



Adults' Health and Care Directorate Policy	[03/24 v3]
Resident Involvement Expenses and Allowances Policy	
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Summary	This document provides guidance on expenses and allowances that may be claimed by external individuals participating in the Directorate's work.
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Resident Involvement Expenses and Allowances Policy

<p>transfer</p> <ul style="list-style-type: none">• Addition of 13.9 details the remittance advice and how to cross reference the co-production payment• Addition of 15.4 Bribery Act 2010• Removal of accommodation, subsistence and office supplies	

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Please ensure:

If you require a copy of this policy in another language or format (such as audio, large print, or Braille), please contact: ahc.policy@hants.gov.uk

1. Purpose

- 1.1** This policy seeks to enable broad participation across people who use services, unpaid carers and members of the public in the work of the Adults' Health and Care by removing financial barriers to participation and incentivising involvement. The policy provides clarity on the types of expenses that can be claimed for, such as travel. It also introduces three distinct hourly rates ranging from £12 - £23 per hour, which are aligned with three levels of contribution from service users or carers. The three levels reflect the varying degrees of involvement and skill and/or specialist knowledge needed.
- 1.2** It is important to recognise that the payments could affect the amount of tax an individual must pay and could impact on benefits, such as Universal Credit. It is recommended that individuals seek advice on these issues if they believe they could be affected.
- 1.3** This policy underpins the Adults' Health and Care approach to co-production, more details of which are available at: [Let's go co-pro | Health and social care | Hampshire County Council \(hants.gov.uk\)](https://www.hants.gov.uk/lets-go-co-pro-health-and-social-care)

2. Introduction

- 2.1** A key value within the County Council's Serving Hampshire [Strategic Plan](#) is to 'put people at the forefront of what we do and help communities across the county to thrive, [because] we care.' This can be achieved by engaging, informing and involving residents. This commitment is also reflected in the Adults' Health and Care [Strategy](#), which promotes the engagement and involvement of service users, families and carers through co-production to support service development and continuous improvement. The Care Act 2014 specifically includes the concept of co-production in [its statutory guidance](#). The guidance defines co-production and suggests that it should be a key part of implementing the Care Act.
- 2.2** The Directorate involves residents in various ways including, for example, asking people to co-produce policies and services with us, seeking people's views through participating in service design workshops, and asking for service user representatives to be part of our governance, assurance and recruitment processes. The Directorate aims to encourage broad participation from across Hampshire's communities in its work. To this end, we recognise the need to remove, or minimise, financial barriers that can prevent or discourage participation.
- 2.3** We do this through offering 'expenses' and 'involvement allowances':
- **Expenses** – People should not be left 'out of pocket' as a result of their involvement. Therefore, the Directorate will cover legitimate costs incurred as a result of participation, for example travel.
 - **Involvement allowances** – The Directorate offers payment to those who

contribute their experience and expertise. In addition, the Directorate offers non-financial means of recognition and thanks for an individual's contribution.

3. Scope

- 3.1** This policy applies to individuals who use Adults' Health and Care services, carers, family members and wider residents engaged in the Directorate's work.
- 3.2** It does not apply to business with organisations such as Voluntary and Community Sector groups. Neither does it apply to employees of the County Council or other people working with the Directorate, such as contractors or those occupying consultancy roles.
- 3.3** On occasion, the Directorate may commission engagement activities, or work in partnership with external organisations to enable particular groups to participate. This activity falls outside the scope of this policy and would be procured separately, in line with the County Council's Standing Orders and procurement law.
- 3.4** People who are involved in County Council events but are doing so as the participant of another agency, are not covered under the scope of this policy and should refer to the reimbursement arrangements of the body they are covered by.
- 3.5** People who choose to respond to an open engagement, for example an online survey that anyone could respond to, also cannot claim expenses or allowances under this policy.

4. Duties, Responsibilities, Roles

Role / function	Responsible for:
Lead Officer	<ul style="list-style-type: none">• Ensuring that all participants involved in engagement and co-production with the Directorate are made aware of this policy and how to claim.• Ensuring any required payments are considered as part of the project business case and appropriate sign-off is obtained prior to project commencement.• Receiving, verifying, ensuring approval for, processing and securely storing claims.• Supporting the prompt payment of allowances, including by ensuring approved vendor / supplier numbers are maintained.• Responding to queries or concerns raised by the claimant.• Providing information as appropriate to support audits or legitimate requests from other agencies, such as the Department for Work and Pensions.

Managers	<ul style="list-style-type: none"> • Ensuring staff are aware of this policy and how it relates to their roles. • Ensuring Lead Officers are identified for each project or initiative with user involvement. • Providing appropriate sign-off of, and access to, funds required to pay expenses and allowances for involvement activity. • Supporting the prompt payment of allocates, including by providing timely sign-off of claims where required.
Care Governance and Quality Assurance function	<ul style="list-style-type: none"> • Supporting the implementation of this policy. • Providing advice on the practical application of the policy where necessary.

5. Definitions

5.1 People who use services / service users – Any adults aged 18 or over with support or care needs. This includes both people who have eligible care needs as defined under the Care Act 2014, as well as people who may access lower levels of support. This also reflects the need to involve a broad range of people in the development of our services, for example, prevention and early intervention services.

5.2 Carer – An unpaid person providing practical or emotional support to someone else, who may be a parent, partner, other relative, friend or neighbour.

5.3 Expense – Costs incurred by individuals from participating in involvement activity.

5.4 Allowance – The maximum financial contribution that the Directorate offers for a specific piece of work. This can be negotiated down at the request of the service user or carer to remain within ‘permitted work’, ‘earnings disregard’ or ‘work allowances’ regulations stipulated by benefits agencies. The person to whom the allowance is offered is responsible for deciding to accept the allowance, negotiate a lower amount, or decline the allowance altogether.

5.5 Co-Production – Professionals and citizens sharing power to plan, design and deliver support together. It’s about recognising that everyone has an important contribution to make to improve quality of life for people and communities. It is built on the principle that those who use a service are best placed to help design it.

5.6 Expertise – This is the specialist knowledge and expertise that people with lived experience gain through their experiences, which sits alongside the learned experience and specialist skills that professionals have.

5.7 Recognition – This is the way in which we demonstrate that we value and appreciate the involvement of those taking part.

6. Principles

6.1 When paying expenses and offering allowances to people who are participating in the Directorate's work through user involvement, we will:

- Be open and transparent about this policy will be applied to specific projects and initiatives.
- Provide a named Lead Officer for each project who can be contacted about payments, so that any issues can be resolved in a timely way.
- Reimburse expenses and make payments in a timely manner, recognising that late payment can impact negatively on people's financial circumstances*.
- Show appreciation in non-financial ways, recognising that not everyone will be able to accept financial recognition due to their personal situation.
- Offer best value for public funds by covering expenses in a way that is fair and cost effective.

*The Directorate will endeavour to pay expenses within 28 days of receiving a valid claim. The 28-day timeframe does not include any additional time required to establish individuals as suppliers on Hampshire County Council systems, or any time needed to substantiate a claim.

7. Payment of Allowances

7.1 The Directorate will offer involvement allowances in return for people's participation and involvement activity in line with the following expectations:

- The offer of an allowance is made in return for that person's specific and unique experience of care or support needs, or their experience of providing unpaid or informal care.
- The person receiving an allowance is expected to actively contribute as evidenced, for example, through output or records in meeting minutes.
- Allowances will not be offered if, for any reason, the person is no longer able to participate in the activity.
- The offer of an allowance is made on a one-off or time limited basis dependent on the nature of the activity – for example, attending an interview panel; attending three meetings lasting two hours each over a six-month period; representing service users at quarterly meetings for a two-year period. This should be agreed by the Lead Officer and participant in advance of the activity commencing.

- There is no guarantee of further allowances being offered for other activity.
- The person accepting an allowance accepts the responsibility to inform any relevant tax or benefit agency as to the amount earned. In some cases, where service users do not have capacity to manage financial affairs but do have the capacity to participate, it may be necessary to involve additional parties, such as advocacy or someone with power of attorney, to ensure this expectation can be met.
- The Directorate is legally obliged to retain records of who has received an allowance, and the Directorate must share these details with Her Majesty's Revenue and Customs service or the Department for Work and Pensions if requested to do so.
- Claims are made within three months of the activity being undertaken, and preferably within one month.

7.2 The Directorate will not offer an allowance where:

- The purpose of the involvement is primarily therapeutic – for example, counselling, assessment of needs, peer support activity, safeguarding investigation or follow up to a complaint.
- The person claiming an allowance is already attending in a paid capacity on behalf of an external organisation

7.3 As a general principle, any offer of an allowance should not equate to below minimum wage, or National Living Wage if the individual is over the age of 23. However, a lower allowance may be agreed to suit the circumstances of the service user or carer. Minimum wage entitlements are available on the [minimum wage gov.uk webpages](#).

8. Tax, National Insurance, State Benefit and Health Premium implications

8.1 For some people who use services, and carers receiving an allowance in return for their participation, it may impact on their benefit entitlements. For example, for benefits such as Universal Credit there are specific defined limits to work allowances. More information is available on the [universal credit gov.uk webpages](#).

8.2 Individual circumstances will differ, therefore it is important that anyone receiving an allowance seeks independent advice prior to accepting an allowance. It remains the responsibility of the individual receiving an allowance to declare this to the relevant agency.

8.3 Individuals may wish to refer to the Social Care Institute of Excellence (SCIE) [guidance page paying people who receive benefits](#) for further information on how

this can affect their benefits, which includes examples and letter templates. The Directorate will provide letters as required to evidence service user involvement.

- 8.4** For tax purposes, reimbursement of expenses is not considered to be earned income, whereas an involvement payment would be. Although in most cases, the total earned annually is unlikely to exceed the personal tax allowance, any person receiving an allowance should seek advice from HMRC to address any concerns relating to tax.
- 8.5** Where the individual participant is self-employed, it is their responsibility to declare receipt of any involvement payment(s) as part of their tax return, and in their relevant record / documentation, including alerting HMRC as appropriate.

9. Alternative methods of allowance

- 9.1** Recognition can take many forms and may evolve with the relationships built among work programs, teams, and individuals with diverse lived experiences. This policy should not be seen as a 'one size fits all' solution; rather, it should guide us in acknowledging the contributions of those who engage, participate, and collaborate in co-production and co-design efforts.
- 9.2** All involvement activity is voluntary, there is no obligation, at any time, for the participant to carry out the activity. If a payment or an alternative method to payment is offered, it is the participant's decision whether to accept it. Just like with financial payments, participants may opt for a lesser amount.
- 9.3** Upon request the Directorate will provide a letter of recognition to evidence involvement. This should be produced and provided by the Lead Officer and should detail the involvement and recognition on headed paper, including the length of work and details of the project.
- 9.4** Hampshire County Council is committed to enhancing personal development by encouraging individuals to explore their unique interests. We recognise the value of engaging those with lived experience in various projects, and we will actively seek to uncover additional interests and provide opportunities, as an alternative to traditional payment.

10. Setting of allowances for working meetings

10.1 The rates of involvement allowances are set to reflect the different level of involvement and skill and/or specialist knowledge needed as follows:

Expected Contribution from Service User or Carer	Allowance	
Level one: Engagement	£12.21 per hour	Appendix 1 provides further details of what is expected.
Level two: Co-production	£18 per hour	Appendix 1 provides further details of what is expected.
Level three: Strategic Co-production (interviews, chairing)	£23 per hour	Appendix 1 provides further details of what is expected.

10.2 The Lead Officer will clearly establish the individual's level from the outset, with each project's requirements being assessed against the Co-Production Participation Levels (appendix 1). The three levels reflect the varying degrees of involvement and skill and/or specialist knowledge needed.

10.3 The allowance can be negotiated down at the request of the service user or carer to remain within 'permitted work', 'earnings disregard' or 'work allowances' regulations stipulated by benefits agencies. The person to whom the allowance is offered is responsible for deciding to accept the allowance, negotiate a lower amount, or decline the allowance altogether.

10.4 Examples of activities and allowances

- a) A working group of carers is set up to review the assessment process for carers. Individuals are invited to comment on the assessment template and whether it covers all the relevant needs. The carers are invited to contribute their own personal views on the assessment template and whether it captures their own personal needs. The meeting lasts two hours. This is classed as a level one activity as the involvement does not constitute co-production and the views are largely personal, rather than representative. As such, a £12.21 allowance per hour, per person is agreed. Each participant receives £24.42

per meeting.

- b) A Task and Finish group is established to co-produce the content of marketing and communication materials to support a new digital campaign. The group agrees to meet for one hour a month for three months. This is classed as a level two activity as involves co-production (working together on a jointly owned campaign) and not just engagement (being asked for views on an Adults' Health and Care-led campaign). A total of £54 is agreed for the duration of the project (£18 per hour meeting per month for three months).
- c) A half day training session for newly qualified social workers is taking place. A service user is invited to co-facilitate the session, lead a workshop discussion and feedback to the learning and development team. The session lasts four hours and requires some time before and after the session to prepare and consolidate. This is classed as a level three activity as it requires specialist skills in facilitation and is a form of co-production, with the service user engaging as an equal partner. As such, it is agreed that the service user should receive £23 per hour, totalling £92 for the four-hour session.
- d) A service user conducts five interviews with residents in an extra-care setting. Each session lasts an hour. The service user then requests to be paid £50 by Adults' Health and Care. No allowance is offered as the activity was not undertaken at the request of the Directorate.

11. Preparation

- 11.1** It is expected that preparation time prior to activities will be kept to a minimum, and work should take place within the session. Participants are permitted up to one hour for preparation; any additional time required must be approved by the Lead Officer. Follow-up actions will be undertaken on a voluntary basis.
- 11.2** If circumstances arise where additional preparation time is needed, or the follow-up work required is considered significant, it must be discussed and agreed with the Lead Officer in advance.
- 11.3** Examples of preparation time:
 - a) Minimum reading before the meeting to understand the content.
 - b) Creating a mood board.
 - c) A focus group is given questions to reflect ahead of the meeting.

12. Payment of expenses

- 12.1** Adults' Health and Care will reimburse all reasonable expenses in line with this policy and the rates detailed above. Receipts are required for all expenses throughout the policy document.
- 12.2** Incurred costs will be met where meetings or events are cancelled at short notice and arrangements cannot be withdrawn without penalty. For example, an individual arranges and pays for a carer to provide support to a family member,

releasing them to attend an online workshop. The workshop is cancelled in the morning due to low attendance and the individual cannot rearrange the care or request for the carer's costs to be refunded. In this scenario, the individual would be able to claim the expense of the carer but would not be permitted to claim an allowance for their contribution to the meeting which did not take place.

12.3 There may be instances where costs of participation are a barrier to involvement in ways not covered by this policy. In such situations, participants should be encouraged to discuss their needs with the Lead Officer so that solutions can be explored, and any support agreed on a case-by-case basis.

Travel expenses

12.4 This policy is intended to support Hampshire County Council's commitment to achieving carbon neutrality by 2050. In support of this aim, it is expected that virtual platforms will be maximised to reduce the need for travel as far as it practical and appropriate to the specific engagement.

12.5 Travel costs will not be reimbursed if the person would usually expect to be in attendance on that date at that time, for example, attending a community group that the individual is routinely part of.

12.6 Where travel is necessary, participants should use public transport where practical, safe, and reasonable to do so. When travelling by rail, good use should be made of off peak and advance fare discounts and consideration given to the most cost-effective route. Standard class should be used unless there is a justifiable reason for first class travel, for example due to accessibility, medical or health need. This should be agreed with the Office Lead in advance.

12.7 Private vehicles may be used where this is considered the most appropriate form of transport. The rate of reimbursement is as follows:

Vehicle	Basis of rate	Per business mile
Cars and vans	HMRC rate	45 pence
Motorcycles	HMRC rate	24 pence
Bicycles and electric bicycles	EHCC approved rate	10.5 pence
Passenger rate	EHCC approved rate	5 pence (irrespective of number of passengers carried)

12.8 Individuals are personally liable for any excess parking penalties, charges or fines issued to them and Adults' Health and Care will not refund these changes.

12.9 The vehicle for which mileage is claimed should be insured and maintained in a road-worthy condition, in line with the requirement of the Road Traffic Acts. The individual must hold a valid driving licence.

12.10 Use of taxis should be agreed in advance and only where there is a justification on the ground of:

- Cost effectiveness – meaning multiple people travelling to the same place;
- Personal safety – meaning travel at night;
- Disability, impairment or long-term condition;
- Efficiency – meaning attendance at different parts of the county throughout the day; and
- Practicality – meaning where it is the only feasible mode of transport.

Personal assistants, support workers, facilitators, communicators, and carers

12.11 The County Council recognises that in some circumstances, individuals may need to arrange for carers or support workers to accompany them to a meeting, or to take over caring responsibilities to enable their participation (including childcare or care for a family member with a disability or other additional needs).

12.12 Reimbursement of costs for a carer, support worker, personal assistant, advocate or other professional providing support, will be considered on a case-by-case basis and must be agreed between the participant and the Lead Officer in advance of the activity.

12.13 Adults' Health and Care will consider meeting the reasonable costs incurred for support workers, including facilitators and communicators, and carers engaged by the individual to enable their participation. As levels of support can vary considerably depending on individuals' needs, there is no set rate for these costs. Actual costs incurred will be reimbursed on presentation of receipts or other evidence of expenditure, such as an invoice. These should detail the registration of the person providing support, or the professional organisation providing care.

12.14 The Directorate will not pay for the provision of care by a non-registered / non-professional or 'informal' carers, such as a family member or neighbour, but will meet their travel expenses in addition to the participant's own expenses.

12.15 Costs will only be reimbursed where they are not already being met through another means funded by the County Council- for example, as part of a care package or direct payment arrangement.

12.16 In line with the above guidance, Lead Officers should consider meeting the following costs:

- The hourly rate of the carer / support worker to accompany and support the participant at a meeting or event. This includes hourly rate costs for travel time to and from a meeting or event (if appropriate).
- Expenses incurred by the carer /support worker in assisting the participant to travel to and from, and to attend, a meeting or event. Costs would be reimbursed back to the participant and not to the carer / support worker directly.
- The hourly rate cost for a carer(s) to cover caring responsibilities whilst the participant is travelling to and from, and attending, a meeting or event. This includes care for a family member, disabled child or other dependent person with care needs.
- Expenses incurred by an 'informal' / nonprofessional / non-registered carer, such as a family member, to accompany a participant to and from, and at, a meeting or event.

Equipment

12.17 The County Council recognises that not everyone will have a personal computer to use, access to a computer can be found at local libraries or alternatively the Officer Lead should make reasonable steps to enable engagement. For example, it may be necessary and appropriate to hold the meeting in person at a local office.

13. Payment process

13.1 The individual should use the Expenses and Allowances [claim form](#) to submit a claim for any expenses and involvement allowances. This should include details of the bank account that the individual wants payment to be made to. This information must be provided on each new claim form unless the claimant has set themselves up as a supplier with the County Council. If they have registered as a supplier, the individual should provide their Vendor ID on each occasion that they make a claim. Guidance on how to register as a supplier is available on the [County Council's supplier self service pages](#). Please note payment can only be made by bank transfer.

13.2 The [claim form](#) should be sent by email to the Lead Officer with electronic copies of receipts attached. Paper copies can be sent to a nominated postal address which the Adults' Health and Care Lead should provide.

13.3 The Lead Officer should check the form and, if required, raise any queries with the claimant. A record should be maintained of the details of the claim, ensuring that any associated paperwork (for example original or scanned receipts) is referenced, maintained and available for internal audit evidence. Any personal data should be secured securely on a SharePoint site with access restricted to only those who require the data to process the claim, or for audit and analysis purposes. The retention period of resident expenses and allowances is seven years from the end of the current financial year. The Lead Officer is

responsible for ensuring that personal information is managed in line with the County Council's [Data Protection Policy](#).

- 13.4** Payment should be authorised from the relevant budget holder, as necessary. Once approved, information from the completed form should be entered into the NonPurchase Order Upload template and submitted to the payments team via the IBC Portal. Guidance on making non-Purchase Order payments is available on the IBC: [IBC Guidance on making non-Purchase Order payments](#).
- 13.5** Where payments are being made to an organisation for onward distribution to participants, the supplier must be set up on the County Council's system. Guidance on setting up a supplier number is available on the IBC: [IBC Guidance on setting up a supplier number](#).
- 13.6** Expenses should be recorded with the following SIO code: 4000652
- 13.7** Allowances should be recorded with the following SIO code: 4000651
- 13.8** The recommended GL code: GL5365 (Non-Staff Subsistence and Expenses).
- 13.9** A remittance advice will be emailed to the claimant which will include details of the co-production payment. This will include a payment document number which is located on the top right of the remittance and begins with 970. This will appear as the reference on a bank account when payment goes through. Claimants will need to cross reference from the bank statement to the remittance advice to understand the purpose of the payment.

14. Implementation Considerations

- 14.1** This guidance is available to staff on the Adults' Health and Care [policy and procedures webpages](#), as well as the Directorate's [let's go with co-pro](#) website.
- 14.2** There are no training requirements necessary to support implementation of this policy.
- 14.3** Implementation of the policy may be periodically subject to corporate or internal audits as determined.
- 14.4** The guidance will be reviewed annually.

15. Statutory and other duties

- 15.1** Adults' Health and Care has a duty to provide accurate information about expenses and involvement payments when asked to do so by Government agencies.
- 15.2** Information about participants should be managed in line with the Directorates Information Governance policies and procedures. All personal data should be securely stored, appropriately managed in line with data protection legislation.

15.3 If there is any concern that expenses claims are fraudulent in nature, this should be brought to the attention of the Lead Officer, and their Manager, as soon as identified. Any apparent anomalies should be queried with the person making the claim in the first instance.

15.4 Hampshire County Council is committed to ensuring that all staff and participants of co-production are informed about their responsibilities under the Bribery Act 2010. This legislation makes it a criminal offence to offer or accept bribes, whether in the form of financial benefits or other advantages, to improperly influence the performance of any relevant function or activity. The consequences of violating this Act can be severe, and there are no limits on the fines that may be imposed. Individuals found guilty of an offense could face prison sentences of up to 10 years. For further information see [The Bribery Act 2010 - Quick start guide \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

16. Equality and Impact Assessment

16.1 This policy supports the [County Council's equality objectives](#), and those of the Adults' Health and Care – namely, to listen, learn and grow into a more inclusive Directorate:

- That recognises and understands the diversity of the community it serves and involves people in how we support needs.
- Whose diverse workforce feel like they belong, are valued and are able to fully contribute and develop within the organisation.
- That leads inclusively by example and works with our partners to do the same.

16.2 It does so by supporting the involvement of a wide range of service users, carers, and residents in the design and development of Adults' Health and Care services. Inclusion is enhanced by removing financial barriers to people's involvement. By considering, and being responsive to, individual circumstances and the complexity of different people's needs, this policy also encourages the involvement of a wide range of Adults' Health and Care service users and carers.

16.3 The use of allowances to recognise individual contributions to Adults' Health and Care business, further supports service users to work with the Directorate on a more equal footing, which is in line with the aims of co-production.

16.4 The payment of expenses and allowances would not adversely impact any protected characteristic group. Owing to regulations around some specific benefits, individuals in particular circumstances may be unable to choose to accept a paid allowance. Nevertheless, the opportunity to participate will still be made possible via provision of expenses.

16.5 Adults' Health and Care aims to support a broad range of people from across Hampshire's communities in shaping its work, including people from under-represented groups (with reference to the protected characteristics covered by the Equality Act 2010). Careful consideration should be given to understanding how best to support engagement with under-represented groups and whether it may be more appropriate to work with an external partner or via an existing

community forum. For example, a third party may be able to take a more flexible approach to payment of expenses and allowances where participants may not have access to a bank account.

- 16.6** Use of technology and digital platforms should be used appropriately and not become a barrier to participation. Where service users do not have access to technology or equipment to enable them to participate then this should be recognised, and reasonable steps taken to enable their engagement. For example, it may be necessary and appropriate to hold the meeting in person.

17. Climate Impact Assessment

- 17.1** This policy sets out a clear expectation that precedence will be given to undertaking involvement activities virtually, in so far as this is both practical and appropriate to engaging the intended audience. Where travel is necessary and justifiable, preference is for public transport modes. This supports the County Council's target to become carbon neutral by 2050 by encouraging approaches to engagement that minimise carbon output.

- 17.2** There is also a cost and productivity gain to taking this approach. Service user and carer representatives have also indicated a preference for virtual methods, which has allowed a greater mix of service users to engage with the Directorate than would have been the case if meetings required physical attendance.

18. Appendices

- 18.1** Appendix 1 - Co-Production Participation Levels Nov24 V1 (which can be found on the Let's Go with Co-Pro site here- [Policies | Health and social care | Hampshire County Council](#))