

Thomas Jefferson Area Coalition for the Homeless

Compensation of Persons with Lived Expertise Guidance and Policy

last updated 12/4/20

Introduction

This memo outlines TJACH's minimum rates and guidelines for compensating persons with lived experience/expertise (PLE). The rates in this memo are a baseline and TJACH may pay more, but not less, whenever possible. TJACH will update this document at least annually and make available to CoC members.

Potential Engagements

Persons with lived expertise may be asked to work with TJACH in a number of different ways. These may include:

- Focus Group or interviews: One-time session to offer opinions, feedback, and experiences on a product, policy, document, or approach
- Committee Participation: Serving on a regularly scheduled committee or board.
- Speaking Engagement: One-time or series of virtual and/or in-person sessions such as a training, webinar, or conference including time to prepare and deliver the event.
- Internship or Fellowship: Paid work over a set time with TJACH. Typically has a defined set of projects, professional development opportunities, and supervision.
- Consulting Engagement: A subcontractor relationship for a project or team that includes a consulting contract, defined deliverables, and payment terms.

Key Financial and Programmatic Considerations

There are a couple key considerations that are important to remember when working with persons with lived experience/expertise. At all times, TJACH's work with persons with lived expertise should always be person-centered, strengths based and trauma-informed. Additionally, all projects involving persons with lived expertise should honor and value the input of lived experience, ensure people are paid and that the project has adequate funding for a person's time and involvement, as well as consideration of the power dynamics.

Programmatic:

- Include time in their planning to ensure people have appropriate context, clear instructions, access to participate (transportation, technology, etc.) and support throughout the engagement. This includes being flexible in meeting times/schedule and assuming that not everyone can meet from traditional 9am-5pm. Evening and weekend events may be necessary and should be provided as options.
- Ensure all persons asked to engage in work have access to the tools they need to do the work. This may include providing fare cards for public transportation or travel stipends, as well as asking about technology access.
- Talk with the participant and the project manager about how the PLE participant will want to be introduced in professional settings. Arrange in advance and ask the PLE for input into how their skills and talents are described, what is said about their history, and their skills, including what work they can or cannot do (technical writing vs offering insights or presentations)
- Provide support. Examples of support may include:
 - Engage in conversations with persons with lived expertise about what they might expect in the training, meetings, or conference settings they will likely encounter. Discuss the agenda and schedule and answer any applicable questions.
 - Ensure information provided is free of jargon and clearly written. If needed, provide a glossary or background documents as orientation.
 - Talk about who may be in a meeting, how others may present themselves, how the virtual environment works, as a way to give information about the business meeting environment to help inform how they decide to prepare themselves.

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- Be thoughtful of what the internal support structure will be and create orientation tools so people can understand and speak the same language of the broader work and field.
- Initiate conversations about their role in such convening, encourage them to feel comfortable asking questions and voicing opinions, and most importantly, make every effort to create a collaborative, open environment within the convening itself.
- Provide networking opportunities. If multiple persons with lived expertise attend a given event, it can be helpful to carve out specific time and space for them to meet with each other in formal/informal contexts to build relationships and community.
- Ensure there is a connection locally to services if the person expresses any immediate needs.
- In offices, create a sharing pantry where anyone can access food before or after meetings if they are hungry or need a snack between engagements.

Financial:

- Two key financial takeaways when engaging anyone in work, including persons with lived expertise
 1. If you are a consultant, you cannot be an intern, and vice versa. You can only be classified as ONE type of relationship with TJACH at a time. You cannot receive both a paycheck from TJACH (internship) and a check for consulting (consulting agreement).
 2. If you make over \$600 in the year, that is taxable income and TJACH will issue a 1099 tax form.
- Consultants: TJACH does not withdraw taxes for consultants but will issue a 1099 tax form to the consultant for them to file.
- Technology: TJACH can provide a computer or other technology as needed for interns or fellows for their time at TJACH. To receive equipment, complete the property request form. TJACH should not issue technology for consultants.
- Insurance: TJACH requires commercial general liability and worker's compensation insurance for all consultants. TJACH will waive the general liability requirements for persons with lived expertise who are individuals (not entities/companies). For worker's compensation, we must assess a small fee of .8%. For example, on a \$1000 contract the fee would be \$8. You should inform consultants of this consideration when negotiating their rate.
- Checks: If a person is paid via check, and does not have access to traditional banking for cashing or deposits, you may include the check cashing fee in the total amount that is paid to cover the cost. All funds are still subject to be taxable.
- Gift cards: When using gift cards, follow the process in Attachment A for processing and tracking. If possible, you should ask participants their preference for the type of gift card and make sure it can be used relatively easily by all participants.
- Travel: TJACH should cover all travel expenses in coordination with the person doing the travel. You have several options – TJACH can reimburse or provide in advance travel stipends, public transportation fare cards, or book travel as needed. TJACH should cover all expenses in coordination with the person doing the travel. Staff should budget accordingly for incidentals and provide advances if needed. When paying for travel, it's helpful to specifically talk with participants about per diem, ground transport (cabs, uber, bus) and ask if they would like these things paid in advance, with money in the hands of the person before their trip starts. This does take a little advance planning to coordinate a VISA card or check in advance, but is possible and should be a conversation with anyone we are asking to travel.
- Compensation affecting benefits: TJACH is not an expert in this area but is working to have both referral sources and learn more ourselves about these considerations.

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Minimum Payment Standards for TJACH

The following chart sets the minimum rates and eligible payment types for activities. Whenever using TJACH dollars, or as possible under grants and contracts, staff should follow this guideline. See attachment A for instructions on processing payments.

TJACH has set the **minimum rates** to utilize when we are the payer. These will be reviewed annually and are set in collaboration with our Speak Up and consumer group participants through focus group feedback.

Geographic differentials may increase the minimum outlined below. Unless the funding has different restrictions, when TJACH is proposing new work or paying from our own funds, it is the expectation that staff use the amounts outlined below as a starting point. **Please note the GREY boxes below are still being tested with focus groups but we did not want to hold up the rest of the document while we finalize. We expect to finalize by November.**

Type of Engagement	Purpose	Amounts (minimum)	Eligible Payment Types	
			Gift Card	Check/ACH
Focus Group or Interviews	Feedback on a specific item or project, policy, training. Informs and is integrated into the final design or product/initiative. Useful for surveying people with recent expertise or specific expertise in a system or community.	\$50 per hour \$75 per hour \$150 per hour \$200 flat fee Transportation reimbursement additional	x	x
Committee or Board Participation	Participate in a committee to inform, provide input, and make decisions	\$25 per hour \$30 per hour \$50 per hour Transportation reimbursement additional	x	x
Speaking Engagement	Share information with a wide audience through a conference, training, webinar, or meeting	\$100 per hour with prep Flat Fee	x	x
Internship/Fellowship	Provide professional development and project tasks to grow/advance someone's expertise and experience	\$25 per hour Or the minimum living wage for the geography, whichever is higher		X
Consulting on a Project	Provide expertise to a time limited engagement	Work with the person to establish a rate that reflects their expertise. Bands may include: \$50-\$75/hour \$75-125/hour \$125-160/hour		X

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Attachment A: Processing Payments

Check/ACH. Payment by check or ACH should be requested by submitting a check request. For honorariums, committee participation, speaking engagements, or focus groups, a memo detailing the event and total should be included as backup. TJACH will process the payment through our regular payment process. ACH is preferred while we are virtual due to COVID-19.

Gift Cards. Gift card policies are outlined in the 2020 Finance Manual. Key considerations include:

- Individual gift cards shall not exceed \$25.00 each without written approval from the Executive Director or Board Treasurer.
- TJACH will keep a log of all gift cards paid to individuals in accordance with this policy.
- Administration of gift cards during the COVID-19 pandemic is outlined below.

Providing Gift Cards Virtually: Temporary Gift Card Process (During COVID-19)

1. Determine what type of gift card you will issue and the value of each card.
2. Receive approval from TJACH Executive Director for the proposed project, amounts, and distribution.
3. When setting up your event, let each recipient know the process requires us confirming an email address or mailing address to receive payment. Ask each recipient if they can receive a digital gift card. If not, they will receive it by mail.
4. Contact TJACH Executive Director and ask for assistance prior to your meeting date. Detail the following in an email:
 - Date of the event and the amount of each gift card.
 - Billing code for the gift cards and short description of purpose
 - If you would like gift cards mailed or emailed
5. Hold your event.
 - Maintain sign in and sign out lists. Our current policy includes having a sign out sheet for all gift cards distributed. For virtual meetings, record the beginning and end of the call and do a verbal roll call. Keep a written list of attendees. If using an online platform (Teams), you can also save the attendee list as your record.
 - Confirm the final roster for gift card distribution. If using virtual gift cards: Include a roster with each attendee name and email address. If mailing a gift card: Include a roster with the name, mailing address, phone number.
6. Once participation is confirmed, TJACH Executive Director will purchase gift cards via the appropriate website and distribute them digitally via email to recipient or through the mail.
7. Once the stipends are received, they recipients should call or email TJACH Executive Director or designee to confirm receipt, date and amount of stipend.
8. TJACH will maintain an electronic list of all stipends (along with a file of all outgoing stipend documents) that were approved by the Executive Director.
9. TJACH will return to its regular processes once we resume in person meetings.