

# Terms of Office and Numbers of Representatives

Feedback gained from the consultation on terms of office very much reflected the background of the people who responded. There were a full range of opinions given.

The main concerns expressed, were the need to engage and recruit people to secure a diversity of views, and the need to ensure fair access to opportunities to enable people to participate.

For representatives in existing roles, the emphasis is on the effectiveness of representation and fairness and parity of terms with other partners around the table.

The consultation also highlighted challenges in recruiting new representatives to replace those stepping down, alongside questions about how to retain particularly effective representatives who bring experience and a long-term vision to group work. It was also noted that turnover in representative roles is common and that levels of effectiveness vary between individuals.

One view expressed was that we often don't hear from all representatives in a group, which can be due to a few people dominating meetings. However, although this may be the case it is also true that there are differences in experience, confidence and verbal skills. Often group members remain silent because their opinions have already been expressed by the more verbal members of the group. Skilled chairing ensures that everyone has the opportunity to contribute (see Guide to Chairing Co Productive Meetings document)

Some people raised concerns about the stamina required for representative roles, noting that completing a full term of office is not compulsory. While some service users and carers are able to sustain longer-term involvement, others may prefer shorter commitments.

It was suggested that terms of office do not need to be uniform across all areas; however, representatives generally seek parity with neighbouring areas, particularly where conditions of involvement are more favourable. Establishing a minimum standard across Wales would therefore be beneficial.

One person addressed the length of terms of office which suggested that continuing for a second term would depend on a satisfactory review at the end of their first term. Whilst this might help to support the effectiveness of the representative team, there are also issues of the stress of facing a review and the emotional consequences if their term of office is not renewed.

There is a completely separate discussion to be had about whether people should be allowed to be representatives regardless of their performance. However, it is a necessary criterion for initial appointment.

These factors need to be balanced through a combination of terms of office and numbers of representatives.

At present membership terms are decided by third sector organisations or partnerships locally, which has led to a lack of consistency and transparency across the different parts of Wales. At present the terms of office for representatives can range from being very short, to being as long as the individual wants to serve.

The long-term membership approach was a result of the fact that previously some other Board members had no terms of office limitations. It was felt there is a need for equality of tenure for all. Salaried Partnership Board board members and service user and carer members should have the same terms of office.

One contributor felt that time since using services was a more important factor regarding when someone should stop their involvement. The majority of areas specified that the person should have used mental health services within 5 years.

As a general rule, terms of office should reflect the complexity of the work and the frequency of meetings. Representatives need enough time to:-

- Get used to the culture,
- To learn the nature of the work,
- To develop good working relationships with partners around the table,
- To become effective,
- And to pass on their learning to new representatives before they leave.

It has to be recognised that, unlike other partners around the table, service users and carers are not emersed in this environment full time and cannot be expected to be effective from their first meeting.

Succession planning will require the overlap of terms of office to allow new representatives to settle into the organisation before the experienced representatives leave.

It seems reasonable to expect the first term to include at least:

- 3 meetings for a representative to get used to a new role

- 3 meetings to become effective
- 3 meetings to work at peak performance, and
- 3 meetings to pass on their knowledge to new recruits.

If representatives serve a minimum of 2 terms, they will be able to perform at a higher level for longer. For service users and carers, and for organisations, effective contribution and representation is key to success.

Restricted terms of office will require larger numbers of representatives over time but there is a limited pool of people willing and able to take on this work. More people might be available if people were offered rewards for these roles (Reward and Recognition document is available on request).

People invest considerable time and effort into becoming good at the representative role. There is a tendency for new representatives to be offered numerous opportunities which can involve commitment and hard work, only to find this reduces over time when new reps are recruited which can leave people feeling overlooked and undervalued.

They may quickly be labelled as being one of the familiar faces at multiple meetings and events. This approach undermines the motivation to become a representative particularly if the experience feels unfair or underappreciated. Commitment should be rewarded, rather than people feeling demotivated which results in losing talent from the system.

There can be a fear that people who stay on boards or committees for a long time lose the independence of their voice, as a result of developing loyalties towards other individuals on decision-making groups. Experience shows that in fact service users and carers who effectively and constructively challenge, never lose their background perspective, rarely lose the passion for their role and continue to fairly represent and advocate for their community.

It is important that terms of office are set out in the local engagement and recruitment strategy, so that the policy is transparent. It is both essential and considerate to ensure that the end of a term of office is clearly set out in advance, so people know what to expect.

Where terms of office are limited there needs to be a fair and dignified exit strategy. It is recommended that retired representatives are offered the opportunity to mentor, support and supervise acting representatives, and where acting representatives cannot attend meetings that they act as deputies. They could also be offered

other representative roles on committees and groups not traditionally attended by representatives.

## Recommendations

### Minimum standard

- All representatives will have used services or experienced mental health issues within the last 5 years, or they have cared for someone who has done so.
- For meetings which occur up to 6 times a year – a minimum length of term of 3 years with at least one more possible term of service
- For meetings every month or 6 weeks – a minimum length of term of two years with at least one more possible term of service.
- A notice period of 6 months or at least 2 meetings (whichever is longer) is given to a representative if their term of office is to end.
- A team of representatives is never replaced, at the same time, to ensure the transfer of knowledge and expertise to incoming representatives. This ensures that there are always experienced and effective representatives on the Board, committee or group. There must be at least 3 meetings overlap between incoming and out-going representatives.
- Representatives have the option of resigning at any time.

### Gold standard

- The same terms of office as served by other members of the committee or group

### Number of representatives

Group dynamics determine that there needs to be at least two people from a minority to affect the groups' culture and decisions. Hence as a general principle there should be at least 2 service users and 2 carers in every decision-making group.

In addition, to address concerns about the range of perspectives, the more voices that can be heard around the table the better. Research has also shown that decision-makers have a tendency to give little credibility to a single service user or carer voice and are more likely to take contributions seriously if they are supported by a group.

A quote from one workshop participant supports this idea – “remember that one person’s voice does not represent ‘service users’ as a category”. Experience of having contributions written off in this way as ‘just your individual opinion’ is common amongst representatives who have served on decision-making groups alone.

Whilst the argument was made that professional groups will have only one person at meetings and are responsible for getting the views of their colleagues to inform their work, service users and carers don’t yet have the credibility or status of professionals and are also not a homogenous group. Although this is not an ideal situation regarding equality in decision-making, it is a reality that needs to be taken into account.

Given that service users and carers are often unable to attend groups due to ill health or caring responsibilities, the most effective approach is to have a pool, or team of representatives who support each other and share the work out between them to ensure that the minimum quota of representatives is always present at meetings. This, combined with longer terms of office, will give the variety of perspectives desired by partners, ensure the presence of effective representation desired by service users and carers and increase the opportunities for involvement desired by people who have the ambition to be involved going forward.

For smaller task and finish groups fewer members may be necessary, but the team approach can still work well.

One example of such an approach is to have an appointee who is supported by a ‘buddy’, who takes over when the appointee is unavailable. Having more service users and carers around the table helps to clarify where views align or differ. It will tend to lead to more creative contributions and a more effective reality check of how the decision-making group’s work is affecting/ influencing/ impacting service delivery.

### **Minimum standard**

- At least 2 service users and 2 carers are appointed as representatives to each board or committee.
- As a general principle any long-term group which makes substantial decisions such as Boards, and influential committees, should meet this minimum number.

### **Gold standard**

- Where there are geographical and administrative differences in service between different parts of the organisation e.g. health board or local authority area it is preferable to have representatives from each area.

- Enough representatives will be appointed to ensure that, given the high absence rate due to illness or caring responsibilities, there will always be at least 2 service users and 2 carers in attendance at the Board.
- More than 2 service users and 2 carers are appointed to maximise the diversity of voices and to ensure that the lived/ living experience of the representatives is relevant to the decisions being made.
- Best practice ensures there are enough service users and carers to have an equal voice to professional decision-makers where majority voting is being used. This would imply a membership of at least 50% service users and carers.

## Recommendations

- It is recommended that organisations who meet the minimum standards for terms of office and numbers of representatives in decision-making groups aspire towards the Gold standard.
- These conditions can be exceeded locally but not reduced.
- For transparency and fairness, the number of representatives and their terms of office will be decided through a co-produced engagement strategy for the organisation or partnership
- There is a fair and dignified exit strategy, when a representative's term of office comes to an end, which may include keeping them on to mentor, and supervise newly appointed representatives.