

Involving People with Lived Experience

Guidance for Corra staff



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How to use this guidance

This guidance is designed to make sure Corra is adopting good practice when working alongside people with lived experience. It will help staff to adopt supportive approaches.

Please note: the published version of this guidance does not include the detail of Corra's internal finance processes. Instead it shares the principles Corra follows for payment of people. This includes adhering to all statutory and/or legal requirements.

The guidance aims to provide:

- A tool to aid planning and ongoing engagement with people with lived experience.
- Protocols around additional support, reimbursing of people's time and payment of expenses.
- Check list for critical consideration points (Appendix 1)
- References to other internal and external resources and guidance (Appendix 3)

The guidance is based on good practice gathered from others working in this way. As well as feedback from our own experiences of people involved in Corra's work. We are grateful to them for sharing honest reflections and recommendations to help improve our approach.

This guidance is a live document and will continue to evolve as we learn and reflect from our own ways of working and more about participatory approaches.

Introduction

Involving people with lived experience of social issues brings far better understanding of those issues to systems, policies, practice, and projects. The process of involvement also begins to tackle the legacy impact of lack of power over decisions affecting people's lives. It can increase agency and control for people and communities experiencing issues. Corra is committed to increasing participatory approaches and striving to be an exemplar in working alongside, and sharing power with, people who bring expertise from their own lives.

There are several ways in which people with lived experience are or could be involved in Corra's work. This includes consultations, research, campaigning, design of programmes, shaping funding criteria/ application materials, making funding decisions, evaluating our work or funded work.

Before progressing any work that will or could involve people with lived experience Corra must ensure:

- The work is relevant and will ensure a fully supported approach for people involved.
- Clarity on the role of people with lived experience.
- Staff feel skilled, confident and supported to deliver the work.

Managers should ensure there is fit with Corra's mission, strategy and ways of working principles. It is likely that Corra has skills across the team to support participation. When planning any involvement staff should speak with colleagues across Corra who can help with planning, resourcing, recruitment and participation.



Clarifying Purpose

It is important that we understand and are clear about why we are asking people to bring their lived expertise to our work. We should always be clear on how people will participate, what support needs to be in place and how we make it easier to take part. We need to ensure that people are involved in a meaningful way and that they know how their contribution will be used and valued.

We need to provide people with all the necessary information to help them make an informed choice about their involvement.

- Purpose
(what it is and why we are inviting people).
- Role and requirements.
- Support structures.
- Reimbursing their time
(if paid how much, what expenses).

If Corra is asked by other partners or contractors to involve people and we feel it is tokenistic or disingenuous, we should help to encourage change as opposed to supporting bad practices. For example, share tools or links to resources, highlight methods or approaches we may take. If we feel unsure about engaging with the partner/contractor or feel bad practices are not changing it raise it with a member of the Senior Management Team.

Importance of Language

For the purposes of this guidance we use the term ‘people with lived experience’, and at times Corra also uses the term ‘lived expertise’. The latter is preferred by some people as it suggests their knowledge is of equal value to that of people with learned/ professional expertise.

When we speak about lived experience or expertise, we are referring to people’s own personal life experiences. This is distinct from what is sometimes termed ‘learned expertise’ which is knowledge gained through someone’s work experience.

It is important to recognise that people will bring a whole range of experience, expertise and skills, of which their ‘lived experience’ will be just one part.

We understand that not everyone will want to be referred to as ‘having lived experience’. We need to acknowledge this and accept it. We should always have a conversation with people on what we mean by different terms, how this could be interpreted and their feeling about this. It is important we have a conversation with each person/group on their preferences.

Language, and how communication is framed, is powerful and we want to be extremely thoughtful about how we use it so that it impacts positively – and not negatively – on our relationships. We communicate in a way that is respectful, inclusive and that challenges – never reinforces – power imbalances and stigma. In developing guidance on language, we engage with communities and aim to use the language that communities themselves use.

At the beginning of any piece of work we should have a conversation with people and collectively agree the language we will use.

- How we refer to the group/piece of work.
- How we refer to people with lived experience of the issue.
- How we frame our language to be positive and supportive.
- Other phrases or preferences (likes or dislikes).

Once agreed discuss with Policy and Communication team to support both internal and external communication/ messaging and consistency.

Corra Staff Communications Guide

Reach, relationships and supporting people

Recruiting and reaching people

Recruitment of people can be openly advertised, through existing networks or word of mouth. It is important that we are accessible and break down barriers that prevent people from participating. All of Corra's work should reflect our commitments to Diversity, Equity and Inclusion and anti-racism. We should always be aiming to have input from a diverse range of people and that will often mean taking proactive steps to reach people who might be under-represented. For example working with networks that have relationships with specific communities.

We need to speak with everyone who is invited and or interested in getting involved in a piece of work. Set time aside to have an informal chat to explain the work, start to build a relationship, gain an understanding of why this interests them, listen to what matters to them.

We need to provide people with 'need to know' information (role, time commitment, support, expenses etc). Create an accessible information sheet that outlines the points as a useful tool to support conversation and recruitment.

When recruiting (especially open recruitment) think about how best we can reach people.

- Consider different formats to promote opportunities (such as videos, local radio, social media).
- Our use of language (Plain English, does it need translated into another language or format).
- Make it feel personal (use our first names, have a picture).
- Ensure 'need to know' information is on all materials.

Key content

for need-to-know information:

- Opportunity or role
- Reimbursement (rate, approach) or volunteer
- Support available (for example any training or support for mental health and wellbeing)
- Expenses covered
- Time commitment

It is also important not to pressurise people.

We aim to be flexible. Let them take their time to consider if it is the right thing for them. They potentially do not need to commit to it all but might be interested in certain elements or contribute less time.

Reach, relationships and supporting people (continued)

When developing the remit for any lived experience input it is important to include all activities to estimate roughly the amount of time needed. This will help the person make an informed decision and enable Corra to budget for costs. See example below:

If a person is on a decision-making panel they are likely to require/costs should cover:

- Reading and/or preparation time – including reviewing applications.
- Drafting or writing materials in relation to recommendations.
- Attending panel meetings including reflecting and learning sessions.
- Attending any conferences/events as part of their work with Corra.

Getting to know people

Working alongside people is built on trusting relationships. It is important that people know they are **welcomed, supported and listened to**.

We need to ensure there is **plenty of time** for people to feel comfortable with us and each other (if a group). We need to come as **ourselves**. Share a bit about us as individuals, we are more than Corra employees. Consider using tools and techniques that help encourage us and others to feel connected. See examples below:

- Ice breakers and 'check-ins' at the beginning each time we meet.
- Collectively generate a Group Contract so people know and understand boundaries.
- Get to know people's likes and dislikes (favourite food, tv etc).
- Leave plenty of space for chats about 'non work' stuff.
- Check-in with people after each session/meeting – how was it for them, any concerns.

We never ask people to share anything about their lived experience unless they choose to do so and in a setting that gives them control of their story.

We need people to be aware that their lived experience may be the main reason we've approached them. However, it is vital they know it is their **contribution as a person with a wider range of skills, knowledge and ideas**.

Listening, safeguarding and support

People are passionate about what drives them to invest their time with us. It is our responsibility to support people to find their involvement fulfilling and worthwhile.

We must be respectful and support an equitable relationship supported by being kind, thoughtful and an active listener. This will help:

- The work to flourish and grow.
- People can see changes happening.
- Understand potentially additional learning/skill development.

Reach, relationships and supporting people (continued)

We need to allow people space to share the experiences, skills they bring and ideas they have.

To do this well requires us to ensure we discuss and support people with:

- How information and materials will be presented and accessed.
- Any additional help to carry out the role (e.g. youth workers if young people involved or someone wants to be accompanied by a supportive adult).
- Any additional training for their (e.g. grant-making, external speakers).

At times we might seek support from colleagues across Corra to help with development or training needs. For example, our Head of Grants maybe asked to give an input on different types of organisations that make up the voluntary sector.

It is the responsibility of the person leading the work to identify and put in place any training or development support.

We need to be mindful of the time people are committing, often as a volunteer or second job. People's circumstances will change, energy or interest may go up and down. Managing our expectations of their involvement is vital. Have regular checks to ask how people are doing. Be aware of the sensitivities as people generally don't want to feel they are letting others down.

We need to be alert to how people are feeling which can be shown in different ways (e.g. are more quiet than usual, stop engaging). If this happens:

- Check in with them and ask if everything is ok, is there more Corra could do?
- If it is something specific about their input (e.g. unsure if they are doing it right) we need to support them, could be additional training.
- If they don't want to continue engagement, never push this. Leave it with an open option for them to re-connect.
- Always check-in again after (whatever is reasonable) just to make sure they are ok.

Reach, relationships and supporting people (continued)

People need to know they can step back at any time if things feel too much or difficult.

We need to acknowledge that workplans will potentially need to change. Keep regular contact with your line manager to discuss this and how we can be more adaptive or flexible.

While it is likely that one person will be the main point of contact (leading the work) we should always aim to have at **least two Corra staff members** as described in our Safeguarding policy. It also aims to support relationship building, spot any triggers or concerns people are having, encourages more connections.

We must be aware that at any point a piece of work could trigger difficult memories or previous trauma both for the people who are participating and potentially Corra staff.

We never ask people to share anything they don't want to. Corra staff will never provide/ give counselling or other professional advice to people with lived expertise. Budget should be built into participatory programmes to offer access to professional advice or support if people feel they require this. If budget isn't available, you should raise this with your senior manager.

Corra staff should feel able to be an active listener in safe spaces. Corra will provide ongoing safeguarding training and developments around listening to all staff to help support them in this role. Additional dedicated trained on safeguarding in participatory approaches is being rolled out as part of the Corra wide approach to safeguarding training.

Supporting ourselves -

It is important to acknowledge that Corra staff may also be impacted by issues that emerge from lived experience work. Line managers should continue to support staff, provide check-in's after inputs or sessions, regular one to ones. All Corra staff have access to wellbeing support.

Corra will look at how it provides safe and supportive environments, and additional support for staff who bring their own lived experience to this type of work. This includes the People of Colour Group. For more information contact hr@corra.scot

Reach, relationships and supporting people (continued)

Maintaining relationships

We need to create ways to ensure regular, ongoing communication 'keeping in touch'. We need to **ask people** their preferred method (e.g. WhatsApp group, email, texting or phone call). It is important to schedule regular messages, so people know what's happening and we are here even if it is to say 'Hi'.

Ending work is as vital as starting. Being honest with people about role and purpose throughout the process can support natural endings.

Examples below can help.

- Data, stories and materials (information sharing should also be outlined from the start).
- How their input will be used.
- How long we plan to use it.
- What happens next and feedback loops.
- What happens if circumstances change.

At the end of any piece of work Corra should send a thank you card acknowledging a person's contribution and effort, regardless of payment.

As the programme is progressing connect with Learning and Development. It is important we build in learning and reflection sessions to gather insights from people's involvement and who will lead this. It may not always be the best option that those involved in supporting people deliver the reflection session.

If people have been involved in a group, ask if the group wants to stay in touch. This could be a catch-up or check-in with others to maintain connections (e.g. What's App, or a get together lunch).

It is important we follow all GDPR and Data Protection policies. This includes asking permission from people if they want any information shared (for example their name as a member of a decision-makers panel.

Some people will still want to be involved or stay connected to Corra. As we progress pieces of work have a conversation about potential options and how people would like to stay connected and what we can offer. This could include creating a blog/vlog on their experiences, providing an input events/conferences or inputs for other people with lived experience. We should also with check-in with the person who has a close relationship with the individual person before making any approach for someone to take on another piece of work/deliver an input.

It is important that people choose if and how they want to stay involved.

If we are asking people to do further work for Corra we need to consider if it is short-term, ongoing on a regular basis (and follow reimbursement processes).

If situations arise which may require a new or additional opportunities, you should also discuss with your line manager before pursuing.

Logistics and resourcing support

Creating the right space

Whether online or in person it is important that we ensure the space is **comfortable, welcoming and accessible**. We need to cover **all practicalities**. If meeting in person, spaces should be accessible, easy to get to and reflect the needs of the group/project. The practicalities of online connections are different. We need to ask people what works for them. For example, not everyone is comfortable with people seeing inside their home, ensure that people know they can leave their camera off.

Providing people with nice food is a **simple** but an **important** way to ensure that people are valued. This is easier when meeting in person. When meeting online we can accommodate refreshments (especially for all day events). If you are concerned about your budget, speak to your Line Manager.

We need to ask what works for people, and respond as flexibly as we can.

There are many situations where we need flexibility. This could include:

- People are anxious about meeting in person (online maybe the preference).
- People have caring responsibilities (online maybe the preference).
- People need to bring an interpreter or be accompanied by a supporter or Personal Assistant (accommodate for more people).
- People may have dietary requirements connected to their religion.
- People are travelling to the central belt and require overnight accommodation (when booking meetings thinking about when trains will depart not just arrive).
- If people are meeting in person have a check-in to make sure everyone is home safe (we may need to arrange taxis for people getting home in the evenings).

It is important wherever possible we meet people on days, times, places (both in person and online) that **work for them**. We also need to ensure that **agendas flex** and allow for plenty of short breaks for people to grab a coffee, stretch their legs etc.

Diversity, Equity and Inclusion and anti-racism

Corra is committed to working alongside a diverse range of people and communities, to making sure our work is inclusive and accommodates people's needs. We should take the lead and ask about any requirements or additional support. Don't assume people will come forward and share this.

Staff should have a one-to-one chat with each person to ask about their preferences, any additional help or requirements. This should be seen as ongoing and not a one-off.

Logistics and resourcing support (continued)

Examples of support that people may need:

- Provide (or purchase) a laptop/tablet to enable them to engage online/ access materials.
- Payment of broadband other ongoing digital costs.
- Cover any caring responsibility costs (e.g. childcare costs).
- Prepayment of any travel costs and where it is not possible staff should cover and claim back (e.g. parking).
- Covering interpreter costs.
- Reimburse payment for companion/ support worker to accompany the person.

If you are unsure if additional support needs can be accommodated (i.e. no budget) speak with your Line Manager to look at how it can be accommodated within the overall team budget (i.e. Grants or Place).

Wherever possible Corra will meet requests. If there are legitimate reasons why we are unable to, we must be **honest**, tell people why and explore alternative options.

Corra has accessibility guidance that must be followed throughout all of our work. This includes online and in person meetings/events and production of information.

Not all barriers are financial, some are physical, some may be hidden. Have an individual chat asking what support is needed.

For example, it might be to find a venue with a creche or ensure everything is on the ground level. One size will not fit all and we might not be able to accommodate all requests. Again, the importance of honesty of what we can/ are unable to accommodate, and to work with people around alternatives is vital.

Reimbursing People

It is important to understand Corra will not always need to pay people for their time.

We recognise and value the importance of the contribution people with lived experience bring to any element of our work.

However, it is also important to know there are several examples where people participate or work alongside us because it is part of their role, or they actively want to volunteer.

As a rule, Corra does not pay people who are part of an Advisory/Steering Group.

We will always offer to reimburse people with lived experience when:

- Inviting people to share their knowledge or experience to a specific focused piece of work and/or contribute at one of our events. For example, consulting on criteria, presenting at a Corra event.
- Asking people to do a job/role (which we normally recruit or pay for). For example, programme co-design, reviewing applications, evaluating programmes, action research.
- There is a financial barrier preventing people with lived experience (and it isn't part of their regular job/profession) in joining a Corra Steering Group or Advisory Group.

Whether one-off, short, focused or more regular Corra will compensate people for their time. The pay structure is as follows:

- One-off input (such as attending focus group). Small gift (either voucher or cash) up to £50.
- Short-term involvement in co-design of programmes, action research or funding decision-making panels. We will pay hr/daily rate.
- Regular activity which requires someone to contribute to the ongoing delivery and decision-making of a programme. We will pay hr/daily rate.

People who do not wish to be paid for work that can be compensated can choose for Corra to make a donation to a charity/voluntary organisation of their choice.

Corra will always pay in accordance with our salary scale or Real Living Wage. We will always endeavour to pay the equivalent going rate based on similar experience and skills. The day rate is the standard amount unless specific specialism is expected, and the person is being paid for this i.e. interpreter.

Reimbursing People (continued)

This guidance on reimbursing lived expertise does not apply to Corra staff. Any additional expenses incurred by staff doing this work are covered under Corra's expenses policies.

People who are regularly involved in lived expertise work have a choice of either a self-employed contract or be enrolled as sessional staff. It is important the individual chooses the right option for them, see below as a tool to guide people.

All contractual arrangements with Corra are legally binding documents. They outline the requirements for each person including details of what payment level, time commitment, their rights, Corra's responsibilities. In preparation of contracts and/or role it is important to make sure Corporate Services has all relevant information relating to the individual and role, including specification, time commitment, start and end dates.

Corra has legal and contractual responsibilities which stops us from providing people with advice on any potential tax or social security concern. We cannot advise people on any tax or benefits. If people need additional help we should signpost them to relevant agencies.

In certain circumstances you may feel there is a case for a permanent position. If a permanent position is to progress, this will need to meet Corra's operational and business needs and follow HR recruitment policy and process. This can only be approved by Senior Management Team.

It is important to acknowledge that some people may be unable to participate including voluntarily as it could result in benefit sanctions. It is also important to flag this to your Senior Manager/Head of Corporate Services about any alternative options.

Corra is a part of network in Scotland who are looking at improving payment practices and support of people who bring their lived expertise. This includes ways to share practices, training opportunities, compliance with regulations and how to change current systems for those in receipt of benefits. We will regularly share updates from this group and refresh our guidance to support practice of paying people.



Appendix 1 – Check List

Have we



- Clarity and purpose of meaningful involvement of people with lived experience
- Produced a plan including staff time and supportive budget
- Confirmed whether people will be reimbursed for their time
- Produced a 'need to know' information sheet for people
- Identified 'best approach' to reach people, including taking a DEI and anti-racist approach
- Created time to speak with people who are interested in being involved
- Agreed additional support costs with Line Manager/Corporate Services
- Provided people with necessary assistance to support participation
- Spoken to Manager about any sessional staff contracts
- Provided people with relevant paperwork 'if being reimbursed'
- Worked with people to develop language that will be used throughout
- Shared agreed language with Policy and Communication Team
- Established ground rules, meeting structures/times etc with people
- Identified and put in place additional training or skills needs for people
- Established preferred communication tools and contact with people
- Spoken with Line Manager/Corporate Services access to specialist/counselling support
- Worked with people on planed endings and ongoing involvement
- Worked with Learning and Development on reflection session with people



Appendix 2

Covers Corra's internal finance processes and so has not been included in the published version of this guidance

Appendix 3 – Additional guidance and resources

Note: the internal version of this guidance includes links to other relevant organisational policies and documents.

External Resources and Tools

- The Lived Experience Organisation
- Ladders of Participation
- Centre for Knowledge Equity
- Participatory Grant making Community
- Scottish Co-Production Network (SCDC)
- Social Action Inquiry in Scotland
- Who Has Gained Listening Fund Extract Date Right.pdf
- Listening Fund Toolkit (corra.scot)
- Scot Gov guidance
- SHRC research

About Corra Foundation

Corra Foundation exists to make a difference to the lives of people and communities. It works with others to encourage positive change, opportunity, fairness and growth of aspirations which improve quality of life. Corra wants to see a society in which people create positive change and enjoy fulfilling lives.

In 2020 Corra launched a ten-year strategy. It is long term because making a difference on the big challenges will take time. At its heart is the strong belief that when people find their voice, they unlock the power to make change happen.

Our ways of working

At Corra we have a set of principles that we strive to put into practice across our roles as an employer, independent funder, charity and partner, as well as in our influencing activity. We will:

- Listen and respond to people, communities and organisations and amplify voices that are less well heard – their wisdom is at the heart of Corra's approach.
- Build relationships, always working alongside others on the basis of shared power, mutual trust and shared learning.
- Pursue diversity, equity and inclusion (DEI), trying to challenge structural discrimination and contribute to radical shifts in the funding sector.
- Be an open, trusting and flexible grant maker.
- Ensure we contribute to tackling climate change, through our investments, operations and grant making and encouraging others to take action alongside us.
- Be bold, taking considered risks and supporting others to do the same.

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Corra Foundation
Office Suite 30 Pure Offices
4 Lochside Way
Edinburgh EH12 9DT
e: hello@corra.scot
t: **0131 444 4020**



www.corra.scot

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