

Co-production Charter

Involving people with lived
experience in developing
mental health policies and
services in Scottish Borders



Involving you to improve
health and social care



Produced by

*The Scottish Borders Mental
Health and Wellbeing Forum*



“Co-production is an approach that combines our mutual strengths and capacities so that we can work with one another on an equal basis to achieve positive change. It is about involving people in the planning, delivery and review of public services, helping to change relationships from dependency to genuinely taking control. This involves active dialogue and engagement to create something jointly, thereby achieving better results or outcomes.”

*(The Introduction to Co-Production,
Scottish Borders Community Planning Partnership).*

INTRODUCTION

In 2016, Scottish Borders Council (SBC) adopted **The Introduction to Co-production Toolkit**, produced by the Community Planning Partnership. The intention was that it would be used alongside the **SBC Community Engagement Toolkit 2015-18** when planning, delivering and evaluating co-production activities.

The Toolkit stated: *"Adopting a co-production approach means that we will work in partnership with people who live and/or work in the Borders to help us deliver the best possible services."*

The Community Engagement Toolkit followed the Scottish Government's **National Standards for Community Engagement**, which set out best practice principles for the way that government agencies, councils, health boards, police and other public bodies engage with communities.

SBC has also adopted the National Involvement Network's **Charter for Involvement**, which set out - in their own words - how supported people want to be involved in the support that they get, in the organisations that provide their services, and in the wider community.

Following discussions with the local Mental Health and Wellbeing Forum (MHWBF), facilitated by Borders Care Voice, the Scottish Borders Mental Health Partnership Board identified a need for a separate charter. This would set out how people with lived experience of mental health issues and their carers would be involved in co-production in relation to mental health policies and services.

As a result, the MHWBF hosted a Consultation Café, to identify how the national standards would best be applied locally to ensure co-production in mental health practice.

This document is the result of those discussions, and is based on the seven National Standards for Community Engagement, reflecting the main elements for good engagement:

- ▶ Inclusion
- ▶ Support
- ▶ Planning
- ▶ Working Together
- ▶ Methods
- ▶ Communication
- ▶ Impact

PURPOSE

The purpose of this document is to ensure that the national standards of engagement are applied in relation to all mental health services in the Scottish Borders. This means that people with experience of mental ill health, their carers, and people who use services are involved from the start of any commissioning, change or redesign process, through to

completion, including evaluation and review. It will mean that their voices are heard, and their knowledge and experiences are valued.

As both NHS Borders and Scottish Borders Council have adopted the national standards for community engagement, implementing this charter should be a simple process.

DEVELOPING THE CHARTER

At the Consultation Café, members of the MHWBF and partner organisations were invited to voice their views and expectations about co-production. The event was facilitated by staff from the Scottish Health Council, who collated the comments and responses of those attending.



This document was created as a result of that event. It encompasses the Scottish Government Standards for Community Engagement, adopted by Scottish Borders Council and NHS Borders.

PRINCIPLES

The following principles underpin this document:

- The knowledge and skills of people with lived experience, including that which arises from contact with services, should be validated and utilised.
- The interests of people with lived experience will be prioritised.
- A recognition that people with lived experience and their carers are not necessarily used to working in the same way as staff.
- The right to hold to account the people and organisations responsible for protecting people's rights to provide feedback without fear of reprisals, and to have access to justice when their rights are affected.
- People with lived experience and their carers will fulfil what is required of them to the best of their ability, and expect this in return.

PRINCIPLES

(contd.)

- All parties will be treated with dignity and respect, always.
- People with lived experience will be free from discrimination.
- The different ways in which people think and experience issues will be valued.
- A recognition that involving people with lived experience can only improve services.
- Co-production takes time, and this will be recognised when setting deadlines.
- People with lived experience will have the same access to personal development opportunities as other partners.

The National Standards for Community Engagement (Scottish Government)



MEETING THE STANDARDS

Standard 1 - Inclusion

We will identify and involve the people and organisations that are affected by the focus of the engagement.

What will this look like in practice?

As soon as a piece of work has been identified by the Joint Mental Health Service, people with lived experience, and carers, will be included in any working group as main stakeholders. The MHWBF will be given an appropriate timescale (where possible a minimum of six weeks) to recruit at least two representatives to be involved. If six weeks is not feasible because of the urgency of the project, all parties should agree an appropriate timescale.

The types of activity to which the above refers include:

- commissioning and procurement of all mental health services
- planning and strategy work/ meetings
- recruitment of staff
- proposed closure of services
- where appropriate, changes of procedures / processes / service models
- Mental Health Board and other joint planning groups
- psychological development service quality/improvements
- consultation processes - before, during and after such events
- other initiatives within mental health.

The following information is required by those involved:

- details of locations (venues must be fully accessible)
- what transport costs will be met (eg community transport/taxi or mileage)
- the process for claiming travel and other expenses and how these will be reimbursed.

Timescales

- the duration of each meeting
- how often meetings will be held
- the projected completion time of the project/piece of work.

Purpose of the meeting/work

- objectives and aims of meetings/other work
- expected outcomes.

Involvement in meetings

- which professionals will be involved
- which other public representatives will be involved
- how people will be communicated with
- how and when relevant paperwork will be circulated.

In order to ensure data protection laws are adhered to, people with lived experience will be required, where necessary, to sign the confidentiality statements for the work they are supporting.

Standard 2 - Support

We will identify and overcome any barriers to participation

What will this look like in practice?

Support will be provided where appropriate and as agreed before, during and after meetings/discussions.

Pre-meetings for Mental Health Board

The purpose of a pre-meeting is to go through the agenda and papers beforehand, to ensure that individuals have an understanding of the discussions that will take place in the meeting. It also helps them to understand what is expected of them during the meeting and can help to make them feel at ease.

Emotional Support

The pre-meeting will be an opportunity to identify any support that may be required. People have experiences which may make them sensitive to some issues and emotional support should be given at the meeting when needed. The pre-meeting will ensure that anyone supporting an individual, or speaking on their behalf, understands what that individual wants to say. Borders Care Voice supports service user representatives at Board level and can assist with emotional support in pre-meetings. Pre-meetings do not need to be held on the same day as the meeting.

Overcoming other barriers:

- the venue must be fully accessible
- plain English must be used. Any jargon should be explained
- everyone has equal regard at the meeting
- everyone will have time to fully express themselves
- people with lived experience, and their carers, should be assured that their input is valid
- everyone will have the chance to listen, respond and take note of everything said
- there will be introductions at the start of every meeting/gathering
- the particular needs of carers who have responsibilities and sometimes employment commitments must be considered. Timings of meetings should, when possible, be adjusted to accommodate carer involvement
- there should always be a comfort break during long meetings.

Standard 2 - Support continued overleaf

Standard 2 - Support (contd.)

Communications

It should not be assumed that everyone is confident using, or has access to, modern technology or the internet. Information should be communicated in the most appropriate way for each individual, using the following methods:

- e-mail
- post
- telephone.

Minutes/notes from all meetings should be produced and made available to all attending.

Outcomes from all meetings must be fed back in an appropriate format for the individual. It is important that each person knows the effect of their contribution.

Who will communicate?

Representatives should be given the following information:

- name of administration person and contact details
- name of the project lead.



Standard 3 - Planning

There is a clear purpose for the engagement, which is based on a shared understanding of community needs and ambitions.

What will this look like in practice?

- The budget and resources for carrying out public involvement and ensuring co-production should be identified and fully costed at the initial project planning stage.
- The budget for both co-production and the project or commission itself should be clearly identified at the start of the process to public representatives.
- Co-production should begin before starting new projects and commissioning (co-design).
- Co-production is a two-way process and should take place before any pre-conceived ideas have been developed.
- Engagement exercises and consultations should be relevant to the project/work and fit for purpose.
- Engagement exercises should be as wide-ranging as possible, using all methods of communication.
- Where necessary and feasible, people with lived experience could create a "deed" of conduct and objectives that everyone in the group signs up to.
- Consideration should be given to identifying how best to include people who may take ill during the consultation process.
- There should be regular involvement during the entire process with updates about any changes.
- Creative and blended methods should be used for consultation and involvement, including social media, online surveys, phone calls, focus groups, and all-day events for larger groups.
- All policy and relevant documents should be written in plain English.
- If decisions cannot be implemented, reasons should be given.

Standard 4 - Working Together

We will agree and use clear procedures that enable participants to work with one another effectively and efficiently

What will this look like in practice?

- There will be a recognition that people with lived experience and their carers are not necessarily used to working in the same way as staff.
 - People with lived experience and their carers will fulfil what is required from them to the best of their ability and expect this to be given in return.
 - At least 24 hours' notice will be given of cancellation of meetings. If this is not possible, the lead person or a representative should attend the venue to meet and advise individuals of the situation unless all individuals concerned have been verbally notified.
 - All costs associated with the cancelled meeting (venue hire, transport, etc) will be reimbursed.
 - If an individual cannot attend a meeting, apologies will be given and a replacement found, if appropriate.
 - If an individual becomes unwell during the process, their place will be kept open and another person will be identified to deputise in the meantime. A way will be found to get their views if possible.
- Where there are multiple stakeholders initiating a piece of work, all parties will agree the process and principles of co-production to be used.
 - There is no one voice for people with lived experience. There are many different views and priorities. Representatives and Borders Care Voice will do their best to capture all the different views.
 - All group members will consider different ways of getting views.
 - The easiest or cheapest solutions should not be agreed without further discussion or investigation.



Standard 5 - Methods

We use methods of engagement that are fit for purpose

What will this look like in practice?

- Meetings will not be the only method of engagement. It should be recognised that many people are uncomfortable in this setting.
- All engagement exercises will be as wide-ranging as possible, using a variety of methods of communication, including surveys, focus groups, etc.
- Where appropriate, use will be made of groups that people with lived experience and carers already attend, including groups run by statutory services.
- Borders Care Voice will explore new methods of engagement and the importance of this development work should be recognised.
- Staff may have to adapt meetings and processes to ensure co-production.

Standard 6 - Communication

We will communicate clearly and regularly with the people, organisations and communities affected by the engagement.

What will this look like in practice?

- All group members will be equally involved.
- If e-mail communication is not appropriate, steps will be taken to ensure information is disseminated in a timely and appropriate way.
- Transparency from all group members is essential.
- It will be made clear which matters are confidential and which can be shared.

Standard 7 - Impact

We will assess the impact of the engagement and use what has been learned to improve our future community engagement.

What will this look like in practice?

- There will be a consistent approach for feeding back the outcomes and decisions of any work carried out. This may need to be flexible, depending on the nature of the work.
 - The partnership will be reviewed at regular times.
 - This will include the rationale behind the decisions and outcomes.
 - Different ways of disseminating the outcomes will be used to ensure that the needs of individuals are met.
 - During all projects, people with lived experience and their carers will be engaged fully in all monitoring and evaluation processes relating to the work they have been involved in.
- Debriefing meetings will be held at the end of all projects and engagement processes, to discuss what went well and where improvements could be made. Appropriate action will be agreed and taken to improve the process for all those involved.
 - The budget and plan for co-production will be regularly reviewed by the project officers as well as people with lived experience.
 - Evaluation will take place using the **Co-production Toolkit** and the **National Standards for Co-production**, using a matrix/self-assessment tool.
 - Consideration will be given to how well the project/piece of work met the set outcomes and targets.

ASSOCIATED DOCUMENTS

- ▶ **The Introduction to Co-production Toolkit -**
[https://www.scotborders.gov.uk/downloads/file/2226/an introduction to co-production](https://www.scotborders.gov.uk/downloads/file/2226/an-introduction-to-co-production) **Scottish Borders Community Planning Partnership**
- ▶ **Community Engagement Toolkit 2015-18 -**
[https://www.scotborders.gov.uk/downloads/file/2245/sbc community engagement toolkit](https://www.scotborders.gov.uk/downloads/file/2245/sbc-community-engagement-toolkit) **Scottish Borders Council**
- ▶ **National Standards for Community Engagement -**
<http://www.voicescotland.org.uk/> **Scottish Government**
- ▶ **Charter for Involvement -**
<https://arcscotland.org.uk/involvement/charter-for-involvement/> **National Involvement Network**



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