



Experts by Experience Reward and Recognition Policy

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Policy lead	Lead: Recovery, Service User, Carer and Family Experience	
Policy author (if different from above)	Participation and Experience Manager	
Exec Sign off Signature (electronic)		
Disclosable under Freedom of Information Act 2000	Yes	

Policy context

Birmingham and Solihull Mental Health NHS Foundation Trust (BSMHFT) values the experience and expertise of our service users, carers and families. Under the NHS Constitution, they must be offered the opportunity to participate in the planning and delivery of mental health services. BSMHFT must ensure that service users, carers and families who contribute to service developments via our experts by experience (EBE) programme can access reward and recognition for their contributions, including financial payments where appropriate.

Policy requirement (see Section 2)

To have an explicit, fair and flexible policy and procedure that rewards and recognises different types of experts by experience (EBE) participation and activities, extending through a range from free training, payment of travel expenses only for open meetings and information events, hourly rates depending on the type of activity, to market matched rates for highly specialised input.

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Change Record

Date	Version	Author (Name & Role)	Reasons for review / Changes incorporated	Ratifying Committee
Oct 2025	2	Katherine Allen, Lead: Recovery, Service User, Carer and Family Experience	Standard review after 1 year's implementation.	Trust CGC

1: Introduction

1.1.1 Rationale

Birmingham and Solihull Mental Health NHS Foundation Trust (BSMHFT) has duties under the NHS Constitution to provide ways for people to exercise their right to be involved directly in the planning of healthcare services, the development and consideration of proposals for changes in the way those services are provided, and in decisions made affecting the operation of those services.

BSMHFT also needs to demonstrate that it meets the Care Quality Commission (CQC) Well Led Key Line of Enquiry into whether people who use services, those close to them and their representatives are actively engaged and involved in decision making to shape services and culture. There are also numerous quality and ethical reasons for the participation of service users and carers in the services they receive.

BSMHFT takes a collective, rights-based and inclusive approach to ensure that any service user and carer can exercise their right to be involved through its Experts by Experience (EBE) Programme. This is a participatory approach that offers a range of ways for service users and carers to become involved, in a way that they prefer.

1.1.2 Experts by Experience (EBE)

An EBE is anyone who is or has used BSMHFT services* **, or anyone who has cared for someone who has* **, and who becomes involved in the development of services through co-production and other participatory activities. EBE contributors must live in Birmingham and Solihull and/or be registered with a Birmingham and Solihull GP practice, unless they have been recipients of BSMHFT services that support people living outside of this geographical area (for example, speciality services and secure services).

*Appropriate length of time since leaving services will be determined by the type of activity, service requirements, and individual circumstances. This will usually be no more longer than three years except in special circumstances as decided by the activity lead and other EBE contributors where possible.

**It is recognised that being an EBE can contribute to people's recovery and wellbeing through meaningful activity, a sense of identity and informal peer support. We also recognise the high value that EBE contributors provide to BSMHFT. People who are nearing three years since using BSMHFT services will be supported by the participation and experience team through a transition pathway to other opportunities, such as employment support, volunteering, education and the third/community sector.

This policy is required as follows:

- To be explicit about how BSMHFT rewards and recognises the participation of EBE contributors
- To have a fair and flexible policy and procedure that rewards and recognises different types of EBE participation, extending through a range from payment of

travel expenses only for open meetings and information events, free training, hourly rates depending on the activity, to to market matched rates for highly specialised input.

- For EBE contributors to be fully informed of the reward and recognition they will receive in relation to different activities.
- For staff to understand how to reward and recognise service users and carers who participate as an EBE, ensure they plan and budget for EBE contributions effectively and are clear about the expectations of any activity.

1.2 Scope

Service users and carers involved with BSMHFT as an EBE will be informed about what reward, recognition and travel expenses they are entitled to for the time they give to supporting BSMHFT to plan and improve services. BSMHFT staff must use this policy as best practice when involving service users and carers as EBE contributors.

Service users and carers must ensure that they complete all relevant administration as required relative to the EBE activity they are involved in. Colleagues supporting EBE activities must ensure that they send claims into the Finance Department as soon as possible. The Finance Department must process claims within 28 days.

Being an EBE is not the same as being an employee with a contract and should not be seen as sole income to be relied upon. There is no guarantee of hours, as resources, activities and suitability will fluctuate. Being an EBE is the method in which service users and carers can exercise their rights to participate in BSMHFT about decisions that affect them, rather than a job.

People receiving any reward and recognition payments must obtain advice from HMRC and/or The Benefits Agency in line with their individual circumstances to ensure they are compliant with financial law. It may be necessary for people to register with the HMRC to complete a income tax self-assessment. It is not BSMHFT's responsibility to ensure that people are not unlawfully receiving reward and recognition. We cannot offer advice on tax or benefits. We may be able to signpost EBEs to organisations that can advise.

1.3 Principles

BSMHFT values the experience and expertise of our service users, carers and families and must strengthen their voices in the planning and delivery of mental health services. We are committed to having a system to reward and recognise the contributions that service users, carers and families make within the EBE programme that demonstrates the value that we place on their knowledge and experience. This Policy is a demonstration of our Trust Values: compassion in valuing our EBE contributors, including them in developing the services they are affected by, and committing to rewarding and recognising their knowledge and experience.

2. The Policy

To have an explicit, fair and flexible policy and procedure that rewards and recognises different types of EBE participation, extending through a range from payment of travel

expenses only for open meetings, free training, hourly rates depending on type of activity, to market matched consultancy fees. There is also the scope to include other rewards as they become available, such as time credits.

2.1 Aims of the Policy

This policy aims to:

- Set out BSMHFT's practice on when and how to reward EBE contributors for their involvement.
- Set out good practice guidance on how to involve EBE contributors effectively.
- Set out good practice in monitoring the effectiveness of the policy, both from the perspective of the service and EBE contributors.
- Ensure that equality, diversity and inclusion is considered within the EBE programme, and that people with protected characteristics are able to contribute effectively.

3: The Procedure for Reward and Recognition Payments

- Staff identify a requirement for an EBE contributor, or an EBE identifies a requirement which can effectively be sponsored by a staff member
- Staff complete a request form (Appendix B)
- Staff submit a flyer that can be distributed to the EBE database
- Opportunities and the associated level of reward and recognition are circulated to people registered on the EBE database who have completed an expression of interest form (Appendix C)
- EBE contributors submit a specific expression of interest form if required according to the activity
- Interested EBE contributors meet with a staff member to ascertain suitability of the activity to their knowledge, experience and availability
- Following agreed activities, EBE contributors complete a claim form (Appendix D) and submit to the activity lead
- The activity lead completes the budgetary information, ensures appropriate budgetary signature, and submits to the Finance Department
- Claims should be processed as quickly as possible, but certainly no longer than 28 days if they are completed appropriately and approved in the right way

3.1 Levels of Involvement and Reward and Recognition

The policy document '**Reward and Recognition – the Principles and Practice of Service User payment and reimbursement in health and social care**' (Department of Health 2006) outlines five 'levels' of involvement/engagement activity. Based on these principles, BSMHFT has developed the following engagement table:

3.2 Reward and Recognition Rates Experts by Experience Activity (adapted form NHSE Public and Patient Voice Partner Policy)

(NEW INCREASED RATES FINANCIAL AGREEMENT PENDING)

Level 1	Simply informing people of what is planned or has already been decided Offering opinions, listening to feedback, social/informal support events (for example, the recovery for all forum)	Travel expenses	
Level 2			
		Example Activity	Per hour pay rate
Level 3 Deciding together, encouraging additional ideas or options, seeking joint decisions	Level 4 Acting together, not only deciding jointly what to do, but actually doing it together “in partnership”	Taking part in service meetings to plan, develop, or monitor services	£12.21 per hour Plus travel expenses
		Attending committee/sub group meetings	£12.21 per hour plus travel expenses
		Working on a focus group, audit or research project	£12.21 per hour plus travel expenses
		Reading and sending in a written feedback on Trust documents	£12.21 per hour plus travel expenses
		Sitting on interview panels to recruit staff	£12.21 per hour plus travel expenses
		Giving short presentations or talks	£12.21 per hour plus travel expenses
		Taking part in service meetings to plan, develop, or monitor services	£12.21 per hour plus travel expenses
		Attending committee/sub group meetings	£12.21 per hour plus travel expenses
		Working on a focus group, audit or research project	£12.21 per hour plus travel expenses

Level 5 Encouraging independent initiatives. Helping others to do what they want within a framework of advice and support	Co facilitating a training session, using PowerPoint or leading group activity, facilitating larger group discussions	£18.32 per hour plus travel expenses
	Chairing a meeting	£18.32 per hour plus travel expenses
	Presentations	£18.32 per hour plus travel expenses
	Specialist, high level and/or accountable roles	To be advised by project lead

Payments will be paid on an hourly rate basis.

Rates will also be applied to agreed time prior to the event required for reading documents and/or undertaking any form of preparatory work. This must be planned prior to claim form submission. When planning activities, staff must carefully consider the level of preparatory work expected and budget accordingly. However, usual practice would be for preparation and discussion to take place during activities as a collective.

Travelling time to BSMHFT locations will not normally be paid unless by prior agreement, but should be paid when EBE contributors are attending regional or national events. Any reimbursement of out-of-pocket expenses will be provided separately and in addition to the payment.

BSMHFT will offer reward and recognition payments to activities corresponding to levels 3, 4 and 5. Activities corresponding to levels 1 and 2 – informing and consulting – will not normally be paid.

It is the responsibility of the activity lead to determine which level of involvement is required to support the particular activity prior to the request for user and carer engagement and a formal Meeting Pro forma (Appendix B) must be completed for all participation activities that require level 3-5 involvement.

3.3 Other Ways of Receiving of Reward and Recognition

Should an EBE not wish to receive money directly, they can be issued with a voucher. However, this can still be considered as payment in kind. EBEs should check their own personal circumstances regarding tax and benefits.

3.4 Travel Expenses

Travel expenses will be paid either by reimbursing public transport costs, or car mileage rate matching the current staff mileage rate. Mileage claims should not be rounded up.

Taxis are only provided in certain circumstances by prior agreement and booked via BSMHFT. Taxis not agreed prior to the activity will only be reimbursed in extraordinary circumstances when no other options were unexpectedly unavailable.

Taxis may only be used where there is a justification on the grounds of:

- Cost effectiveness due to multiple people travelling to the same place
- Personal safety, for example travelling late at night
 - Disability, impairment or long term condition
- Efficiency, for example meetings held in different parts of a city during the day
 - Travelling with heavy or bulky items of equipment or luggage
- Where it is the only feasible mode of transport.

Travel expenses will not normally be paid to people living outside of the Birmingham and Solihull area. In these circumstances, people will be recommended to become involved with their local healthcare provider. The exception would be when people are recipients of regional services provided by BSMHFT.

3.5 Training

Attendance at EBE training will not be paid, although travel expenses can be claimed. However, there may be exceptional cases when attendance at training is paid at an hourly rate – for example, if an EBE is required to attend a specific, specialist training course.

3.6 Payment at a Higher Level

There may be occasions where BSMHFT would need to pay service users, families or carers at a higher level. This would only apply if the individual had specific and extraordinary expertise, knowledge or skills. In this case, they would be treated in the same way as a self-employed contractor. IR35 and NHSE rules around rates for contractors will apply in these circumstances.

3.7 Service Users and Carers Employed by BSMHFT

Service users or carers who are already in receipt of a salary for the time explicitly spent to use their lived experience would not receive extra payment from BSMHFT for their involvement if it is part of their usual working role. Other employees who are also service users or carers who wish to contribute as an EBE would need to either negotiate their time with their manager, or, if part-time, discuss reward and recognition payments with their manager and consider any impact receiving payment could have on their income to ensure that they are within financial law.

3.8 Non-financial Reward and Recognition

Access to free training, development, pastoral support and peer and professional networking are other ways in which EBE contributors are rewarded and recognised. Also, being an EBE can develop opportunities, self-confidence, skills, experience and knowledge that can transfer to other life areas, including employment.

3.9 Reward and Recognition Waiver

People are able to opt out of receiving reward and recognition should they wish, for example, if it would affect their benefit entitlement.

3.10 Payments: Responsibilities of Experts by Experience

The following points outline the responsibilities of service users and carers when becoming involved in BSMHFT activities as an EBE:

1. Make all necessary arrangements regarding benefit entitlements, including declaring reward and recognition payments as advised by a benefits adviser
3. Register with the HMRC for Tax Self-Assessment if required
4. Make claims for payments in a timely and open manner using the EBE claim form (Appendix D).

Payments. Income and Benefit Claims
We fully recognise that receiving payments can be an issue of concern for those service users and carers who receive benefits. This policy cannot provide advice on how payments will affect benefits as the Department for Work and Pensions (DWP) assesses cases on an individual basis. Therefore, it is the responsibility of individual service users and carers to seek appropriate advice and reconcile their own individual position with regard to benefits. However, where possible BSMHFT will signpost people to the appropriate advice. People receiving other income streams may need to contact the HMRC for advice and to ascertain whether they need to register for Self-Assessment and submit their income details.
Application forms and supporting information for all EBE roles must include information about reimbursement of expenses and if there is a reward and recognition payment. Documentation must also advise individuals in receipt of state benefits to seek advice from the relevant agency, for example JobCentre Plus, ideally in advance of expressing an interest and certainly before claiming reward and recognition
EBE contributors can contact their local JobCentre Plus (National Jobcentre Enquiry Line 0345 604 3719) or Citizens Advice (Consumer Helpline 0345 404 0506)
EBE contributors with questions about tax or NI can contact their local HMRC office (HMRC Helpline 0300 200 3311).
General information and guidance to seek advice regarding benefits and tax requirements will be provided at the EBE induction

3.11 Cancellations

When an activity that an EBE has been booked for is cancelled within 48 hours, full reward

and recognition will be paid. Cancellations prior to 48 hours will not be paid.

3.12 Reasonable Adjustments

BSMHFT have duties under the Equality Act to ensure that reasonable adjustments are in place to enable service users to participate fully as EBE contributors.

At EBE induction, EBE contributors who require reasonable adjustments will be required to complete an Access Plan (appendix 5). A copy of the Access Plan will be held with the participation team and the EBE. EBE contributors must inform the participation and team of any changes to the reasonable adjustments that they need.

4: Responsibilities

Post(s)	Responsibilities	Ref
All Staff	Ensure that EBE activities are planned and supported, including costs and budget identification Send reward and recognition claims to Finance as soon as possible	
Finance Team	Process claims as soon as possible and no later than 28 days after the activity	
Service, Clinical and Corporate Directors	Ensure that EBE activities are planned and supported, including costs budget identification Ensure that EBE activities are adequately resourced (staff capacity and costs for EBE participation)	
Policy Lead	Oversee adherence and effectiveness of policy Monitor and evaluate EBE participation levels including collecting data on the level involvement of people that reflect the diversity of the population BSMHFT serves and across protected characteristics	
Executive Director	Receive assurance of policy adherence	
Experts by Experience	Ensure that reward and recognition payments are declared as appropriate to their personal circumstances (DWP; HMRC). Submit claim forms within 3 months of the activity. Inform the participation and experience team of any reasonable adjustments they require. Attend EBE induction and any further refresher and/or role specific training	

5: Development and Consultation Process

The policy was developed by the Recovery for All Workforce Action Group over a number of meetings, which is a co-production group of staff (including those with lived experience), service users and carers. A significant number of factors were debated and agreed, including the payment rates (following a bench-marking exercise) and the requirement to include recruitment and selection panel reward and recognition hourly payment.

The draft policy was considered and approved in principle by the Executive Management Team (EMT) prior to formal consultation.

The draft policy was also reviewed and refined by the Participation, Experience and Recovery (PEAR) group (including service users and carers) immediately prior to formal consultation. Discussions about the EBE time restrictions following discharge from BSMHFT's services took place before and during the consultation period.

Consultation summary		
Date policy issued for consultation		October 2025
Number of versions produced for consultation		1
Committees / meetings where policy formally discussed		Date(s)
Circulated via email		
Where received	Summary of feedback	Actions / Response
Finance	Clarification on rates, higher rates, guidance on tax and benefits, donations to caring minds, process.	Replaced consultant with specialist activities and contractors. Included reference to IR35 and NHSE rules, removed caring minds donation, added information to vouchers advice, included source for levels, included need to forms completed correctly.
Community transformation team	The policy states throughout that service users, carers (and families) have a right to participate – but makes no mention of age. It talks of equity (rightfully so) but there's no specific mention of children and young people (CYP) and their right to claim. We've had Solar service as part of BSMHFT for years, and yet there's been no formal co-production offer	<p>These questions are too complex to address in the policy within the consultation timeframe and with the individual not being available.</p> <p>The points made require considerable negotiations around the policy, and to reach an agreement will halt policy sign-off.</p> <p>Therefore, the individual concerned will be invited to</p>

	<p>there (I'm developing one) so can CYP – under 18s – claim under this? What about special considerations for under 18's who can't be paid money – can that be claimed by families/carers on their behalf or are vouchers the alternative here – this really need clarifying</p> <p>I'd like more definition of what we mean by an "EBE" – are they a service user/es-SU/carer who is actively participating in co-production work, or are EBEs only defined as those who have completed the BSMHFT EBE programme? This really needs clarifying as it's caused far too much confusion</p> <p>Alternative question – can people claim Reward & Recognition (R&R) if they're not a trained EBE who has gone down the EBE pathway of training?</p> <p>Page 7: "Travelling time to BSMHFT locations will not normally be paid unless by prior agreement" – I thought EBEs could claim for travel expenses to Trust sites, has that now changed 3.4 then talks about travel expenses</p> <p>Page 7 re: vouchers – needs explaining how this works, what vouchers, where can they be spent, is it the same or different claim form, what's our internal process – i.e. who makes the voucher</p>	<p>work through some of these concerns when they have returned to work, and minor amendments will be agreed and presented to PDMG.</p>
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	<p>payment?</p> <p>Page 7 3.4 – Trust transport taxis have proven to be extremely unreliable in the past. I've escalated this and problems remain – what's the process, how is this done probably needs to be explained</p> <p>Page 8 3.7 – my impression was that staff members can't be classed as EBEs – again, a clearer definition of what we mean by an EBE</p> <p>I personally don't agree with 3.11 – I feel this doesn't allow for cancellations that happen unexpectedly and last minute – which do happen as a result of sickness or emergencies, and these can't be helped. If we're saying that being an EBE isn't the same as being employed, then it's strange that we'll pay for someone's time when they've not done something, almost as if they're an employee</p> <p>Page 10 re: reasonable adjustments – how is that information shared with staff who are working with EBEs? EBEs will need to consent to this, and reasonable adjustments can only be considered if that information is shared. Also, if an adjustment can't be provided for whatever reason, can staff refuse an EBE?</p> <p>Page 10: "Attend EBE induction" – by this definition then does it mean only EBEs who have</p>	
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	attended this induction can claim? Also, what's meant by induction – is the same as the EBE training?	
Experts by experience	Clarity on rounding up hours. Clarity on claiming travel.	Amendments made: Have removed rounding up from hourly rate, and have specified no rounding up of mileage.

6: Reference Documents

None

7: Bibliography

None

8: Glossary

None

9: Audit and Assurance

Element to be monitored	Lead	Tool	Frequency	Reporting Committee
Number of EBE activity hours paid	Participation and Experience Leads	Pro-formas (Appendix B)	Quarterly	Clinical Governance Committee
EBE Equality, diversity and inclusion monitoring.	Policy lead	Expression of Interest forms	Yearly	PEAR group Clinical Governance Committee
Payment timeframes	Policy lead	Activity records. Financial records.	6 monthly	PEAR group Finance Team

Appendix 1: Equality Analysis Screening Form

A word version of this document can be found on the HR support pages on Connect

<http://connect/corporate/humanresources/managementsupport/Pages/default.aspx>

Title of Proposal	Experts by Experience Reward and Recognition Policy		
Person Completing this proposal	Katherine Allen	Role or title	Lead: recovery, service user, family and carer experience
Division	Participation and Experience	Service Area	Trust-wide
Date Started	October 2025	Date completed	October 2025
Main purpose and aims of the proposal and how it fits in with the wider strategic aims and objectives of the organisation.			
To ensure fair reward and recognition for Experts by Experience (EBE) and the work they contribute to the Trust.			
Who will benefit from the proposal?			
Experts by Experience (service users, families and carers) will benefit as will Trust colleagues by working with EBEs. The Trust as an organisation will benefit from having EBEs contribute in a meaningful way that is recognised which in turn will impact on service delivery and experience.			
Do the proposals affect service users, employees or the wider community? Add any data you have on the groups affected split by Protected characteristic in the boxes below. Highlight how you have used the data to reduce any noted inequalities going forward			
The proposal will have a positive impact on service users, families and carers and Trust staff. The introduction of a reasonable adjustments plan for experts by experience is an improvement in making the EBE programme accessible.			
Do the proposals significantly affect service delivery, business processes or policy? How will these reduce inequality?			
This will have a financial implication for the Trust.			
Does it involve a significant commitment of resources?			

How will these reduce inequality?				
This will involve a financial commitment from the Trust.				
Do the proposals relate to an area where there are known inequalities? (e.g. seclusion, accessibility, recruitment & progression)				
All service users, families and carers are eligible to become EBEs and to receive training to enable them to use their lived experiences to support Trust projects, initiatives and recruitment. This is a Trust-wide policy that is applicable and open to all service users, families and carers.				
Impacts on different Personal Protected Characteristics – Helpful Questions:				
<i>Does this proposal promote equality of opportunity?</i> <i>Eliminate discrimination?</i> <i>Eliminate harassment?</i> <i>Eliminate victimisation?</i>			<i>Promote good community relations?</i> <i>Promote positive attitudes towards disabled people?</i> <i>Consider more favourable treatment of disabled people?</i> <i>Promote involvement and consultation?</i> <i>Protect and promote human rights?</i>	
Please click in the relevant impact box or leave blank if you feel there is no particular impact.				
Personal Protected Characteristic	No/Minimum Impact	Negative Impact	Positive Impact	Please list details or evidence of why there might be a positive, negative or no impact on protected characteristics.
Age			Yes	All EBE activity will be rewarded and recognised equitably
Including children and people over 65 Is it easy for someone of any age to find out about your service or access your proposal? Are you able to justify the legal or lawful reasons when your service excludes certain age groups				
Disability			Yes	All EBE activity will be rewarded and recognised equitably
Including those with physical or sensory impairments, those with learning disabilities and those with mental health issues Do you currently monitor who has a disability so that you know how well your service is being used by people with a disability? Are you making reasonable adjustment to meet the needs of the staff, service users, carers and families?				
Gender			Yes	All EBE activity will be rewarded and recognised equitably.

				It is anticipated that gender will not have a negative impact in terms of discrimination, as this policy ensures all EBEs are treated in a fair, reasonable and consistence manner, irrespective of their gender identity.
This can include male and female or someone who has completed the gender reassignment process from one sex to another Do you have flexible working arrangements for either sex? Is it easier for either men or women to access your proposal?				
Marriage or Civil Partnerships			Yes	All EBE activity will be rewarded and recognised equitably. It is anticipated that marriage or civil partnerships will not have a negative impact in terms of discrimination, as this policy ensures all EBEs are treated in a fair, reasonable and consistence manner, irrespective of their marital status.
People who are in a Civil Partnerships must be treated equally to married couples on a wide range of legal matters Are the documents and information provided for your service reflecting the appropriate terminology for marriage and civil partnerships?				
Pregnancy or Maternity			Yes	All EBE activity will be rewarded and recognised equitably. It is anticipated that pregnancy or maternity will not have a negative impact in terms of discrimination, as this policy ensures all EBEs are treated in a fair, reasonable and consistence manner.
This includes women having a baby and women just after they have had a baby Does your service accommodate the needs of expectant and post natal mothers both as staff and service users? Can your service treat staff and patients with dignity and respect relation in to pregnancy and maternity?				
Race or Ethnicity		Yes		All EBE activity will be rewarded and recognised equitably.
Including Gypsy or Roma people, Irish people, those of mixed heritage, asylum seekers and refugees What training does staff have to respond to the cultural needs of different ethnic groups? What arrangements are in place to communicate with people who do not have English as a first language?				
Religion or Belief			Yes	All EBE activity will be rewarded and recognised equitably.
Including humanists and non-believers Is there easy access to a prayer or quiet room to your service delivery area?				

When organising events – Do you take necessary steps to make sure that spiritual requirements are met?				
Sexual Orientation			Yes	<p>All EBE activity will be rewarded and recognised equitably.</p> <p>It is anticipated that sexual orientation will not have a negative impact in terms of discrimination, as this policy ensures all EBEs are treated in a fair, reasonable and consistence manner, irrespective of sexual orientation.</p>
<p>Including gay men, lesbians and bisexual people</p> <p>Does your service use visual images that could be people from any background or are the images mainly heterosexual couples?</p> <p>Does staff in your workplace feel comfortable about being 'out' or would office culture make them feel this might not be a good idea?</p>				
Transgender or Gender Reassignment			Yes	<p>All EBE activity will be rewarded and recognised equitably.</p> <p>It is anticipated that transgender or gender reassignment will not have a negative impact in terms of discrimination, as this policy ensures all EBEs are treated in a fair, reasonable and consistence manner, irrespective of gender.</p>
<p>This will include people who are in the process of or in a care pathway changing from one gender to another</p> <p>Have you considered the possible needs of transgender staff and service users in the development of your proposal or service?</p>				
Human Rights			Yes	All EBE activity will be rewarded and recognised equitably.
<p>Affecting someone's right to Life, Dignity and Respect?</p> <p>Caring for other people or protecting them from danger?</p> <p>The detention of an individual inadvertently or placing someone in a humiliating situation or position?</p>				
<p>If a negative or disproportionate impact has been identified in any of the key areas would this difference be illegal / unlawful? I.e. Would it be discriminatory under anti-discrimination legislation. (The Equality Act 2010, Human Rights Act 1998)</p>				
	Yes	No		
	High Impact	Medium Impact	Low Impact	No Impact

What do you consider the level of negative impact to be?			Low	
<p>If the impact could be discriminatory in law, please contact the Equality and Diversity Lead immediately to determine the next course of action. If the negative impact is high a Full Equality Analysis will be required.</p> <p>If you are unsure how to answer the above questions, or if you have assessed the impact as medium, please seek further guidance from the Equality and Diversity Lead before proceeding.</p> <p>If the proposal does not have a negative impact or the impact is considered low, reasonable or justifiable, then please complete the rest of the form below with any required redial actions, and forward to the Equality and Diversity Lead.</p>				
Action Planning:				
How could you minimise or remove any negative impact identified even if this is of low significance?				
If negative impacts are identified, this would be escalated to EDI and to Head AHPs / Associate Director.				
How will any impact or planned actions be monitored and reviewed?				
Feedback of concerns will be escalated through governance route.				
How will you promote equal opportunity and advance equality by sharing good practice to have a positive impact other people as a result of their personal protected characteristic.				
N/A				
<p>Please save and keep one copy and then send a copy with a copy of the proposal to the Senior Equality and Diversity Lead at bsmhft.hr@nhs.net The results will then be published on the Trust's website. Please ensure that any resulting actions are incorporated into Divisional or Service planning and monitored on a regular basis</p>				



Appendix 2: Expert By Experience Pro-Forma (to be completed by activity lead, co-produced with an expert by experience when they have initiated the activity)

Activity title:		
Activity Lead:	Who is the chair or lead?	
Activity Organiser	Who is actually organising the admin of the meeting?	
Time Commitments:	How long does the meeting last? What time of day? Meeting Frequency?	
Where will the activity take place?		
How will the meeting be funded?	Whose budget is being used? Have you got authorisation?	
Payment:	How will service users and carers be paid? What amount?	
Other payments i.e. translator		
Length of Activity:	e.g. 6 months to be reviewed	

Recruitment materials

Please attach a recruitment flyer, email or link, including contact details.
Guidelines can be found on the communications Connect link [Communications and Marketing - Communications And Marketing](#)



compassionate



inclusive



committed

Appendix 3: Expert by Experience Interest Form (to be completed by service users/families/carers)

Name	
Contact details	
Time commitments I can offer	
Areas in Birmingham & Solihull I can travel to	
Trust areas you prefer to work at	
Trust areas you prefer not to work at	
Type of involvement you prefer	
Knowledge and Experience	
How long would you like to commit to being an EBE?	
What do you hope to get from being an EBE?	
Do you have any special requirements that we need to meet?	

Equality, Diversity and Inclusion Monitoring

Optional Information about you: Please tick the relevant categories below which best describe you	
Age Range	<div>< 20 <input type="checkbox"/></div> <div>20 – 29 <input type="checkbox"/></div> <div>30 – 39 <input type="checkbox"/></div> <div>40 – 49 <input type="checkbox"/></div> <div>50 - 59 <input type="checkbox"/></div> <div>60 - 64 <input type="checkbox"/></div> <div>> 65 <input type="checkbox"/></div>
Disability	<div>No <input type="checkbox"/></div> <div>Not Declared/Undefined <input type="checkbox"/></div> <div>Yes <input type="checkbox"/></div>
Religion & Belief	<div>Atheism <input type="checkbox"/></div> <div>Buddhism <input type="checkbox"/></div> <div>Christianity <input type="checkbox"/></div> <div>Hinduism <input type="checkbox"/></div> <div>Islam <input type="checkbox"/></div> <div>Jainism <input type="checkbox"/></div> <div>Other <input type="checkbox"/></div> <div>Sikhism <input type="checkbox"/></div> <div>I do not wish to disclose my religion/belief <input type="checkbox"/></div> <div>Not declared/Undefined <input type="checkbox"/></div>
Gender	<div>Female <input type="checkbox"/></div> <div>Male <input type="checkbox"/></div>
Sexual Orientation	<div>Bisexual <input type="checkbox"/></div> <div>Lesbian <input type="checkbox"/></div> <div>I do not wish to disclose <input type="checkbox"/></div> <div>Undisclosed <input type="checkbox"/></div> <div>Gay <input type="checkbox"/></div> <div>Heterosexual <input type="checkbox"/></div>
<u>Ethnicity</u> Asian or British Asian	<div>Bangladeshi <input type="checkbox"/></div> <div>Other Asian <input type="checkbox"/></div> <div>Indian <input type="checkbox"/></div> <div>Pakistani <input type="checkbox"/></div>
Black or Black British	<div>Black African <input type="checkbox"/></div> <div>Other Black <input type="checkbox"/></div> <div>Black Caribbean <input type="checkbox"/></div>
Chinese	<div>Chinese <input type="checkbox"/></div>
Mixed	<div>Other Mixed <input type="checkbox"/></div> <div>White & Asian <input type="checkbox"/></div> <div>White & Black Caribbean <input type="checkbox"/></div> <div>White & Black African <input type="checkbox"/></div>
Other Ethnic Group	<div>Other Ethnic Group <input type="checkbox"/></div>

<i>Undefined</i>	<i>Not Stated</i> <input type="checkbox"/>		
<i>White</i>	<i>British</i> <input type="checkbox"/>	<i>Gypsy or Irish</i> <input type="checkbox"/>	
	<i>Irish</i> <input type="checkbox"/>	<i>Other White</i> <input type="checkbox"/>	

Appendix 4

CLAIM FOR EXPERT BY EXPERIENCE (USER / CARER) REWARD & RECOGNITION PAYMENT

ALL SECTIONS MUST BE COMPLETED

Name (print)	
Home Address	
Email address (for confirmation of payment)	
National Insurance Number (this information is required because of statutory services accounting regulations)	

BANK ACCOUNT DETAILS

Name of Bank	
Address of Bank	
Name of Account Holder	
Account Number	
Sort Code	

Participation & Engagement Information

Date	Venue	Meeting/Interview Title	Hours From/To	Total to be paid
TRAVEL EXPENSES CAN ONLY BE CLAIMED FOR IF IT HAS BEEN AGREED IN ADVANCE WITH THE ORGANISER OF THE MEETING				
Daysaver / local bus, train or tram fare				
Taxi (only by prior agreement/ agreed need)				

Car: _____ miles (at 45p per mile)	
TOTAL CLAIM	£

Please note, the Trust cannot take responsibility for individual's personal situations regarding what you can earn if you are on any benefits such as income support, ESA or Universal Credit.

This claim is a true record of my fee entitlement for participation in this meeting/event. I understand that accepting the payment of a fee may affect my Benefits and/or Income Tax status and I undertake to declare this income to the relevant Statutory Authority.

Service user or carer's signature.....

Date

OFFICE USE ONLY

Authorised by Budget holder:(print name)

Signed:.....

Date:.....

Budget code:.....

RECEIPT OF REWARD & RECOGNITION PAYMENT

This section to be kept by Expert By Experience (service user or carer) for their records.

Payments to Experts By Experience (service users and carers)

1. In line with the guidance in the Experts by Experience Reward and Recognition Policy (August 2023) service users or carers (i.e. not paid worker engagement staff or peer support workers) who have attended the training to become an EBE and engaged in contributing to meetings, training or consultations will be offered a pre agreed payment for their time and expertise.
2. It is up to you whether you accept or waive this payment. If you waive this payment you can still be reimbursed for reasonable out-of-pocket expenses (travel/ subsistence) we can reimburse travel costs where we ask you to travel to a location for work or care within our Trust.
3. You are advised that ANY payment for your participation may be considered earnings by the Department for Work and Pensions (DWP) and might affect your entitlement to welfare benefits.
4. The Trust cannot take responsibility for individual's personal situations regarding what you can earn if you are on any benefits such as income support, ESA or Universal Credit. We can provide you with external agencies who may be able to provide you with information
5. Birmingham and Solihull Mental Health NHS Foundation Trust is required to give accurate details of any payments made to you if asked to do so by the DWP or Inland Revenue.
6. It is the responsibility of individual Experts by Experience to keep a record of any paid work that they have completed for BSMHFT in order for any discrepancies to be quickly resolved.

DATE

AMOUNT TO BE PAID

BUDGET HOLDER NAME & CONTACT NUMBER

.....

BSMHFT Finance Team will endeavour to ensure payments reach your bank account within 28 days. You will receive a confirmation of payment by email.

Appendix 5: Experts by Experience Reasonable Adjustments Access Plan

Expert by experience (EBE).....

Staff member.....

Date.....

Review date.....

1.	Conditions
2.	

3.	What do we need to know about how your condition affects you?
4.	

5.	What reasonable adjustments do you need to be an EBE?
6.	

7.	What activities do you require reasonable adjustments for?
8.	All face to face activities.

Signed

Experts by experience

Signed

Staff member

Guidance Notes

Review date – minimum and can be requested at any stage.

Confidentiality – who is this going to be shared with.

Participation and experience team and colleagues on a need to know basis.

Panels – chair only.

Not attached to clinical notes

Document is protected