**Service Specification**

Healthwatch Surrey CIC is an independent organisation that gives the people of Surrey a voice to improve, shape and get the best from health and social care services by empowering people and communities.

As a social enterprise Healthwatch Surrey CIC uses its reach, networks and knowledge to deliver responsive and professional services for local government, Clinical Commissioning Groups, NHS England and other organisations.

This is a specification for bespoke services to be provided by Healthwatch Surrey CIC. Information on the types of services we provide [can be found on our website](http://www.healthwatchsurrey.co.uk/wp-content/uploads/2017/08/Enabling-Effective-Engagement.pdf) or by contacting our team at enquiries@healthwatchsurrey.co.uk or 0303 303 0023

**Citizen Ambassadors for**

**Surrey Heartlands Health and Care Partnership**

***Year 5 2022-2023***

## **Introduction**

The Citizen Ambassador (CA) programme has been running for four years and currently provides a separate CA for five workstreams in Surrey Heartlands. Having 5 CAs has ensured a breadth of knowledge, experience and focus to each workstream and has also allowed for collaborative working if the need occurs. In Year 5 an additional CA for Inequalities will join the team. The innovative ground-breaking nature of the programme was recognised in 2018 by being awarded the ‘NHS 70’ Healthwatch England award for putting people at the heart of care. The CA programme is an integral part of Surrey Heartlands’ citizen-led engagement and communications approach.

In its fifth year, it is crucial that the CA programme continues to embed itself into relevant workstreams by delivering clear, measurable benefits. This requires using learnings gained from the implementation of the programme in 2020 – 2021 and applying them across all workstreams to ensure CAs are working cohesively with their workstreams and identifying gaps in current knowledge where they can add value. Reporting will continue to be a major focus in 2022/2023, to provide workstreams with citizen insight they require to make decisions based on meaningful service user experience. We will look to build upon the recommendations from the interviews conducted in November and December 2021 by the SCC Research intern and the Strategic Lead - Research (SHHCP). This will include the effectiveness of the increased hours from 10 to 15 hours, looking to improve the feedback loop between Workstream Leads (WLs) and CAs and considering opportunities in which the CAs can work in more collaborative projects together.

It remains an important distinction to have the CAs supported directly by Healthwatch Surrey, giving the programme an independence from the NHS that promotes direct, critical and honest feedback.

### Contract Manager(s)

*Contractor:* Rich Stockley, Head of Research and Engagement, Surrey County Council, 07738 756 659 - richard.stockley@surreycc.gov.uk

*Healthwatch Surrey CIC:*  Lisa Sian, Chief Operating Officer, Healthwatch Surrey CIC, 07872 573966 - lisa.sian@healthwatchsurrey.co.uk

### **Agreement between Healthwatch Surrey and Surrey Heartlands Health and Care Partnership**

Healthwatch Surrey CIC will assume responsibility for:

1. Policy and practice of recruitment & selection – in line with agreed job description (see Appendix 1) and specified programme requirements. Once appointed, it is Healthwatch Surrey’s responsibility to update the Workstream Lead (WL) and to involve the WL in start dates and induction plans.
2. Induction – based on 2021 implementation
3. Training - based on 2021 implementation, all CAs to attend qualitative research training when joining the programme (if training is available at the time).
4. On-going support – day-to-day support in setting up engagements and reporting findings
5. Performance management of CAs – including management of CAs not meeting criteria in JD
6. Reporting of insight findings to Surrey Heartlands – outlined below

Surrey Heartlands HCP will contribute to:

1. Recruitment & selection – dependent on programme needs
2. Induction – SH can help source training courses for CAs and support WLs with local induction/introductions
3. Performance management processes – SH will inform HW if performance of a CA is not meeting expectations
4. Reporting – SH agrees to disseminate findings collected by CAs via the appropriate channels/programme boards and will strive to gather feedback and next steps, this will be a key priority for 2022-2023 following the findings of the 2021 evaluation.

Healthwatch Surrey CIC will quality assure the programme, however the programme will be jointly evaluated by Healthwatch Surrey and Surrey Heartlands HCP. Ongoing monitoring will take place with a view to undergo a 360-feedback evaluation of the programme in Autumn 2022.

### Method & Approach

The following activities to be led and coordinated by Healthwatch Surrey CIC unless otherwise specified.

#### **Recruitment & Selection**

Should recruitment of a new CA be required the recruitment process outlined in the original Service Specification (dated November 2017) will be followed. Healthwatch Surrey will involve Surrey Heartlands HCP in the recruitment and selection of a new CA, based on the specific requirements of the workstream, as specified by the WL. The recruitment of any new CAs will be charged to Surrey Heartlands at a cost of £750 per CA. This cost includes, advertising, communications of post, selection, shortlisting, interviewing and associated venue costs. Note: this is recruitment only, not related to management, salary or other associated costs for the CA once in post.

##### Employment

The CAs are employed directly by Healthwatch Surrey CIC and thus will be paid by Healthwatch Surrey CIC. A new contract for 2022/2023 will be issued accompanied by a detailed role description, reporting process chart and an overview of expectations /deliverables. It will be noted within the contract that the roles and responsibilities of each CA are subject to change, as per the priorities of Surrey Heartlands HCP. The contract period will commence on 7th February 2022 for 1 year.

As some of the CAs have been contracted for more than 2 years, statutory redundancy will need to be paid in the event of terminating of their contract. Healthwatch Surrey CIC would need to give each CA one weeks’ notice for each year of employment. Redundancy would be payable to each CA who has been employed by Healthwatch Surrey for 2 years or more and is over the age of 41 1.5 weeks redundancy pay. For CA’s under the age of 41 it would be 1 week. Redundancy would be paid to the qualifying CAs using any underspend on the budget, before returning any surplus funds to Surrey Heartlands.

#### **Induction**

When joining the programme, existing CAs followed an induction programme educating them on Healthwatch Surrey CIC policies and procedures including:

* Reimbursement of expenses
* Data Protection Act 2018 – Data protection policy
* Safeguarding Adults & Children
* Equality and Diversity
* Lone Worker
* Performance Management
* Health & Safety
* Equality & Diversity
* Qualitative engagement training (theory and practical) externally provided by a professionally qualified organisation/trainer, such as the University of Surrey or the Social Research Association, where such courses are available.

Any new CAs coming on board in 2022-2023 will follow the same induction programme. The induction programme should be agreed with each WL to ensure there is equal priority given to on-boarding and citizen engagement activities (i.e. during the first three months induction training courses should not take up more than 50% of an individual’s monthly hours (ongoing no more than 25% per month) to allow CA time to engage with their workstream and citizens). As part of their induction, CAs should be introduced appropriately to their programme manager, who will be responsible for providing information on the specific workstream details, such as programme board, contacts, and context of Surrey Heartlands HCP. Healthwatch will support the relationship between the CA and WL and facilitate a feedback loop between the CA and WL so the CA is aware of the impact they have made to the workstream

#### **Training & on-going support**

##### Healthwatch Surrey CIC

It is the responsibility of Healthwatch Surrey CIC to ensure that appropriate refresher courses are provided to CAs, in line with training and government requirements. For example, a refresher course on GDPR data protection/Information Governance is required to be completed by all CAs every year. As noted above all CAs will undergo qualitative research training when joining the programme.

*Note: The year 5 training budget is £2,000.00 in total, (£1,000.00 surplus from 2021 is to be carried over plus an extra £1,000.00 for 2022) training over and above that budget will need to be agreed in advance and be charged to Surrey Heartlands at cost. Any training budget (up to £2000) not used during Year 5 will be reimbursed to SHHCP.*

On an on-going basis, each CA will be required to attend and participate in a mandatory quarterly Learning Set meeting (2 hours maximum length) with other CAs and, if necessary, 6 x (1hour) 1-2-1 meetings with the Healthwatch Surrey Project Manager. These meetings will count towards their allocated monthly hours.

On a day-to-day basis, Healthwatch Surrey CIC will support the CAs by helping them book and organise engagement opportunities and events with suitable audiences (i.e. helping CAs find where to engage with their target audience).

Healthwatch Surrey CIC will also provide support to the CAs with reporting (see reporting section below) following engagement events. All engagement events should have a clear focus and be written up showing how the engagement aims were met. Surrey Heartlands Workstream Leads will work with the CA to provide guidance on the focus for engagement.

##### Surrey Heartlands HCP

Occasionally, additional training opportunities may be offered by the NHS or Surrey County Council (SCC) to CAs to complete outside of their allocated monthly hours. These are seen to benefit the professional development of the CA, so will be unpaid (unless otherwise specified). There is not an expectation for CAs to attend these if they cannot. If CAs do attend, the hours should not be deducted from their monthly hours. If CAs are unable to attend the additional training opportunities this will have no bearing on performance assessment.

The Research Team at Surrey Heartlands can provide support to CAs by assisting them to engage with their workstreams, promote their roles and findings and advising on best research method/approach to employ when undertaking research. The SHHCP Citizen Panel is available as a resource to CAs if quantitative (survey) methods are deemed more appropriate by the CA and the WL.

Surrey Heartlands and Healthwatch Surrey will foster a collaborative working relationship by setting up a regular working session, we will also look for opportunities for the CAs to work collaboratively with one another on joint projects as the 2020 evaluation showed this was something the CAs found enjoyable and beneficial.

#### **Performance management**

Upon renewal of contracts in February 2022, each CA will receive a detailed role description, reporting process chart and an overview of expectations /deliverables.

In Year 5 the key objectives for the CAs will continue to be:

* To build and maintain strong working relationships with the workstream which will enable the CA to provide valuable insight to SHHCP.
* To engage, involve and speak to people *who do not already* engage in service change within the NHS (e.g. not via the participation mechanisms established (i.e. SH stakeholder groups)) to look for new ways to reach these people, when face to face engagement is not possible;
* To consistently and concisely feedback to the workstream Lead and the central team on engagement activity and how that activity *added* to existing knowledge - with themes identified for further discussion by the workstream and suggestions of how insight can be built upon by further engagements;
* To maintain independence and provide constructive challenge (leading to generation of new ideas for service transformation)
* To attend the Quarterly Learning Set Meeting (mandatory).

##### Healthwatch Surrey CIC

Healthwatch Surrey CIC will collect feedback from Workstream Leads and programme members. Throughout the process Healthwatch Surrey CIC will collate all the feedback, present it to the WLs and gain the WLs input and seek their agreement before any reviews with the CAs are carried out.

The performance of all CAs against the job description/expectations will be continually monitored by Healthwatch Surrey and Surrey Heartlands. Any CAs not meeting their job description/key objectives will be performance managed accordingly, by Healthwatch Surrey CIC, with the expectation from Surrey Heartlands HCP that CAs should:

* Be aware of their role description and key objectivities
* Have the appropriate training and support provided in order to undertake their role
* Be using their time and activities as described to meet their objectives.

Healthwatch Surrey CIC will manage performance in line with the principles and arrangements for dealing with disciplinary and capability, as outlined in the Healthwatch Surrey Employee Handbook which is shared with every employee when joining Healthwatch Surrey CIC.

New CAs will have a three-month probation period, at the end of which a joint decision must be made by all three parties (CA, Healthwatch Surrey CIC and Surrey Heartlands HCP) to continue with the full contract.

#### **Activity and project output / reporting**

##### Citizen Ambassadors

For each engagement activity CAs are expected to feed back their findings in a clear and concise manner to the Workstream Lead. This would as a minimum include, who was spoken to, what themes emerged, recommendations for how the workstream can use/discuss the insights gained and suggestions for future engagement. The format in which to provide feedback to the workstream should be agreed before the engagement and may differ between engagement activities. CAs will be required to provide a brief summary update outlining the above, by email (or verbally), to the project manager at Healthwatch Surrey CIC after each engagement who will then add that to the central summary database.

##### Healthwatch Surrey CIC

Healthwatch Surrey CIC will add the engagement summaries to the central summary database and send to the SHHCP Research Team on a monthly basis.

##### Surrey Heartlands HCP

Where required, the Research Team at SH will disseminate the information across the workstreams and will endeavour to follow up to ensure workstreams are utilising findings from citizen engagements and providing feedback.

##### Communications

In addition, CAs will be asked to provide SH with content that can be used to promote the work of the CA programme. CAs will be supported by SH (including the workstream) to complete a communications plan as part of each project. This plan may include strategies around:

* Content for micro-blogging such as posting on social media, e.g. Twitter, Facebook, Instagram
* Micro-blogging from a central Healthwatch Citizen Ambassador social media account, e.g. on Twitter
* Video notes for social media\*
* Suggestions from engagements for case studies

Communications activities can be shared by both parties, with the approval/final sign off of Surrey Heartlands Communications & Engagement Team.

\*It is recognised that some CAs may need support and training to do video notes.

#### **Project Resources**

The following resources will be funded by Healthwatch Surrey CIC, as part of this service specification. Where appropriate, Surrey Heartlands will support with resources to reduce costs.

* Venues for induction training, appraisals and quarterly meetings
* Venues for community engagement activities
* Tailored training and support programmes
* Healthwatch Surrey CIC staff time
* Process through which CA will receive their compensation. Please note that incentivising participants will not be customary and only considered for special circumstances, with an understanding that the SHHCP Research Team will have greater involvement in any incentivised projects to ensure the quality of the output is proportional to the additional spend.

#### **Risk Assessment**

Key risks that will need to be managed in the programme include:

* The majority of the CA participation begins to mirror the beliefs and participation of people within ‘the system’
* CAs begin acting beyond their role i.e. having influence within the system beyond the brief or being perceived by the community as acting beyond a brief
* CAs begin to believe they are, have become, or are perceived as ‘experts’ in service delivery
* CAs begin to believe they are, or have become, experts in citizen engagement and have unreasonable expectations about how to conduct engagements.
* CAs cannot perform the task in the allocated hours.
* CAs leave and there is a higher than anticipated level of turnover.
* The workstreams understanding the role and remit of the CA
* The workstreams failing to engage in the CA Programme

#### **Project Budget**

Healthwatch Surrey CIC will provide IT equipment at cost to Surrey Heartlands HCP, IT support will be provided by Healthwatch Surrey CIC. It is assumed that IT equipment costs were covered in Year 1 of the project[[1]](#footnote-2), and therefore should not be included within ongoing Year costs. Should any addition IT needs arise for example, additional CA joining the programme, these will be need be discussed and negotiated between both signing parties.

Any IT equipment purchased is property of the programme.

Beyond these costs the budget for the programme, inclusive of 6 CAs, is:

|  |  |
| --- | --- |
|  | **Annual budget** |
| Year 5 | £62,294.00 |
|  |  |

*VAT is not currently applicable however should Healthwatch Surrey CIC register for VAT during the period of this contract, VAT will apply. Whilst we are not registered for VAT at the moment we reserve the right to charge VAT on this contract should our Board take the decision that we must register for VAT.*

As this 1-year contract reaches its end Healthwatch Surrey will require an indication and discussion as to whether the programme is likely to renew 2 months’ prior to the contract end, (7th December 2022) and 1 month formal notice for year 6 (by 7th January 2023).

**Evaluation of the programme**

In Year five the Evaluation of the programme will consist of a 360 review of the CAs in their role. Workstream Leads will be given the opportunity to comment on whether the CA has fulfilled the role as set out in the Job Description (see Appendix 1). Citizen Ambassadors will likewise have the opportunity to appraise whether they have achieved their main objectives, and if not, what barriers have prevented them from doing so.

CAs will have regular 1 to 1s with the CA Project Manager (HWSy) and an annual 360-degree review meeting conducted by HWSy with SHHCP Research Lead in attendance.

Each CA will be assessed for meeting specific objectives, such as 8 engagement activities per year, incorporating KPIs into their research projects and building/maintaining strong links with the workstream. These will feed into wider performance management if concerns arise that objectives are not being met.

#### **Intellectual Property**

Intellectual property brought into or developed in the course of this programme will be equally shared between Surrey Heartlands HCP and Healthwatch Surrey CIC, both of whom will be free to use the intellectual property beyond the programme. Findings relating to ad-hoc projects carried out by Citizen Ambassadors will be shared between Surrey Heartlands HCP and Healthwatch Surrey.

#### **Timescales**

A six-monthly contract review meeting will take place in August 2022

#### **Payee Account Details**

Bank name: Nat West

Bank holding address: 151 High Street, Guildford, GU1 3RA

Bank sort code: 60-09-21

Bank account number: 74722999

Bank account name: Healthwatch Surrey CIC

Remittance advice email: healthwatch@surreyilc.org.uk

VAT registration number: None

VAT type: Zero Rated however should the CIC be required or advised to register for VAT during this contract, VAT will apply.

Payment terms: An upfront payment of £ 62,294.00 within 30 days.

Healthwatch Surrey CIC standard Terms of Business shall apply to this Service Specification other than where they are expressly overridden by this Service Specification.

**Job Description & Person Specification – Year 5**

**Title:** Citizen Ambassador

**Role:** To be a full and active participant in the governance and leadership of a transformation programme in health and social care at meetings and through related activity e.g., service visits / research projects (by agreement). To draw in the unengaged voices (i.e., the “silent majority”) and to increase insights into issues around inequalities To report back the outputs from active engagement with local citizens using the agreed engagement reporting sheets. To provide a constructive, alternative and independent perspective on discussions and decisions made within a designated transformation programme.

**Responsible to:** Healthwatch Surrey CIC

**Working Hours:** 15 hours per month (to be worked flexibly)

**Salary:** £20.40 per hour, plus expenses

**Based:** Home based, with travel across Surrey

The initial contract will be for one year with the aim of extending it for a further year following a formal review.

**Job Summary:**

Within a designated Surrey Heartlands Health & Care Partnership programme:

* Actively build and maintain strong working relationships with the SHHCP workstream, including, but not limited to, the Workstream Lead. Utilise relationships with workstream to gain an understanding of knowledge gaps and areas of focus.
* Contribute to the co-design of your service change programme by being an independent voice, bringing your own insight gained from engaging with local people and communities who do not already engage in service change within the NHS
* Hold at least 8 engagement events per year (face to face or virtual) to engage with local communities, to develop an enhanced ‘live’ perspective on the challenges and opportunities facing the service change, and to report back to the workstream
* To report insight gathered from Citizen engagement to the workstream programme manager, including key themes and areas for further investigation
* Strategically influence and improve the quality of health services by ensuring that the views of the silent majority (including patients, their carers and families) are represented at all levels and by challenging professionally held assumptions
* Prepare for, attend and contribute to monthly programme board meetings, when relevant/appropriate, as advised by the programme manager
* Provide Surrey Heartlands HCP with content and relevant contacts that can be used/approached to promote the work of the programme including; content for social media and case studies from engagement:
* Content for micro-blogging such as posting on social media, e.g. Twitter, Facebook, Instagram
* Video notes for social media
* Suggestions from engagements for case studies
* Use generic Healthwatch Citizen Ambassador social media account to promote activities and to micro-blog
* Share insight into the views and experiences of people who use services and who do not already engage with service change within the NHS (including those gathered by Healthwatch Surrey)
* Attend and participate in quarterly ‘learning set’ meetings with other Citizen Ambassadors to share learnings and best practice
* Guide the focus of discussions and decisions around people who use services and who do not already engage with service change within the NHS and Surrey County Council
* Bring a different perceptive which can challenge existing preconceptions
* Invigorate debate and discussion with new ideas and different ways of thinking
* Help identify the key outcome measures that patients and their families would be most interested in
* Maintain independence and provide constructive challenge
* Provide experiences to Healthwatch Surrey to be uploaded onto the central database

**General Duties:**

* To follow and abide by Healthwatch Surrey CIC's policies and procedures at all times including Health and Safety, and Data Protection
* To act as an ambassador for Healthwatch Surrey/Surrey Heartlands HCP at all times (a cobranded lanyard will be provided, reflecting the CAs’ role as representative of both organisations)

The job description reflects the requirements of the post at the time of writing. These requirements are subject to change, in line with priorities of Surrey Heartlands HCP and individual programme requirements. Therefore, the job description may need to be reviewed in consultation with the post holder.

A tailored induction, training programme, IT equipment and five hours of administrative support a month will be provided to each Citizen Ambassador.

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| **Person Specification: Skills** |  | |
| **Essential:** |  | |
| Good listening skills |  | |
| Good networking ability |  | |
| An ability to work within a team |  | |
| Excellent verbal communication skills |  | |
| Ability to analyse, interpret and present complex information |  | |
| Ability to reflect the different views and diversity of patients/users including those living with different conditions and from different backgrounds |  | |
| Ability to articulate other people’s views verbally and in writing |  | |
| Ability to plan and manage your own time |  | |
| Willingness to listen and to question until you reach the level of information required to understand |  | |
| Ability to maintain confidentiality of sensitive/personal information and to adhere to Healthwatch Surrey's Data Protection Policy |  | |
| Willingness to challenge |  | |
| IT Skills |  | |
| Some experience/background knowledge of the transformation programme you are interested in |  | |
| **Desirable:** |  | |
| Ability to use a database |  | |
| Facilitation skills |  | |
| A diplomatic approach |  | |
| **Personal Qualities:** |  | |
| Self-motivated |  | |
| Genuine commitment |  | |
| Enthusiastic/positive |  | |
| Pro-active |  | |
| Resilient |  | |
| Approachable |  | |
| Ability to develop rapport | |
| An enquiring mind | |
| Reliable | |
| Compassionate | |
| A quick learner and have a readiness to develop understanding | |
| **Interest:** | |
| You could have recently accessed NHS services and/or have experience of caring for or managing health/long term condition(s). This will be considered an asset. | |
| Demonstrable interest in a particular transformation programme | |
| Demonstrable interest in broader health and social care improvement | |

**The 6 transformation programmes with CA roles are:**

* Mental health
* Women and children’s services
* Cancer
* Digital
* Prevention
* Inequalities

**Background:**

Surrey County Council and local NHS bodies set out plans for a new programme of transformation of services in October 2016, through which the organisations would work:

“together as a system to transform public services and secure consistent, sustainable, high quality physical and mental health and care for the people of Surrey Heartlands for the long term.”

A key aim of the Surrey Heartlands Health and Care Partnership is to define a new citizen-led approach which embeds direct citizen participation as a core part of the transformation of services.

Surrey Heartlands HCP has already undertaken a significant amount of work to ensure that a broad range of citizens are being heard through research and co-design. However, a truly participatory approach requires the citizen at the centre, not only during the research and co-design phases, but also during planning, governance and evaluation stages of the work. By playing an active and independent role in planning, design, implementation and evaluation processes, CAs will help us to develop a much richer understanding of community priorities and perceptions of these processes.

The work of individual workstreams will be supported by the ‘Citizen-led communications and engagement workstream’ to ensure a deeper understanding of Surrey Heartlands HCP citizens is developed. Key documents will be shared transparently via the Surrey Heartlands HCP website.

The population of ‘Surrey Heartlands’ is people living within the catchment areas of four Clinical Commissioning Groups; Guildford & Waverley, North West Surrey, Surrey Downs and East Surrey.

The independence of CAs is one of their key benefits and it is therefore important that CAs are perceived to be operating relatively autonomously. In order to achieve this, the CAs will be independently managed by Healthwatch Surrey.

Healthwatch Surrey will take overall responsibility for the policy and practice of recruitment, selection, induction, training, on-going support and performance management of CAs.

Healthwatch Surrey will quality assure the programme, however the programme will be jointly evaluated by Healthwatch Surrey and Surrey Heartlands HCP.

Healthwatch Surrey is an independent organisation that gives the people of Surrey a voice to improve, shape and get the best from health and social care services across Surrey by empowering local people and communities.

As a social enterprise Healthwatch Surrey uses its reach, networks and knowledge to deliver responsive and professional services for local government, Clinical Commissioning Groups, NHS England and other organisations.

1. There are 5 Lenovo laptops that were purchased for the programme in 2018 [↑](#footnote-ref-2)