Service User and Carer Expenses Policy

Summary Document
September 2009
1. Introduction to the policy and consultation
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.

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.

2. The Consultation
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.

How was the consultation delivered.
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:

- 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.

- Voluntary Sector Organisation’s Survey – this was circulated to the voluntary sector via OCVA and through direct email. (Appendix 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)

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.

For the community groups that we spoke to copies of the draft policy and the surveys were given to each member of the group. At each meeting, a brief
introduction of the policy was given and the groups were asked to consider the following questions for discussion:

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.

3. What response did we get?
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.

The general views from the different groups that were consulted were 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.

4. The recommendations.
As a whole the policy was 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 comments and feedback from the consultation comes in two phases, the first to make specific changes to the policy as a result of peoples comments and the second to develop a package to aid members of the public and staff to use the policy.

Specific feedback on changes to the policy include:

- Clarifying which expenses are covered under the policy, e.g.: lunch?
- Clarifying the levels for involvement and including clear definitions
- Interpretation of policy needs to be considered for other non-english speaking communities
- Clarifying participation and involvement between adult services and children’s services
- Clarification around the definition of volunteering
- Clarification around accountability, defining whether or not people are employees

5. So what are we doing next:
A task and finish group has been set up to deliver the recommendations as set out in the full report. The Task and Finish group has representatives from both the PCT and Social and Community Services. Since the consultation we have actively asked those individuals that fed into consultation if they would like to be part of the Task and Finish group and we have successfully
appointed 4 members of the public to sit on this group and to help to deliver the recommendations and proposed changes that came out of the consultation.

Specific actions for the task and finish group include:

- Developing clear guidance for staff and managers who are engaging with members of the public in their work

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

- Developing clear guidance for those individuals who wish claim from the policy

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

- Delivering training to staff within both organisations

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

- Ensuring that the policy and process is widely publicised to staff and service users and carers

'\text{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}'

- Ensuring that policy is clear particularly with regard to the levels of involvement and responsibilities for those individuals on benefit

'\text{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.}'

- Reviewing the policy and process on an annual basis to ensure it remains effective

- Feeding back results of consultation to all those that participated