered for other non-english speaking communities
3.6 Conclusion and Next Steps

In conclusion the policy has been well received by all groups and individuals that provided feedback. Clearly there are some processes that will need clarification and these will impact on the next stage of the project.

The next steps and recommendations for this project are to:

- Develop clear guidance for staff and managers who are engaging with members of the public in their work
- Develop clear guidance for those individuals who wish claim from the policy
- Deliver training to staff within both organisations
- Ensure that the policy and process is widely publicised to staff and service users and carers
- Review the policy and process on an annual basis to ensure it remains effective
- Feedback results of consultation to all those that participated
- Ensure that policy is clear particularly with regard to the levels of involvement and responsibilities for those individuals on benefit
4. Background

4.1 The wider context

Section 242 (1B) of the NHS Act 2006 places a duty on NHS organisations to involve and consult with patients and the public on:

- planning of the provision of services
- the development and consideration of proposals for changes in the way those services are provided
- decisions to be made by the NHS organisation affecting the operation of services.

Service users and carers contribute their time and expertise to improving services.

Section 242 of the NHS Act 2006 has been further strengthened by the Local Government and Public Involvement in Health (LGPIH) Act 2007. The new duty came into force on 1 April 2009, and is set out in Part 7, section 138 of the Local Government and Public Involvement in Health (LGPIH) Act 2007. It applies to both Oxfordshire PCT and Oxfordshire Social and Community Services.

The Duty to Involve seeks to ensure people have greater opportunity to have their say. The aspiration for the new duty is to embed a culture of empowerment and engagement across all of the council’s functions.

The duty to involve specifies three ways of involving:

- providing information about the exercise of the particular function
- consulting about the exercise of a particular function
- involving in another way
4.2 The local context

Oxfordshire PCT has identified within its Communications and Patient and Public Involvement Strategy a set of principles as follows:

- Communications and public involvement must be embedded in the organisation
- Communication and public involvement are two-way processes involving listening as well as informing
- Effective communication and public involvement must support equity and accessibility
- Good communication and public involvement build and enhance trust
- Communication and public involvement are learning tools
- Effective communication and public involvement require planning and preparation.

Oxfordshire County Council set out below the following principles in their consultation and involvement strategy:

The following six principles underpin and guide all consultations and involvement exercises:

- **Be necessary** – consultation should only be undertaken when the council has a genuine reason to seek feedback to confirm, inform, influence or review service delivery, policy development or council policies.

- **Be proportionate** – the inputs of consultation (financial, staff, consultees’ time etc.) must be proportionate to the potential impacts of the consultation findings. Consultation should demonstrate value for money and be conducted in a coordinated way to avoid duplication of effort and consultation fatigue.

- **Be robust** - consultation must be undertaken in an open and honest way. This means being clear about the purpose and scope of the consultation and how its outcomes will be used. It also means consulting at a time when issues and proposals are still at a formative stage and providing sufficient information to allow people to give intelligent and considered responses.

- **Be accessible and inclusive** – consultation should allow all interested parties to have their say and give them adequate time to do. Special efforts should be made to engage those who are not usually consulted by using a range of methods and working in partnership with others.

- **Be coordinated** – consultation should be integrated into business planning and management. Every effort should be made to join-up consultations across services and partners in order to avoid duplication of effort, over consultation of groups & individuals; and to share learning as widely as possible.
• **Be used**—consultation findings should be reported in as reliable and representative as possible. All views expressed in a consultation should be taken into account when the council makes decisions and the council must explain in advance how it will do this. Feedback should be provided on the outcomes of consultation.
5. Why are we doing this?

5.1 The importance of paying service user and carer expenses and remuneration
The Service user and carer expenses policy defines a principle for Oxfordshire PCT and Oxfordshire Social and Community Services staff who are engaging service users and carers in their work.

The policy has been developed based on the principles set out in the Department of Health’s Reward and Recognition Guidance, which states:

- service users are not to be left out of pocket or put at risk of being financially worse off as a result of their involvement in service improvement
- service providers and service users will discuss and agree on the terms of involvement prior to committing to it
- service users are given the right information at the right time to be able to make an informed choice about how and on what terms they want to be involved
- the contribution service users make can be recognised and valued in all sorts of ways such as being thanked, positive feedback and acknowledgement, staff time, practical assistance, training, personal development or seeing the impact of the work and changes made as a result of involvement. Payment can also be offered for certain levels of involvement
- a wide range of service users, with different needs and experiences are encouraged and supported to be involved. The way that payment and/or reimbursement of expenses are settled should not needlessly create barriers that deter service users from being involved
- service users in receipt of benefits should be provided with the right information and support to prevent a breach of their benefit conditions. Breach of benefit conditions can result in benefits being stopped
- service users are paid according to open and consistent criteria that takes into account
- the level of involvement, the type of work and the skills and expertise required
- paperwork to claim payment and reimbursement is kept to a minimum. Where paperwork is necessary to safeguard both the service provider and the service user, it should be accessible and easy to understand

5.2 Why are we doing this consultation?

The PCT and Oxfordshire County Council (Social and Community Services) want, whenever possible, to make payment available for patients/carers/service users and the public who are working with the PCT and Oxfordshire County Council (Social and Community Services) in the planning, commissioning and delivery of services.

The purpose of the consultation process is:

- To gather views, feedback and comments on the proposed policy and process for the reimbursement and remuneration of service users and carers who are involved in the work of the PCT and Oxfordshire Social and Community Services.

- To ensure Oxfordshire PCT and Oxfordshire Social and Community Services provide an equal, inclusive and fair service to the people of Oxfordshire.

- Through the results of the consultation and engagement, to shape and inform the Service User and Carer expenses policy and the associated processes.

5.3 Targets for consultation

The main target groups for this consultation included existing claimants of expenses, established stakeholder groups and local members of the public in Oxfordshire.

- Individual members of the public not affiliated to an organisation or staff. Specifically targeting by email all existing members of the public that claim expenses, to mental health service users and to LINKs members.
- Voluntary Sector Organisation via OCVA and through direct email.
- All staff within Oxfordshire PCT and Oxfordshire Social and Community Services.

In total through direct contact, postal and email communication, this draft policy has been circulated to approximately 1800 individuals, groups, organisations and networks, as well as being publicised widely amongst PCT and Social and Community staff.
6. Engagement process

6.1 Service User and Carer Expenses Policy Group

A project group was formed to guide the development of the Service user and carer expenses policy. The group consists of staff from the various areas of the PCT and Social and Community Services as well as patient representatives and members of the voluntary sector. Full membership of this group is shown in Appendix 1.

6.2 Surveys

Three questionnaires (Appendices 2, 3 and 4) were designed to ask respondents what they thought about the proposed policy and process for the reimbursement and remuneration of service users and carers involved in the work of the PCT and Social and Community Services.

The questions in these surveys were designed in consultation with the service user and carer expenses policy group.

The PCT and Social and Community Services distributed the questionnaire across Oxfordshire in both hard copy and electronically via a number of different networks and routes.

6.3 Survey – Other formats

The Service user and carer expenses survey was also produced in an ‘Easy Read’ version – uses simple to understand words, large and appropriate pictures to deliver the message. An easy read booklet was also produced (see Appendix 5).

6.4 Service user and carer expenses policy consultations

A number of meetings took place from March 2009 to June 2009 where the PCT and Oxfordshire’s Social and Community Services actively sought to meet and engage face-to-face with small groups of individuals. We were able to consult directly with hard to reach groups, older people, representative groups for learning and physical disabilities, mental health as well as carers and adults of working age. A full list of those groups is included in Appendix 6.

6.5 Other methods of engagement

Oxfordshire PCT also sought to engage the public and gather feedback using other communication methods:

Intranet – Oxfordshire PCT’s new intranet was used to communicate the online survey to all PCT staff
across the county, with new items and links on the site regarding the Single Equality Scheme.

**Staff Bulletin** – In addition to the intranet the scheme was communicated to all staff in the regular staff bulletin.

**Corporate Induction** – the consultation was communicated to some staff attending corporate induction

**All Staff email** - the consultation was communicated widely to all PCT staff via the everyone@ email facility.

In Social and Community services communication to staff also included the internet and intranet, and ‘in brief’ the OCSC staff bulletin. In addition to these methods OSCS used internal training events to communicate with staff and other providers.

**Email** – An email campaign promoting the Service user and carer expenses policy and inviting feedback via hard copy or online survey, email response or telephone was communicated to a large target audience of nearly 1800 community and voluntary groups across the county. This email campaign was run once at the start of the campaign and then again half way through to have maximum impact.

**Websites** – The consultation was publicised on the Oxfordshire PCT and Oxfordshire County Councils’ websites.
7. Engagement Findings - Survey

In total 86 survey responses were received during the consultation. 50 responses from individual users of services and carers, 24 responses from staff and 12 responses from the voluntary sector. Of that total, the majority were received by post or by hand at a variety of public events with the remainder completed online.

Respondents were asked a range of questions about the new proposed policy and the service that they have received to date when claiming reimbursement or remuneration. Demographic details were collected to help us to understand the range of respondents.

7.1 Demographic information

The result of the demographic information has been taken from all 86 survey respondents. This information has not been separated by the type of the survey completed and is shown as a whole for the total number of respondents.

**Gender**

Significantly more women than men responded to this survey. This may be due to a number of factors such as the large proportion of female staff at the PCT and the active involvement of women in community groups.
**Ethnicity**
Whilst a significant proportion of responses came from the White population, it is important to note the diversity of responses from other ethnic groups. Direct consultation took place with the Chinese, Asian and BME communities which are not reflected in the survey responses.

![Ethnicity Chart]

**Location**
A significant response to the surveys came from individual service users and carers. This was expected as existing users of the policy were directly contacted for their views. A significantly lower response was received from Social and Community Services, but this is to be expected as this policy is a new development following the introduction of the new Local Government and Public Involvement in Health (LGPIH) Act 2007 which only came into force on 1st April 2009.

![Location Chart]

**Disability**
Of the individuals surveyed only 15 of those individuals defined themselves as having a disability.

![Disability Chart]
How did individuals find out about the survey?
The main way that people knew about the survey was through direct contact with the PCT’s Patient and Public Involvement (PPI) Team and the Social and Community Services’ Taking Part Team. This shows that people are keen to get involved when approached directly for their involvement.
7.2 Questionnaire responses from PCT staff and Voluntary Organisations

7.2.1 Questions common to both surveys

The NHS Act 2006 and the Local Government and Public Involvement in Health Act 2007 place a duty on NHS and Local Government organisations to duty includes? (Question 4 voluntary sector survey and Question 5 staff survey)
Most respondents were aware of the duty to involve, however 5 staff indicated that they were not familiar with this duty.

Do you think that the joint service user and carer expenses policy is fair and inclusive to all users of services and/or carers? (Question 7 voluntary sector survey and question 8 staff survey)
The majority of respondents (26) felt that the policy was fair and inclusive. Of the 10 who responded indicating that they felt that it was not fair to all groups, three particularly referred to disadvantages for carers. There were also concerns for those in receipt of benefits.

'Childcare for autistic children is very difficult to arrange. If family members are not able to claim payments to allow parents to attend meetings they may not be motivated to help out'

'Difficult for those on benefits or those without the entitlement to work'

Are there any gaps in the Policy? (Question 8 voluntary sector survey and Question 9 staff survey)
The majority of respondents welcomed the policy but identified that there is a need for guidance for those in receipt of benefits.

'There is still not much clarity about how claiming expenses will affect carers/service users benefits status'

'It needs to be as clear as possible when service users will get expenses and when they will get payment'

'Very helpful to have one system across PCT and County Council'
How do you think that this Policy will influence whether people claim expenses? (Question 9 voluntary sector survey and Question 10 staff survey)
The majority of respondents felt that this policy will increase the numbers of people who will claim expenses. A small number of respondents felt that this policy would not change current practice because of the impact on those who claim benefits.

'It may discourage some service users who currently do a lot of work from claiming because for tax/benefit reasons'

'People with learning disabilities will need advice on payments and effect on benefits and this may cause problems and discourage claims'

'Yes - however awareness among staff on how to implement this strategy will be crucial to achieve this'

The Policy aims to show that the PCT and Social and Community Services are committed to service users and carer involvement. Do you think that this Policy truly reflects that commitment? (Question 10 voluntary sector survey and Question 12 staff survey)
The majority of respondents agreed that this policy shows the commitment of the PCT and Social and Community Services to service user and carer involvement. A small number of respondents felt that the commitment would truly be reflected by the utilisation of the policy and through wider involvement activities.

'It only indicates full commitment if it is actively used'

'Involvement is not just about payment/reimbursement'

'Commitment is not just about expenses- it is about taking on board what people say and providing feedback (not easy!)'
7.2.2 Questions specific to the Voluntary Sector Survey

Have you recommended members get involved in the work of the PCT & Social and Community Services? (Question 3)
All voluntary sector respondents said that they would recommend their members to get involved.

Are your members currently offered the opportunity to claim expenses and reimbursement from the PCT or OSCS, provided they are not representing an organisation? (Question 5)
The majority of respondents said that their members are encouraged to claim expenses from the PCT and Social and Community Services, however, it is clear that this does not happen in all case and that clear guidance is required for the voluntary sector to ensure that this does happen.

'sometimes yes, sometimes no- ground notes seem to change/ be unclear'

If you answered ‘no’ or ‘Do not know’ to Question 5, please tell us about the reason for this. (Question 6)
The majority of respondents that answered ‘No’ or ‘do not know’ said that this was because they weren't aware that the facility to claim expenses from the PCT or Social and Community Services existed.

7.2.3 Questions specific to the Staff Survey

Have you involved service users and carers in your work and if so how often? (Question 4)
24 members of staff from the PCT and Social Community Services responded to this question. 21 members of staff reported that they had involved service users and carers in their work and of these more than half regarded it as integral to their work. Just three reported that they did not involve service users and carers.

Do you currently offer the users of services and carers you work with the opportunity to claim expenses and reimbursement? (Question 7)
The majority of respondents do offer service users and carers the opportunity to claim expenses and reimbursement. Six respondents answered that they were unaware that this service existed but that they would like to find out more.

'We have used the current policy to pay expenses associated with attending meetings and paying consultancy fees for one-off contributions towards commissioning of new services'
Do you think more staff will offer expenses and reward to service users and carers, now that there is a Policy? (Question 11)

The majority of respondents felt that this policy would enable more staff to offer expenses and reward to service users and carers, if the right support and guidance was put in place for staff and users of services. Just two respondents felt that it wouldn’t.

‘Yes - as mentioned above with the right amount of awareness and support to implement the policy’

‘It is crucial to have clear policy and process from the beginning, so that both staff and claimants know what is and is not eligible’

7.3 Key messages from staff and the voluntary sector

The key message from staff and the voluntary sector is that as a whole we do offer service user and carers expenses and we are aware of our duty to involve service users and carers in our work. The policy is a welcomed document that clearly recognises the value of service users and carers in our work. There have been some concerns raised around the functionality of the policy and a clear message to Voluntary Sector organisations is required to inform them that the opportunity for claiming expenses and reimbursement is available to their members.

7.4 Key suggestions for improvement from staff and the voluntary sector

Some key areas that still need to addressed and clarified are:

1. Developing practical guidance for staff applying the policy
2. Include guidance for the service user and/or carer with examples of the type of work that could be undertaken
3. Further consideration needs to be given to those individuals on benefit or that do not have the right to work
4. There needs to wide dissemination of the Policy so that staff know how to use it and for those in the voluntary sector to ensure that they are more aware of it
5. A practical short guide to claiming and using the policy should be developed
6. A need to help staff to engage with hard to reach communities
7.5 Questionnaire responses for individual service users and carers

How did you first become aware of involvement activities at the PCT and Social and Community Services? (Question 8)

43% of respondents get involved because they are directly asked, 24% of people by word of mouth and 12% gave other reasons.

Only 4% responded to an advert or through the PCT website. None of the respondents had got involved as a result of information on the Oxfordshire Social and Community services website.

What are your reasons for being involved in the work of the PCT and Social and Community Services? (Question 9)

The top 4 reasons why people get involved in the work of the PCT and Social and Community services are to:

1. To change and improve health and social care services
2. To give something back
3. To learn more
4. To meet other users of services

Just seven respondents get involved to learn about a specific condition.

'As a full time carer I think it’s a valuable way to give/receive info.’

'To further my own knowledge of mental health’

'To improve services for those with Autistic spectrum conditions’
How many times have you been involved in the last 12 months? (Question 10)
28% of respondents get involved 1 -2 times a year, 24% got involved 6-10 times a year and 13% were involved in excess of 25 times in one year.

To what extent do the following influence how much you are involved with the PCT and Social and Community services work? (Question 11)
Of the responses received, 20 respondents felt that reimbursement of out of pocket expenses influenced whether or not they would get involved and felt it was important to get their expenses. 13 respondents felt that being paid for their time was important but interestingly 14 respondents felt that being paid wasn’t. Whilst only 4 people felt claiming expenses was not important.
When you get involved in the work of Oxfordshire PCT and/or Oxfordshire Social and Community Services, do you claim travel or other expenses? (Question 12)
19.6% did not claim expenses for their involvement work. 80.4% said that they do claim.

Are these always paid on the day? (Question 13)
This was split almost evenly between those who sometimes or always received expenses on the day (47%) and those who did not (53%).

If you have not claimed travel or other expenses, please could you tell us why? (Question 14)
For some of the respondents they didn't claim expenses because they are eligible for free public transport. Others felt that they were happy to cover their own travel costs and therefore didn't want to claim and for others they were able to claim through other organisations. Only person didn't claim because they didn't know the facility to claim existed.
When you get involved in the work of Oxfordshire PCT and Oxfordshire Social and Community Services, do you claim payment for your time, expertise and involvement?  (Question 15)
65% of respondents do not claim payment for their time.  33% do claim.

If you have not claimed payment, please could you tell us why?  (Question 16)
25 individuals gave feedback to this question.  The two main reasons given were that they were concerned about the impact on their benefits, or because they feel that their work should be voluntary.  For some it is clear that they were not offered the opportunity to claim payment.

'It has not been offered or expected'

'I feel strongly that it should all be voluntary so can be fully independent'

'It might interfere with my benefits.'

If you have claimed travel expenses and payment, how long approximately has it taken for you to receive the payment?  (Question 17)
Of the 26 individuals that answered this question, 11 received their expenses on the day, but a further 9 said that they had to wait 4-6 weeks for payment.  6 received payment within 2 – 3 weeks.

How was this payment paid to you?  (Question 18)
Of the 26 individuals who have claimed expenses, 13 received payment by cash.  10 received payment by cheque and 3 received payment direct to their bank.

Are you in receipt of statutory benefits, e.g.: income support, disability living allowance?  (Question 19)
22 respondents do claim benefits, 24 said they don’t and 2 preferred not to comment.
If you have answered yes to question 19, do you still claim expenses and payment? (Question 20)

Of the 22 respondents that do claim benefits, 14 of them go on to claim expenses and payment. We received a small number of comments, all of which indicated that the claimants only made claims for out of pocket expenses.

'I claim travel expenses so not to be out of pocket. I do not claim for my time as to maintain independence'

If you answered No to questions 19 & 20, please explain why, you don’t claim expenses? (Question 21)

Of the individuals that responded to this question, most commented that they do claim for expenses but do not claim for their expertise, some because they were unaware of this opportunity.

'I have claimed travel expenses but was never offered payment for expertise etc.'

If you have answered yes to questions 19 & 20, have you taken advice about what you have to declare? (Question 22)

10 respondents answered yes they have sought advice. 9 had not.

If yes, where did you get advice from? (Question 23)

Of the 10 people that had taken advice, 5 had gone to their Citizens Advice Bureau, 3 had received advice from the project they were supporting, and 1 through their GP and 1 had paid for advice.

In addition to these, additional comments were given by the respondents of other places where advice could be given.

As a user of services/carer do you think this policy will put barriers to you claiming? (Question 24)

The majority of respondents did not think that the policy would be a barrier to them claiming. Only 2 respondents felt that it would because of concerns for those claiming benefits and because they felt that the policy was confusing.

'Proposed levels are very confusing at least in the description'

'As much as it feels good to be given fringe benefits just like those employed get, we on benefit would be penalised regardless of our active contribution no matter how valuable to the policy makers'
**Are there any gaps in the Policy?** (Question 25)

It is clear from the comments received that the Policy requires further supporting guidance to identify the process for claiming. The majority of responses were seeking clarification on the process and delivery of the policy.

‘Claiming - say a single or return bus ticket under - is more expensive to travel to bank it, a bit embarrassing too’

‘I feel that occasional rewards to service users or those on benefit is a very “caring” way of collecting valuable information from those on benefit - without making them feel guilty or stressed further for doing a valuable job,

‘No gaps in policy but need more user representatives involved in the process’

**Would you be more likely to claim expenses as a result of this policy?** (Question 26)

83% of respondents felt that they would be more likely or about the same to claim as a result of this policy. Only 1 person said that this policy would have a negative effect on them claiming. The reason for this was because of the impact of the policy on individuals receiving benefits.

‘The stress imposed when I declare what I have claimed for doing a good job is more than the joy of (feel good factor) getting a reward for the job done - it takes a long time to sort the benefit out - from talking to others who have been there - honestly.’
This Policy aims to show that the PCT and Social and Community Services are committed to service user and carer involvement. Do you think that this Policy truly reflects service user and carer needs? (Question 27)

58% of respondents felt that this policy is a step towards showing commitment to the needs of service users and carers. The key messages were that for the policy to truly reflect the needs of service users and carers it needs to be clear with easy to read words. The delivery and use of the policy will show a commitment, however clear guidance for individuals using the policy needs to be developed. Concern was also raised about the impact the policy will have on those individuals that are in receipt of benefits, especially relating to out of pocket expenses and how payment by will be made by the PCT and Social and Community Services. 43% of respondents felt that the policy does meet their needs.

'As ever the theory is not necessarily born out in practice'

'Carers on benefits are still penalised as if they claim payment they can loose their benefits so the least well off yet again are disadvantaged'

'As I am not working and am giving my time I would like to be paid. It gives me an income and makes me feel good'

7.6 Key messages from service users and carers

The majority of service users and carers that gave feedback during this consultation get involved in our work because they are directly approached and asked. Interestingly once involved the majority of respondents continue to be involved because they want to change and improve health services.

For the majority of services users and carers reimbursement is a priority over payment. 80% of respondents do not claim payment, as some see themselves as a volunteer, others didn’t know they could and for some because it will impact on their benefits.

In general the policy is welcomed to support the practice that has been in place for the last couple of years. However more clarity within the policy of roles and responsibilities was needed, and better information for the public and staff should be available about what ‘fringe benefits’ are available.
7.7 Key suggestions for improvement from service users and carers

- The process for payment of expenses needs to be quicker
- Cheque payment for expenses can be problematic for some, petty cash would be better for smaller claims
- Clarification is needed about what expenses are covered under the policy, e.g.: lunch?
- Levels for involvement need to be clear, currently the definitions are confusing
- Interpretation of policy needs to be considered for other non-english speaking communities
- Clear guidance about getting guidance on declaration for those receiving benefits is important

8. Engagement Findings from face to face consultations with groups

8.1 Consultation Process

In addition to the survey, Oxfordshire PCT and Oxfordshire Social and Community Services sought the views of a range of stakeholders through consultation with relevant charities, community and voluntary organisations. It was recognised that in order to have two way discussion and informative feedback with these groups, was to meet with them at their own premises.

Appendix * shows all the groups that were directly consulted with. Copies of the draft policy and the surveys were circulated to each member of the group. A brief discussion about the policy was given and key questions were asked at each group for their consideration:

1. What are the main barriers to getting involved for this group?
2. Would you wish to be paid for your time?
3. How would you like to receive payment?

For those groups that were consulted with by Social and Community Services, a general discussion took place and feedback was recorded.

8.2 Findings - what’s working

The general views from the different groups that were consulted was that this policy is a welcomed development across both organisations from both the public and staff. In general reimbursement was felt to be an important issue for service users and carers but that clearer defined processes for staff were needed.

- Positive feedback from staff groups about the development of a policy
- BME groups happy to see recognition of their feedback
- Should people be paid 'consultancy fees'? Not everyone wants to be paid for their time; they would rather give their experience and knowledge free of charge.
- There is an issue about people presenting an independent view, and are they still able to say whatever they want if they are being paid?
8.3 Findings - what’s not working/ missing
In general the view of remuneration for service users and carers was mixed. Some groups felt quite strongly that payment was not necessary whilst others felt that it was important or should at least be optional.

- Options for payment in the form of vouchers or contributions to groups
- Individuals want an option for how they will be paid
- Levels of involvement need guidelines
- Participation and involvement seems fragmented – there are differences between adult services and children’s services
- Training is needed to give people confidence to talk to professionals and feel equal
- What about small claims (under £20)? It may cost people to pay in cheques.
- Policy needs to explain what volunteering means
- Replacement care costs would not be appropriate, for individuals that do not have English as their first language
- Reimbursement on the day is wanted

8.4 Findings – suggestions
From the groups that were consulted with the following areas for improvement were given:

- Encouragement that the policy should be rolled out across the whole of county council
- Accountability - clarification around whether people are employees
- Consistency of policy needs to be in line with mental health NHS trust
- Practical guidelines for staff needed

9. General Feedback
In general the feedback was positive. The policy is a welcomed document for both the PCT and Social and Community Services. As a general theme it was felt that volunteers should automatically be offered the opportunity to claim expenses and remuneration as appropriate and that staff should be appropriately trained to deliver the policy consistently across both organisations.
10. Next steps and recommendations
The next steps and recommendations for this project are to:

- Develop clear guidance for staff and managers who are engaging with members of the public in their work
- Develop clear guidance for those individuals who wish claim from the policy
- Deliver training to staff within both organisations
- Ensure that wider knowledge amongst staff exists to ensure that the policy and practice of offering reimbursement and remuneration is automatic in both organisations
- Review the policy and process on an annual basis to ensure it remains effective
- Feedback results of consultation to all those that participated
- Ensure that policy is clear about the different levels of involvement
- Responsibilities for those individuals on benefit

11. Thanks
We would like to thank all those individuals who took the time to read the draft policy and offer their views and comments. In addition thanks to staff who have been working to develop the policy and ensured that the consultation was as wide possible.

12. Supporting information

Definitions

Stakeholders
- A person or group with a direct interest, involvement, or investment in something.
- Stakeholders are individuals or organisations that have a direct interest in a service being provided.

Glossary

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<td>PCT</td>
<td>Primary Care Trust</td>
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