

## Checklist for the Review and Approval of Procedural Documents

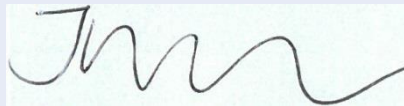
To be completed and attached to any document which guides practices when submitted to the appropriate committee for consideration and approval.

	<b>Yes/No/Unsure</b>	<b>Comments</b>
<b>Title of Document</b>		Herts Valleys CCG volunteer and reimbursement re-imbursement policy for patients, carers and public engaged in patient and public involvement activities
Could this policy be incorporated within an existing policy?	No	
Does this policy follow the style and format of the agreed template?	Yes	
Has the front sheet been completed?	Yes	
Is there an appropriate review date?	No	
Does the contents page reflect the body of the document?		
Are there measurable standards or KPIs to support the monitoring of compliance with and effectiveness of the document?	No	
Are all appendices appropriate and/or applicable?		No Appendices
Have all appropriate stakeholders been consulted?	Yes	Through PPI Committee
Has an Equality Impact Assessment been undertaken?	Yes	
Is there a clear plan for implementation?	Yes	
Has the document control sheet been completed?		
Are key references cited and supporting documents referenced?	No	

Does the document identify which Committee/Group will approve it?	Yes	PPI Committee
Plans for communicating policy to – staff; practice membership; public (as appropriate)		As part of ongoing engagement and participation

### Individual Approval

If you are happy to approve this document, please sign and date it and forward to the chair of the committee/group where it will receive final approval.

Name	Juliet Rodgers	Date	30.04.2018
Signature			

### Committee Approval

If the committee is happy to approve this document, please sign and date it and forward copies to the person with responsibility for disseminating and implementing the document and the person who is responsible for maintaining the organisation's database of approved documents.

Name	PPI Committee	Date	30.04.2018
Signature			

## **Volunteer and Re-imbusement Policy for Patient, public and carer engagement in patient and public involvement activities**

<b>Version Number</b>	V1:1
<b>Ratified By</b>	PPI Committee
<b>Date Ratified</b>	
<b>Name of Originator/Author</b>	Heather Aylward
<b>Responsible Director</b>	Juliet Rodgers
<b>Staff Audience</b>	All
<b>Date Issued</b>	
<b>Next Review Date</b>	

### DOCUMENT CONTROL

Plan Version	Page	Details of amendment	Date	Author

## **Volunteer and Re-imburement Policy for Patient, public and carer engagement in patient and public involvement activities**

### **1. Introduction**

A volunteer is anyone who supports the work of Herts Valleys CCG by giving their time, skills and expertise in an unpaid capacity beyond reimbursement of expenses.

Herts Valleys Clinical Commissioning Group encourage and facilitate the maximum possible participation in our work. There is strong evidence that health services are better when people who use them are involved in their design and for effective participation people need to feel supported and know their voluntary contribution is valued and has an impact.

#### **Volunteers may help by:**

- Becoming health and wellbeing ambassadors
- Being part of Herts Valley's Patient and Public Involvement (PPI) Committee which as a committee of the board provides assurance of meaningful participation in the business of the clinical commissioning group from patients, carers, families and members of the public.
- Sharing experiences, as a patient or carer, in the redesign, evaluation or reviewing of particular services, this includes being part of procurement panels, sharing patient stories with the Herts Valleys board and bringing the patient/public perspective to project groups and discussions.
- Joining a locality patient group, and/or other patient involvement initiatives
- Being part of our reader panel which reviews draft material aimed at the public, helping in the development of written information to ensure it is easy to understand, accessible and free from jargon.

#### **Herts Valleys CCG will**

- Provide relevant knowledge, skills and information necessary to undertake and develop any role.
- Provide information about who to contact within the organisation to raise any issues, concerns or questions.
- Provide an environment that is free from any discrimination.
- Provide insurance suitable for the activity. Volunteers will be covered for any activity organised by and agreed with Herts Valleys CCG.
- Provide out of pocket expenses as outlined below.

#### **Volunteers will be asked to:**

- Carry out the tasks in a way that is in keeping with the Herts Valleys CCG values, policies and procedures.
- Respect confidentiality and the sensitivity of any scenario they are dealing with.
- Attend development and support sessions as appropriate.

- Let Herts Valleys CCG know if they cannot take on or complete a role and if there are any problems.

## **2. Recruitment**

We will recruit to our volunteering opportunities using our established communication systems, including social media and aim to broaden participation from within all local communities, taking networking opportunities to raise awareness of the work of the CCG and the volunteer roles available.

## **3. Reimbursement**

Herts Valleys aims to prevent cost becoming a barrier to involvement by providing fair and appropriate reimbursement of out-of-pocket expenses for service users, patients, carers and other members of the public who voluntarily participate in events and activities by invitation.

People acting in their capacity as an official or employee of another organisation will not normally qualify for payment. An individual has the right to choose whether they wish to claim reimbursement for their involvement.

Herts Valleys' policy on the reimbursement of out-of-pocket expenses is for volunteers engaged in agreed patient and public participation activity. It does not cover situations where payment is made for people's time.

The purpose of the reimbursement is to:

- Ensure that people contributing their views on a voluntary basis are not out-of-pocket as a result of their participation.
- Provide clarity on reimbursement so that people can make an informed choice to become involved and participate.
- Agree reimbursement practice with partner organisations for joint events.

Everyone invited by Herts Valleys CCG to participate in involvement opportunities and whose expenses are not paid by another organisation, is entitled to claim expenses. This does not include board, public meetings or other events where there is a general invite and which are open to anyone to attend.

### **Expenses to be reimbursed include:**

- Travel and parking, including alternative transport arrangements when necessary and agreed in advance. Parking costs will be met for the duration of the meeting, but not parking fines.
- Receipted costs for caring arrangements may be paid at an appropriate rate, depending on individual circumstances. These should be discussed in advance with the public engagement manager for agreement by a member of the exec team.
- Interpretation support, signer, personal assistant or advocate costs necessary for participation should be discussed in advance with the public engagement manager for agreement by a member of the exec team.
- Subsistence: if the attendance (including travel) exceeds 5 hours and refreshments are not provided at the venue, receipted expenses for expenses may be claimed. These will cover meals

and non-alcoholic drinks and a guideline price would be a maximum of £10 for lunch or breakfast and £15 for an evening meal.

- Where a patient, carer or service user is asked by the CCG to attend a conference or event then the cost will be reimbursed. This will include reasonable out-of-pocket expenses but rarely accommodation costs. Payment in advance for travel will be made if essential for attendance and receipts must be provided after the event and any unused allowance unpaid. Failure may affect benefit payment. All arrangements will be agreed in advance with the CCG, through the public engagement manager.
- Incidental costs such as printing, postage and telephone calls. In general the person leading the meeting / activity should aim to reduce any cost, for example by providing documents or freepost address. In the event of a claim, receipts should be produced where possible.
- Reimbursement of expenses for those people under 16 years will sit outside of this policy and will be managed on an individual basis.
- It is recognised that in some circumstances people will need a carer/support worker or advocate to accompany them to a meeting. Herts Valleys will reimburse reasonable expenses/costs of these workers if not covered elsewhere (for example via support payments). This to be agreed in advance with a member of the executive team through the public engagement manager.

People are requested to use public transport or the most cost effective, environmentally friendly form of transport where practical.

Where this is not the case, for example due to disability or caring responsibilities or remoteness of venue, then people can claim the volunteer rate. This is currently agreed at 45p per mile for a car or van for the first 10,000 miles and 25p per mile thereafter; 45p per mile for a motorcycle; and 20p per mile for a bicycle. Payment of 5p per mile can be paid to vehicle drivers for carrying passengers.

People are asked to share transport where possible to reduce congestion and cost and volunteers using private transport for authorised journeys should ensure that their insurance covers them to do so.

In the event of exceptional circumstances, the cost of a taxi or special transport arrangements can be met with prior agreement through the public engagement manager.

To claim, an expense form should be completed and sent to the public engagement manager at Herts Valleys CCG, with any receipts, for processing. Claims should be made within a three month period.

Claimants need to be aware that payments may be regarded as income. Visit [www.gov.uk/volunteering/pay-and-expenses](http://www.gov.uk/volunteering/pay-and-expenses) for further advice and information.

The CCG will authorise claims as quickly as possible: however payment will be dependent on process timetables and this may vary.

#### **4. Insurance**

Herts Valleys has insurance policies that will cover volunteers in carrying out their roles. This will not include vehicle insurance.

#### **5. Health and Safety**

Volunteers have a duty to take care of themselves and others who may be affected by their actions and should not act outside of their agreed role. Any incidents should be reported to the public engagement manager.

## **6. Equality and Diversity**

Herts Valleys is committed to offering opportunities for participation and involvement from all communities and backgrounds.