



BUCKINGHAMSHIRE
NEW UNIVERSITY

EST. 1891



Experts by Experience Handbook 25/26

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Introduction and Welcome

Welcome to our Experts by Experience Handbook. We believe that the involvement of Experts by Experience (referred to as Experts for the remainder of this document) is crucial to the development and quality of our programmes and research. Our University-wide Experts by Experience Policy ensures that we support, advocate, and continually improve our practices to be fair, consistent, and of high quality and above all, meaningful.

We define Experts as people with lived experience and/or carers of individuals who have first-hand experience of physical and/or mental health, social or cognitive challenges or needs (e.g. patient, student) and/or the use of services in the public or industry sector (e.g. prisoner, passenger). These terms are used to differentiate from others who may have experience of working professionally with individuals with challenges or needs but have not personally lived through them.

The handbook is designed for both potential and actual Experts who work with BNU. It also serves as a handy reference for academics, other staff and learners. It aims to provide all the information you need about becoming an Expert, the support we offer, and what you can expect from your involvement. This includes information and guidance on:

- The University
- The roles and responsibilities of staff.
- The role of an Expert, the activities involved, and the support provided.
- Processes for appointment, communication, reward, and recognition.
- Mechanisms for feedback, evaluation, and celebration.
- Visiting the University and useful contacts.
- A glossary explaining different terms and abbreviations.

As an Expert, you bring a unique perspective to our University, informed by your real-world and personal experiences. Your contributions will help to ensure that our curricula are current, relevant and responsive to the needs of the people we serve. We are grateful for your participation and look forward to working with you.

About us

Our University - BNU

Welcome to our University, a place that's been changing lives for over 130 years. We do this through teaching, research, and helping the environment and people around us. Our campuses are safe and welcoming, where everyone can be themselves. We celebrate all kinds of people and offer an education that works for everyone, giving people skills for life. We're proud to help our learners be the best they can be.

BNU is currently made up of 3 colleges. They mix classroom and online learning with hands-on experience, including work placements. This is to inspire, challenge, and help learners reach their career goals. You can find out more about what BNU offers, including special areas and programmes, on our College and department [web pages](#). Our academics are professionals from different industries, making sure learners are ready for their future careers. You can find out more about our academics on [our staff profiles page](#).

At BNU, we do research and share knowledge based on professional practice or educational needs. People like you, who have experience in these areas, are at the heart of this work. You can find out more on our [research and projects page](#). This shows recent work from different subjects, as well as our Research Notes publication and research and impact journal.

We're always open to new ideas and better ways of doing things. From inspiring teaching to looking after our learners, staff, and community, we're committed to making a difference. We support lots of jobs in the region and important local industries, like the health and social care sector.

For further details about BNU check out the website here www.bnu.ac.uk

Expert Lead

The Expert by Experience Lead (referred to as Expert Lead for the remainder of this document) is your main helper at the College you're mostly connected with. If you have any questions or if something is bothering you, please reach out to your Expert Lead first. If you are unsure who they are please look at our webpage <https://www.bucks.ac.uk/experts-experience> They're there to help you!

Getting started

Before you begin working with us, there are a few things you need to know.

Getting to Know You and Getting to Know Us

We'll start by asking you to share a bit about yourself via the *Experts by Experience 'About Me' Form* (Appendix 1). This will be followed by an informal chat with an Expert Lead, and another Expert, if possible, to assess your fit/suitability for the role. We'll explore your background and interests to identify which programmes and activities might be a good match for both you and us. Dependent on your previous experiences or if you wish to do so, we will encourage you to visit BNU and observe activities and shadow other Experts and academics, so you get a feel for what it means to be an Expert.

Existing Connections

If you're already connected with an external organisation or charity such as NHS Patient Experience Group, Maternity Voice Partnership, or Carers Bucks, we'll arrange an informal meeting to discuss what being an Expert at BNU entails and how you can contribute.

Joining BNU (onboarding)

If you're successful and still wish to become a BNU Expert, we will support you, or if you are under 18 years old, an individual with parental responsibility, to complete an *Experts by Experience Agreement Form* (Appendix 2). This is a non-legally binding agreement outlining mutual expectations, your experience, and what areas of work you have agreed you would like to be involved with. You'll be asked to provide consent for recording, storing and sharing your personal information and you will be advised about the Expert types, and which is most suited to you. They are:

- [Expert by Experience – Volunteer](#)
- [Expert by Experience – Guest Speaker](#)
- [Expert by Experience – Consultant](#)
- [Expert by Experience – Oliver McGowan Co-Trainer](#)
- [Expert by Experience – Youth](#)

Your Expert Lead will then complete an *Expert by Experience Schedule* as appropriate to each Expert type and send this to our People Team (HR) department.

Right to Work Check, Bank Details and New Starter Checklist - Before you can begin any work or claim any payment or reimbursement, you must complete a Right to Work in the UK check and provide your bank details and HMRC New Starter Checklist (Appendix 3).

This applies to:

- Expert by Experience – Volunteer (if claiming travel or parking reimbursement)
- Expert by Experience – Guest Speaker
- Expert by Experience – Consultant
- Expert by Experience – Oliver McGowan Co-Trainer

You cannot start any activity or be paid until these checks have been completed and verified by the People Team.

- If you are an Expert by Experience – Oliver McGowan Co-Trainer, your Expert Lead will complete these with you.
- If you are an Expert by Experience – Consultant, Guest Speaker, or Volunteer, the People Team will contact you directly. Your Expert Lead can also help you if needed.

You can contact the People Team at people@bnu.ac.uk and find acceptable Right to Work documents at www.gov.uk/prove-right-to-work.

Disclosure and Barring Service (DBS) Check - In most cases, Experts by Experience do not require a DBS check, as you will not be on campus unaccompanied. However, on rare occasions, where it is assessed your input would mean you would be unaccompanied on campus or working directly with vulnerable individuals, a DBS check will be required. In such cases:

- Your Expert Lead will inform you if a DBS check is necessary.
- A member of the People Team will contact you to initiate the process.
- You must not begin any work until the DBS check has been completed and cleared.
- Please note that the university cannot control the timeframe for DBS processing, so this may affect your start date.

Contracts - A contract will be issued to an Expert by Experience – Consultant and an Expert by Experience - Oliver McGowan Co-Trainer, but only after all applicable pre-employment checks have been completed and are satisfactory.

Business Connect – All Experts (except Expert by Experience – Youth and Expert by Experience – Guest Speaker) will be set up on Business Connect, our HR information system, where you will submit reimbursement claims for travel and parking or timesheets for hours worked.

Orientation

Once you have completed the above requirements, any checks are cleared and you've received a contract appropriate to your Expert type, your Expert Lead will invite you to attend an orientation session. Here, you'll learn more about your role and how you can make a difference. They will also advise you about induction and mandatory training requirements.

Observation and Shadowing

We'll also invite you to observe activities and shadow other Experts and academics. We understand that being an Expert may be challenging, so we offer a variety of support and resources to help you thrive. More details can be found in the Information, Support and Resources section.

Active Participation

When you feel ready and confident, we'll add you to our BNU Expert database which allows relevant staff members to contact and book you as needed, and we'll support you in working alongside a staff member in the areas you had previously identified with your Expert Lead.

Feedback and Development

Based on feedback from learners and academics, we may suggest additional or different opportunities or provide advice on how to improve the overall experience. If there are still concerns after making adjustments, we'll discuss your future in the role.

Leaving the role

Experts can step down at any time, for any reason. All who do will be asked to provide the Experts Lead with information that led to their decision. This will be gathered, alongside other feedback, for evaluation purposes towards the end of the academic year in preparation for the new academic year.

- As an [Expert by Experience – Volunteer](#), [Expert by Experience – Guest Speaker](#) or [Expert by Experience – Youth](#), you can stand down with immediate effect.
- As an [Expert by Experience – Consultant](#) or [Expert by Experience – Oliver McGowan Co-Trainer](#), please refer to your contract.

Communication and Data Management

At BNU, we maintain a comprehensive Expert database, which is updated as needed by the respective Expert Leads. This database includes essential details such as contact information, experiences, preferences, interests, and their relevance to various programmes and activities. It also supports requests, bookings, and the processes for rewards and recognition.

This database is housed within a shared MS Team space at the University, with access limited to specific individuals and groups. These include academics, the People Team and recruitment personnel, and relevant administrators involved in University Colleges, committees, and panels. We always adhere to GDPR

requirements as outlined in the Information Security Policy and Data Protection Policy.

Each Expert Lead is responsible for regular communication with each Expert, providing updates about the University, their College, the cluster of programmes or disciplines, as well as Expert work.

The University wants to make sure that the local population is well-represented among our Experts. Our goal is to include a diverse group that reflects different backgrounds in each discipline or programme. We will take positive steps to fill any gaps we find, actively supporting diverse recruitment. We'll gather information about equality, following BNU rules, to make sure we're actively including all kinds of voices and experiences. This commitment is all about making sure everyone feels welcome and that our academic environment stays up-to-date and student learning remains relevant.

Expert by Experience Strategy Group

Your involvement is crucial and should be guided by your insights, as well as the learners and academics you work with. Once a year, during the summer term a strategy group meets to discuss and review the processes and activities related to your work. This group is led by the Head of Teaching and Learning Excellence and includes the Lead for Quality Assurance and Enhancement (Health and Social Care), a member of the College leadership team, each Experts Lead, a variety of Experts from different clusters, programmes, and disciplines, and key staff and learners.

This annual meeting is an opportunity to ensure that your involvement is safe, effective and well-managed. It's also a chance to review related Key Performance Indicators (KPIs) and the Annual Experience Survey results and share best practices across the University. Your contributions to this meeting are invaluable in helping us continually improve and enhance our practices. Refreshments will be provided.

The Expert Role and Responsibilities

Experts as a collective across BNU represent a range of knowledge, skills and personal experiences. You will come from a variety of backgrounds bringing unique perspectives, insights and expertise that will inform our policy, teaching, learning and assessment content and practice as well as research and knowledge exchange. We work closely with key public, private, independent and voluntary organisations such as NHS Trust Patient Experience Groups, Maternity Voice Partnership or Carers Bucks and you may also be affiliated with these.

Your role is essential in shaping the education of future professionals. Your unique insights into the lived experience of using specific services and having particular needs will help learners to develop a customer or person-centred approach to their work.

During your induction as an Expert at BNU, we'll introduce you to our culture and expectations. You'll also get to know the BNU Code of Conduct, which outlines the values and behaviours we expect all University employees, including Experts, to follow. You will find this document here:

<https://www.bucks.ac.uk/sites/default/files/202311/Staff%20Code%20of%20Conduct.pdf>

If there's a concern that this code has been breached, the relevant Expert Lead will look into it. In some cases, it might be necessary for an Expert to step down from their role.

Expert Activities

As an Expert, you can be involved in a variety of activities across the learner journey. As previously discussed, when you join, your Expert Lead will introduce you to these activities, and you'll be matched to roles based on your preferences, interests, and previous experience. Please note that some roles may require additional briefing and training, which we'll provide as needed.

Programme Design, Development, Course Amendment and Evaluation

You're encouraged to get involved in new programme development, course amendment and evaluation. This is your chance to influence the design, content and assessment of the programme.

Open Days

You might be invited to participate in open days for prospective learners. Your involvement could range from sharing your personal experiences and insights to assisting in teaching and learning demonstrations. This not only enriches the open-day experience for potential learners but also allows you to contribute to shaping the future learning environment.

Learner Recruitment and Selection

You'll have the opportunity to be involved in learner recruitment and selection activities. This includes reviewing related processes, designing selection activities and interview questions, and even participating in the interview process with applicants.

Staff Recruitment and Selection

You may have the opportunity to participate in staff recruitment and selection procedures. This could involve creating selection tasks and interview questions or participating in the interview process with potential staff members. To note - you must have completed the relevant staff recruitment training to be able to be a member of a staff interview panel, your Expert Lead will advise you accordingly.

Teaching and Learning

You'll be invited to co-produce, co-facilitate and participate in educational activities. This could be in-person or virtually and could involve sharing your lived experience with groups of learners and participating in simulated learning, role-playing a service user or carer.

Oliver McGowan Mandatory Training

You will co-deliver the Oliver McGowan training package with a Lead Facilitator to different groups across the university. This will be in person and will involve sharing your lived experience with the group of learners.

Assessment

You may be invited to attend and participate in learner assessments. This could include supporting presentations and examinations, or through role play as part of practical exams, such as Objective Structured Clinical Examinations (OSCEs) or viva voce (often shortened to viva) which is an oral test. You may also support learners within placements or work-based learning activities by providing feedback and completing relevant sections of learner portfolios and/or assessment documents.

Working Groups and Panels

You'll be invited to sit on various panels and working groups as appropriate. One area of consistent input will be representing the service user or carer on Fitness to Practise panels.

- **Fitness to Practise:** The University offers several programmes which entitle successful graduates to become registered members of regulated professions. The assessment of a student's fitness to practise has a three-fold purpose: protecting the public, upholding professional standards, and contributing to the maintenance of the reputation of the profession.

Research

You have a valuable role to play in research. This may involve the design and development of research activities.

Remember, your involvement is crucial to us, and we value your contributions. We're here to support you every step of the way.

Staff roles, responsibilities and contact details

The following are a set of roles that are found on programmes offered by the University.

Expert Lead

This person is your main contact. They carefully follow the internal Expert by Experience Process to ensure you are onboarded correctly and then work hard to make sure everyone feels included, supported and that things run smoothly.

Discipline or Cluster Lead

This person is in charge of a specific subject or area of study. They create programmes, build relationships with partners, and make sure their subject is high quality and relevant. For example, they might oversee all Nursing Programmes. They might also be a Programme Lead.

Programme Lead

Sometimes known as the Course Lead, this person is responsible for a specific programme of study. For example, they might be in charge of the BSc Physiotherapy programme.

Module Lead

A programme is made up of different parts called modules. The Module Leads take care of these parts. They plan teaching, learning and assessments, decide when Experts are needed, and make sure support is provided. They also help learners and Experts evaluate their experience. If you have any issues or concerns about a module, you can talk to the Module Lead or Expert Lead.

Technician

Technicians are here to help learners, academics and Experts with any technical parts of the programme. This could include using props for role-play activities.

Involvement Reward and Recognition

At BNU, we value the contributions of our Experts by Experience (Experts). We believe that no Expert, whether an adult, child or young person, should face any disadvantage due to their involvement. To ensure this, and to encourage a diverse group of Experts, we offer different reward and recognition options:

- **Expert by Experience - Volunteer:** You will be recognised for your contributions. While there is no financial reward, you can choose to claim reimbursement for reasonable expenses as outlined below if you wish to.
- **Expert by Experience – Guest Speaker:** You will be recognised and financially rewarded for your contributions, but there are limitations to how often you can contribute.
- **Expert by Experience – Consultant:** You will have a contract and will be recognised and financially rewarded for your contributions.
- **Expert by Experience - Oliver McGowan Co-Trainer:** You will have a contract and will be recognised and financially rewarded for your contributions.
- **Expert by Experience – Youth:** You will be recognised and rewarded for your contributions as appropriate.

Important Information

- For any Expert role we cannot guarantee involvement opportunities.
- It's important to submit your claims for expenses or payment within 1 month of the activity to ensure receipt. We advise all Experts to keep a record of all claims made.
- Receiving payment could potentially affect your benefits and tax status. BNU cannot offer personal advice regarding tax, national insurance (NI) liability, or welfare or disability benefits. The *Department for Work and Pension Permitted Work Factsheet* (Appendix 4) outlines the details, and the *Department for Work and Pension Permitted Work Form* called the *PW1 Form* (Appendix 5) must be completed before you claim. We recommend seeking independent professional advice to ensure your involvement does not negatively impact your income or benefits. You can find further information here <https://www.gov.uk/government/publications/employment-and-support-allowance-permitted-work-form/permited-work-factsheet>

For advice, you can contact:

- **Citizens Advice Bureau (CAB):** Find your local branch here <https://www.citizensadvice.org.uk/> or call 0800 144 8848.
- **Job Centre Plus:** Find contact details and your nearest office here <https://www.gov.uk/contact-jobcentre-plus>
- **Pension Service:** Find your local office here www.gov.uk/find-pension-centre or call 0800 731 0469.
- **Disability Rights UK:** A helpful online source of information and advice on benefits. Visit their website here <https://www.disabilityrightsuk.org/>

Expert by Experience Volunteers

Experts by Experience (Expert) - Volunteers generously offer their time without a contract. We appreciate their contributions and offer reimbursements for reasonable travel and parking expenses, if not provided by the University. We may also cover non-standard expenses when necessary for the Expert.

Reimbursement for Reasonable Expenses

- **Travel and Parking Expenses:** We aim to provide the most economical, safe, and practical transport options.
 - **Mileage:** Reimbursed at a rate of 45p per mile. Claims should be for travel to and from home and a BNU campus.
 - **Parking:** If an Expert Lead or staff member cannot secure a disabled or visitor space on campus, parking charges will be reimbursed. Please include proof of purchase when claiming. Please note, that BNU does not cover or waive any parking fines, whether incurred on or off campus.
 - **Public Transport:** Standard class fares for train, tube, or bus will be reimbursed. Please include proof of purchase when claiming.
 - **Taxis:** These are covered only if required due to individual circumstances and/or reasonable adjustments. Please include proof of purchase when claiming.
- **Non-Standard Expenses** Costs for dependent care, personal assistants/carers, and interpreters may also be reimbursed when necessary for the Expert, and they fall outside of the support that the Expert receives on a usual day-to-day basis. These must be discussed on a case-by-case basis with the Expert Lead and agreed upon by the Associate Dean for External Engagement (College of Health and Society) or Associate Dean Education (Colleges of Creative Arts, Technology and Engineering or Leadership of Innovation) before a claim is made.

Process for Claiming

- If you, as an Expert Volunteer, you plan to claim reimbursement for travel and parking expenses, you can do so once the Right to Work check, *Bank Details and HMRC New Starter Checklist* have been completed (Appendix 3) as part of your onboarding activities.
- All claims are made via Business Connect. *Expenses Guidance* can be found on BNU's intranet BEN <https://ben.oak.com/Home/Index/1fe21aac-999c-4852-aa9a-176a35061611> or in Appendix 6.
- You will also find the Expense Timetable on BEN using the same link.
- The reimbursement payment will be made on the last working day of the month subject to timely approval by your Expert Lead. Please ensure your claims are submitted promptly to avoid any delays.

- If you have problems with internet access or require support with using our online system Business Connect, please inform your Expert Lead so support or alternative arrangements can be discussed.

Expert by Experience Guest Speakers

Experts by Experience (Expert) – Guest Speakers are limited to undertaking a maximum of 3 sessions per academic term, irrespective of hours, and are recognised and rewarded. Payment rates are fair, reflecting the type of activity being undertaken, and align with the Real Living Wage (RLW) for London. These rates will increase when the RLW for London rises. The rates apply to all campuses, including online activities. We also offer reimbursements for reasonable travel and parking expenses, if not provided by the University. We may also cover non-standard expenses when necessary for the Expert.

Reimbursement for Reasonable Expenses

- **Travel and Parking Expenses:** We aim to provide the most economical, safe, and practical transport options.
 - **Mileage:** Reimbursed at a rate of 45p per mile. Claims should be for travel to and from home and a BNU campus.
 - **Parking:** If an Expert Lead or staff member cannot secure a disabled or visitor space on campus, parking charges will be reimbursed. Please include proof of purchase when claiming. Please note, that BNU does not cover or waive any parking fines, whether incurred on or off campus.
 - **Public Transport:** Standard class fares for train, tube, or bus will be reimbursed. Please include proof of purchase when claiming.
 - **Taxis:** These are covered only if required due to individual circumstances and/or reasonable adjustments. Please include proof of purchase when claiming.
- **Non-Standard Expenses** Costs for dependent care, personal assistants/carers, and interpreters may also be reimbursed when necessary for the Expert, and they fall outside of the support that the Expert receives on a usual day-to-day basis. These must be discussed on a case-by-case basis with the Expert Lead and agreed upon by the Associate Dean for External Engagement (College of Health and Society) or Associate Dean Education (Colleges of Creative Arts, Technology and Engineering or Leadership of Innovation) before a claim is made.

Expert by Experience Guest Speaker Agreement

Before you start any involvement work, we will require you to have completed a *Guest Speaker Agreement* (Appendix 11) which involves you having to confirm that you have a Right to Work in the UK. Once this has been checked by your Expert

Lead, who will also send this to the Experts by Experience (EBE) Finance Team via payroll, they will issue you with a 'Purchase Order' (PO) for your services. You can claim payment and expenses via an *Expert by Experience Guest Speaker Invoice* (Appendix 12) once relevant activities have been completed which should align with the PO raised. This must be completed and returned to EbE.invoices@bnu.ac.uk

Please Note:

- Mandatory training as required, part of your induction, can be claimed for on top of the maximum 3 sessions per academic term. You can claim for up to one day's pay.
- Informal virtual catchups or keeping-in-touch meetings with Expert buddies, Expert Leads, or BNU staff cannot be claimed.
- If BNU needs to cancel an activity at short notice (within 3 days of it taking place) that you are booked for, and you have made pre-paid travel arrangements, these can be reimbursed if claimed with proof of payment. If you attend an activity and it does not go ahead, you may claim your travel expenses and the equivalent of 1 hour of your payment rate.

Payment

Reward via payment is offered as outlined below. However, there are some occasions when it is not appropriate to offer payment. Typical exceptions include:

- Receiving payment or reimbursement from another organisation (e.g., Carers Bucks)
- Attending a learner clinic (e.g., sports therapy) as a service recipient
- Participating in a conference
- Being a research participant.

Payment Tariff

Guest Speaker Rate

You are paid a flat rate and currently based on the *London Real Living Wage* rate. Either:

- Half day (up to a maximum of 3 hours): the equivalent of *3 hours* at the current London Real Living Wage rate
- Full day (for 3 hours – 6 hours maximum): the equivalent of *6 hours* at the current London Real Living Wage rate

The latest rate can be found on the [Living Wage Foundation website](#).

Expert by Experience Consultants

Expert by Experience (Expert) - Consultants are placed on an atypical contract, undertake over 3 sessions per academic term, and paid an hourly rate. This rate is fair, reflecting the type of activity being undertaken, and align with the Real Living Wage (RLW) for London. The rate will increase when the RLW for London rises. The

rate applies to all campuses, including online activities. You will receive an ID badge, an email account and access to the University IT Systems.

Pre-Employment Checks

Before you start any involvement work, we need to have conducted a Right to Work in the UK check as outlined above as your contract will be issued only after these have been completed and are satisfactory. You claim payment once the *Bank Details and HMRC New Starter Checklist* has been completed (Appendix 3) and returned to the People Team as part of your onboarding activities.

Please Note:

- Mandatory training, part of your induction, can be claimed for up to 6 hours at the Level 1 rate.
- Informal virtual catchups or keeping-in-touch meetings with Expert buddies, Expert Leads, or BNU staff cannot be claimed.
- If BNU needs to cancel an activity at short notice (within 3 days of it taking place) that you are booked for, and you have made pre-paid travel arrangements, these can be reimbursed if claimed with proof of payment. If you attend an activity and it does not go ahead, you may claim your travel expenses and 1 hour of the Level 1 rate.

Payment

Reward via payment is offered as outlined below. However, there are some occasions when it is not appropriate to offer payment. Typical exceptions include:

- Receiving payment or reimbursement from another organisation (e.g., Carers Bucks)
- Attending a learner clinic (e.g., sports therapy) as a service recipient
- Participating in a conference
- Being a research participant.

If Experts or staff are unsure where a proposed involvement activity fits within the tariff below, they should consult with their Expert Lead.

Payment Tariff

Consultant Rate

You are paid an hourly rate. This is set at E20 BNU salary scale. Currently this is £15.38 per hour and is equitable to comparable work in the NHS. Any independent preparation time required for activities you are involved in can also be claimed for, but this must be agreed with your Expert Lead in advance.

Process for Claiming

- All timesheets (claims for payment for hours worked) are made via Business Connect.
- If you need to travel to another campus than your base as indicated on your contract, you may claim any additional mileage at 45p per mile. Your Expert Lead will be able to advise you.
- *Timesheet Guidance and Expenses Guidance* can be found on BNU's intranet BEN here: <https://ben.oak.com/Home/Index/1fe21aac-999c-4852-aa9a-176a35061611> or in Appendix 7 and 6.
- You will also find the Expense Timetable on BEN using the same link.
- All payments will be made on the last working day of the month subject to timely approval by your Expert Lead. Please ensure your timesheet and claims are submitted promptly to avoid any delays.
- If you have problems with internet access or require support with utilising our online system Business Connect, please inform your Expert Lead so support or alternative arrangements can be discussed.

Expert by Experience - Oliver McGowan Co-Trainer

The Oliver McGowan Mandatory Training programme is the preferred training package for NHS England in Learning Disabilities and Autism, as described in the *Health and Care Act 2022*. The course requires co-delivery with Experts by Experience with a Learning Disability and/or Autism as part of a trio, where the third person is the facilitator. Payment is set out as below and applies to all campuses, including online activities. You will receive an ID badge, an email account and access to the University IT Systems.

Pre-Employment Checks

Before you start any involvement work, we need to have conducted a Right to Work in the UK check as outlined above as your contract will be issued only after these have been completed and are satisfactory. You claim payment once the *Bank Details and HMRC New Starter Checklist* has been completed (Appendix 3) and returned to the People Team as part of your onboarding activities.

Please Note:

- Mandatory training will be a part of your induction, and your Expert Lead will guide and support you to complete this.
- The induction will include 15 hours of specific training, over a minimum of 3 days, to ensure you are familiar with the Oliver McGowan package. A separate payment of £300 will be made for the induction process.

Payment

Reward and payment are offered as outlined below. However, there are some occasions when it is not appropriate to offer payment. Typical exceptions include:

- Receiving payment or reimbursement from another organisation (e.g., Carers Bucks)
- Attending a learner clinic (e.g., sports therapy) as a service recipient
- Participating in a conference
- Being a research participant.

If Experts or staff are unsure where a proposed involvement activity fits within the tariff below, they should consult with their Expert Lead.

Payment Tariff

Oliver McGowan Rate

- You will receive a half-day or full-day payment.
- The payment will cover all aspects of the training delivery, including travel expenses and supporting briefings, unless otherwise agreed.

Process for Claiming Expenses and Payment

- Your Expert Lead will keep a record and submit the days you've worked on a monthly basis to Payroll, who will manually process the necessary payment.
- Payment will be made on the last working day of the month for any work completed within that month.
- If submissions come in after the Payroll cutoff, or work is completed after the payroll cutoff, payment will be made the following month.

Expert by Experience - Youth

Children and young people who act as Experts will also be recognised and rewarded for supporting the University.

Offering recognition and /or reward

Your expert lead will discuss with you, and the individual with parental responsibility, what recognition and/or reward would be appropriate. Here are some options we can consider:

- Providing certificates and/or specific details of any training for the role and activities that have been undertaken as part of the role.
- Offering references for employers, colleges and universities.
- Providing opportunities to undertake a tour of the campus/es, engage with academics and observe any teaching, learning or other activities that may be of interest.

- Providing opportunities to undertake volunteering, training or work/vocational experience. Certificates and/or letters of reference will be offered after such activities are completed.
- A choice of High Street Vouchers can be offered.

Information, Support and Resources

Induction and Familiarisation

Expert Leads will make sure you're introduced to the University and understand the key policies and processes for your role. They'll also help you get to know your College, programme or subject area, relevant PSRBs and the different processes related to the activities you will be involved in, whether that's on campus or online.

Before you start getting involved, you'll need to do some **mandatory training**. This could be via our e-learning system, in-person or online with your Expert Lead or maybe a combination depending on what works best for you and what your role involves. The training will cover important topics like:

- Data Protection Awareness (formerly GDPR)
- Equality and Inclusion
- Health and Safety
- Information Security Awareness (formally Information Security)
- Safeguarding
- The Prevent Duty in Higher Education
- Unconscious Bias

If you're already involved with other organisations like NHS Trust Patient Experience Groups, Maternity Voice Partnership, or Carers Bucks, you might have done some of this training already. If that's the case, please talk to your Expert Lead. They'll let you know what training you still need to do.

If you are an [Expert by Experience – Oliver McGowan Co-Trainer](#), you will have additional and specific training to complete which will be provided by your Expert Lead.

Training

Expert Leads will make sure you get training updates, as well as any specific training you need for your College, programme or subject area. You might also get the chance to try out events or learn from other Experts.

Support

Your main source of support will be your Expert Lead, but you'll also work with other academic members for things like debriefs after activities. If you're new, you'll get an Expert buddy to help you out. This buddy will be there from the start and will support

you until you feel confident in your role. Even if you are not new, and would still like a buddy, let us know and we'll help you with this.

labelling="Section-Header">Cancelling or Unable to attend planned involvement activities

If you can't go to an activity or event you're booked for, you need to let the academic or member of staff leading it know as soon as you can, ideally within two working days. The best way to do this is by email and make sure to include your Expert Lead. If the University must cancel an activity or event, an academic or member of staff leading it, or your Expert Lead will tell you as soon as they can. They'll also work with you to reschedule the activity or event if needed and possible.

labelling="Section-Header">Expectations before, during and after activities

All Experts will be supported by relevant staff as appropriate to each type of activity they are involved in.

Before Activities: Staff will fill out an *Experts by Experience booking form* (Appendix 8) to request your involvement in a pre-agreed activity and send it to the Expert Lead. This form will have all the details about the activity and the plan for the day. The Expert Lead will then check with you to see if you're still available. You'll get all the information you need about what's expected, and you can ask any questions you have. You'll also get the contact details of the person leading the activity, and all the details you need like times, places and parking. Sometimes, we might need to do an *Experts by Experience Risk Assessment* (Appendix 9) with you before an activity.

During Activities: At the start Staff will help you get ready for each activity, and you'll be told about any emergency procedures. You'll also be introduced to everyone there.

After Activities: You'll be provided with a debrief; a chance to talk about how it went and how you feel. You'll be thanked for your involvement and depending on the activity asked to give and get feedback. This may be done formally or informally, as outlined in the evaluation and feedback section below.

Important Note: Some activities might be emotionally difficult. If this is the case, you should tell the academic who is supporting you and choose not to do the activity. Sometimes this may be unexpected and if you need help, we can tell you where to find it.

labelling="Section-Header">Evaluation and Feedback

Expert leads will help gather feedback from everyone involved, like academic staff, learners and you, as set out in their own College, cluster, or programme level

strategies. This feedback will be formal (like surveys) or informal (like planned conversations (chats)). This should include as a minimum:

- **Annual Experience Survey:** Every year, in the Spring or Summer Term, you'll be asked to fill out this survey. The results of this will be explored in the Strategy Group.
- **Feedback on Teaching, Learning and Assessment:** After these activities, you'll have a chance to give and get feedback. This can be done informally or formally.
- **Feedback on Recruitment and Selection:** You'll also have a chance to give and get feedback on how learners are recruited and selected. This can be done informally or formally.
- **Programme or Process Changes:** If there are any changes to the programmes you support or University processes, you'll be told about them.
- **College Meetings:** There will be two meetings in person each year, during the Autumn, Winter, or Spring Terms.

Extra Feedback for Oliver McGowan Experts: If you're an [Expert by Experience](#) – [Oliver McGowan Co-Trainer](#), there might be other ways for you to give and get feedback. Your Expert Lead will tell you more about this.

Programme Committees

Programme Committee Meetings (PCMs) are important meetings where Student Reps can share feedback from learners with the staff. There are two each year, during the Autumn, Winter, or Spring Terms. They talk about how the programme is run and what's been done. As an Expert, you might be invited to these meetings instead or as well as the College Meetings mentioned above. It's a good chance for you to share your thoughts and help make programmes better.

Expert Feedback

Feedback will be collected, studied and used to guide future work and your development. Expert Leads will share this feedback where needed. It will also be talked about in regular meetings, like the College Meetings.

Promotion and Celebration

The University has a special webpage just for Experts by Experience. On this page, you can see feedback and stories from learners, staff and other Experts. This might be written down or recorded. The page is a great way to show off the work that Experts do. If you want, you can share your own story or experiences on the website. There's a template in the back of this Handbook that can help you write your story (Appendix 10). If people are interested in becoming an Expert for the

University, this webpage is the perfect place to start. People can use it to get in touch with us and learn more about what being an Expert involves.

Visiting the University

Buckinghamshire New University has different campuses, each with its own special features and resources. Campus maps and other details can be found <https://www.bucks.ac.uk/life/our-campuses>

Travel and Parking

If you're driving, you can park for at the Aylesbury, High Wycombe, and Uxbridge campuses, your Expert Lead can reserve a parking space for you if you have a blue badge. If you don't have a blue badge, you might still be able to park depending on the day. Ask your Expert Lead about this. At all campuses you must ensure you sign in at the reception area and register your car details. If parking on-site is not available on a day you need to attend, please read the relevant information below. The University does run a complementary shuttle bus service to and from BNU at Pinewood Studios, Aylesbury, High Wycombe and Uxbridge campuses. You can use this during term time as an [Expert by Experience – Consultant](#) and [Expert by Experience – Oliver McGowan Co-Trainer](#). Please ask your Expert Lead for details.

Food and drink facilities

Sometimes, refreshments will be provided for campus activities. If not, each campus has places where you can get food and drink. The staff can help you find these places. You will find further information here <https://www.bucks.ac.uk/food-and-drink>

Aylesbury Campus

This campus is at **59 Walton Street, Aylesbury HP21 7QG**. It has lots of special programmes that can help people get ready for work. It also has a Community Wellbeing Hub for residents. It's about a 10-minute walk from the train station and a 5-minute walk from the bus station. If you're driving and don't have a blue badge or a reserved parking space, you can use the public car park on Walton Street. You will find further information here <https://www.bucks.ac.uk/life/our-campuses/aylesbury-campus>

High Wycombe Campus

This campus is at **Queen Alexandra Road, High Wycombe, HP11 2JZ**. It's the biggest campus and has the most teaching and learning activities. It's about a 12-minute walk from the train station and a 10-minute walk from the bus station. If you're driving and don't have a blue badge or a reserved parking space, you can use

the public car parks in the Eden Centre or the Wycombe Swan. You will find further information here: <https://www.bucks.ac.uk/life/our-campus/high-wycombe-campus>

Uxbridge Campus

This campus is at **106 Oxford Road, Uxbridge UB8 1NA**. It's mainly used for Nursing, Midwifery, Healthcare and Social Work programmes. It's an 8-minute walk from the tube station and bus station. If you're driving and don't have a blue badge or a reserved parking space, you can use the public car parks, The Pavilions or Intu. You will find further information here: <https://www.bucks.ac.uk/life/our-campus/uxbridge-campus>

BNU based at Pinewood Studios

Buckinghamshire New University has a teaching base within Pinewood Studios, a famous film and TV studio. Pinewood Studios is situated off **Pinewood Road, Slough, Iver SL0 0NH**. Pinewood is a busy working studio, so you can't visit without arranging it first with BNU and Pinewood Studios and applying for a visitors pass. If you turn up without permission, you won't be allowed in. You will find further information here <https://www.bucks.ac.uk/bnu-based-pinewood-studios>

Complaints and Concerns

As an Expert, you can choose not to do anything that makes you uncomfortable. If you have any problems or worries, you can talk about them with any staff member or your Expert Lead. If you have a complaint or concern, you should tell your Expert Lead. They can also tell you about the University's process for dealing with complaints or put you in touch with the People Team if needed.

Glossary of Abbreviations and Terms

BNU	Buckinghamshire New University
Equality, Diversity and Inclusion (EDI)	<p>Equality means everyone is treated fairly and given the same opportunities. It's about making sure no one is treated worse because of who they are.</p> <p>Diversity is about understanding and respecting everyone's differences. A diverse group has people from many different backgrounds.</p> <p>Inclusion means making sure everyone feels welcome and valued. It's about creating a place where everyone can be themselves and do their best.</p>

Key Performance Indicators (KPIs)	<p>In universities, we use something called Key Performance Indicators (KPIs) to see how we're doing. These KPIs look at things like how well students are doing, how much work academics are doing, how well the University is running, and how stable the University's money situation is. When we include Experts by Experience, we use special KPIs to see how this is helping the University. These KPIs help us make good decisions, make education better and keep improving. This fits with BNU's promise to include everyone, respect differences, and make learning better.</p>
Objective Structured Clinical Examination (OSCE)	<p>Is a type of test used in healthcare related programmes to check how good learners are at certain skills. In an OSCE, they go to different stations and do different tasks. These tasks could be things like talking to a patient, doing a physical exam, or doing a clinical procedure. The idea is to see how a learner does in a situation that's like real life, but in a safe and controlled way.</p>
Organisation	<p>In the context of this handbook, this may include but is not limited to, a business in any sector, local authority, NHS (National Health Service) trust, statutory or voluntary agency, charity, hospital, clinic, educational establishment, daycentre, or residential unit.</p>
Professional, statutory, and regulatory bodies (PSRBs)	<p>External bodies which formally accredit, approve, and recognise university programmes, setting standards for and regulating entry into particular professions.</p>

Appendices

Please note that all appendices listed below are available to view in this handbook as well as individual documents within the Experts by Experience MS Team.

If you are an Expert and require an individual copy, please ask your Expert Lead.

Appendix 1 - *Experts by Experience About Me Form*

Appendix 2 – *Experts by Experience Agreement Form*

Appendix 3 - *Bank Details and HMRC New Starter Checklist*

Appendix 4 - *Department for Work and Pension Permitted Work Factsheet*

Appendix 5 - *PW1 Form*

Appendix 6 – *Expenses Guidance*

Appendix 7 - *Timesheet Guidance*

Appendix 8 – *Experts by Experience Booking Form*

Appendix 9 – *Experts by Experience Risk Assessment*

Appendix 10 - *Experts by Experience Bio Template*

Appendix 1 Expert by Experience 'About Me' Form

We are excited to welcome individuals with diverse backgrounds and experiences to contribute to our educational community.

This 'About Me' form is an opportunity for us to learn more about you, your interests, and why you're interested in joining our team of Experts.

After reviewing your responses, we'll reach out to schedule an informal chat. This conversation will help us decide whether this role is a good fit.

Your privacy is important to us. Any personal data you share will be kept confidential and will only be shared on a need-to-know basis, in compliance with GDPR.

If you require assistance or an alternative format for completing this form, please let us know. You can provide your name and preferred contact method below or contact the person who provided you with this form. Thank you.

Name:		Contact Details:	
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'About Me' Form

Section 1: Personal Details	
Name:	Preferred Pronouns:
If you are below the age of 18 years, please provide us with a parent/carer/guardian's name and contact details	
How do you wish to be initially contacted?	Email <input type="checkbox"/> Telephone Call <input type="checkbox"/> Text message <input type="checkbox"/>
Please provide us with your email or contact number:	
Section 2: Existing Connections	
Are you already part of an external organisation or charity in the same or comparable capacity such as NHS Patient Experience Group, Maternity Voice Partnership, Carers Bucks or similar?	<input type="checkbox"/> Yes – please provide us with some brief details: <input type="checkbox"/> No – please move to the next question
Are you part of or connected to other or additional external organisations or charities?	<input type="checkbox"/> Yes – please provide us with some brief details: <input type="checkbox"/> No – please move to the next question
Section 3: Background and Interests	
Please provide a Brief Overview of Your Background and Lived Experiences of being a patient, carer and/or user of	

<p>services – for example, this could include, but is not limited to:</p> <ul style="list-style-type: none"> • <i>Person with or parent/carer or young carer of a person with Disability, Injury, Acute or Long-term/ Chronic physical and/or mental illness</i> • <i>Foster Carer or Adoptive Parent</i> • <i>Care Leaver</i> • <i>Substance misuse</i> • <i>Ex-offender (Adult or Youth)/ user of criminal justice services</i> • <i>User of child, family or adult health (NHS or Private), care or social services</i> • <i>User of physical/sports therapy and or rehabilitation services</i> • <i>User of counselling, talking therapy, cognitive behavioural therapy or other similar services</i> • <i>User of charities or other support services</i> • <i>User of education or training services</i> • <i>Frequent user of other services or industries e.g. transport, hospitality</i> 	
<p>Please provide us with details of any Interests or Areas of Expertise you have:</p>	
<p>Please tell us What Motivates You to Become an Expert by Experience at BNU.</p>	
Observation and Shadowing	
<p>Would you be willing to visit BNU to observe activities and shadow other Experts and Academics?</p>	<p><input type="checkbox"/> Yes – please provide us with your typical availability:</p> <p><input type="checkbox"/> No – please move to the next question</p>
Additional Comments or Questions	
<p>Is there anything else you would like to share or enquire about?</p>	
<p>Date:</p>	

Appendix 2 Expert by Experience Agreement Form

Thank you for agreeing to be an Expert by Experience at BNU. We are really looking forward to collaborating with you!

If you require assistance or an alternative format for completing this form, please contact the person who gave it to you.

Before completing this 'Agreement Form', please ensure you have read the Experts by Experience Handbook which contains all you need to know about becoming, being and working with us as an Expert, how we support each other, and what you and we expect from your involvement.

This 'Agreement Form' is a non-legally binding agreement outlining mutual expectations, your experience, and what areas of work you have agreed you would like to be involved with. You are also asked to provide consent for recording, storing and sharing your personal information and to select the Expert type most suited to you.

Please note – It may be pre-populated in places by the Expert Lead whom you met for your informal chat. Ensure you check this information for accuracy, if you need to make any changes, please do so.

Section 1 All about you

Title (Mr, Ms, Ms, Dr etc):		Pronouns:	
Name:			
Preferred name/like to be called:			
If you are under 18 years old, please provide a parent/ carer/ guardian's name and contact details:			
Address and Postcode:			
Contact Telephone (Home and/or mobile)		E-mail address:	

Indicate your preferred contact method:	<input type="checkbox"/> Home Telephone	<input type="checkbox"/> Mobile Telephone	<input type="checkbox"/> Email	<input type="checkbox"/> No preference
In case of emergency contact name and their relationship to you:			In case of emergency contact number(s):	
Please indicate the term(s) you feel best describes your ethnic background:	1. <input type="checkbox"/> Asian or Asian British <input type="checkbox"/> Bangladeshi <input type="checkbox"/> Chinese <input type="checkbox"/> Indian <input type="checkbox"/> Pakistani <input type="checkbox"/> Other Asian		Please indicate your age group:	<input type="checkbox"/> Under 18 years <input type="checkbox"/> 18 – 25 years <input type="checkbox"/> 26 – 35 years <input type="checkbox"/> 36 – 45 years <input type="checkbox"/> 46 – 55 years <input type="checkbox"/> 56 – 65 years <input type="checkbox"/> 66 – 75 years <input type="checkbox"/> Over 75 years
	2. <input type="checkbox"/> Black or Black British <input type="checkbox"/> Black Caribbean <input type="checkbox"/> Black African <input type="checkbox"/> Other Black			<input type="checkbox"/> I do not wish to disclose my age
	3. <input type="checkbox"/> White and Black Caribbean <input type="checkbox"/> White and Asian <input type="checkbox"/> White and Black African <input type="checkbox"/> Other Mixed		Please indicate your gender at birth and your identified gender:	Birth Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female
	4. <input type="checkbox"/> White – British <input type="checkbox"/> White – Irish <input type="checkbox"/> Other White background			Identified Gender: <input type="checkbox"/> I would prefer not to say
5. <input type="checkbox"/> Other Ethnic Group		Please indicate if you have a disability:	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6. <input type="checkbox"/> I would prefer not to say			<input type="checkbox"/> I would prefer not to say	
Please indicate if you would require any of the following to enable you to be involved:	<input type="checkbox"/> Help with access to buildings	<input type="checkbox"/> Personal assistant to accompany you	<input type="checkbox"/> Other – Please indicate:	
If you have a 'blue badge' (or would like to use 'visitor parking' at High Wycombe or Uxbridge -please note this is never guaranteed) please provide us with the following information so parking can be	Make and Model of your vehicle:	Colour of your vehicle:	Registration number of your vehicle:	

organised for you on-site should you request it:			
Please tell us about anything else we need to know to ensure that you have what you need to feel safe and supported whilst undertaking Expert activities:	<i>Please note: a member of the academic staff will always be present</i>		

Section 2 All About Your Lived Experience

Please tell us if you have any relevant or previous involvement as an Expert by Experience with other groups (e.g. other Universities, Healthcare providers etc) and/or part of an external organisation or charity in the same or comparable capacity such as NHS Patient Experience Group, Maternity Voice Partnership, Carers Bucks or similar.				
Please indicate those which describe you the best (you can choose more than one)		<input type="checkbox"/> Patient	<input type="checkbox"/> Carer	<input type="checkbox"/> Young Carer
		<input type="checkbox"/> Parent	<input type="checkbox"/> Guardian	<input type="checkbox"/> User of Services
		<input type="checkbox"/> Foster Carer	<input type="checkbox"/> Adoptive Parent	<input type="checkbox"/> Child in Care or Care Leaver
		<input type="checkbox"/> Ex-Offender	<input type="checkbox"/> Ex-Youth Offender	<input type="checkbox"/> Other – please state:
Please indicate which are relevant to your experiences (you can choose more than one)		<input type="checkbox"/> Acute or Short-term health condition or injury	<input type="checkbox"/> Long-term or Chronic Physical health condition	<input type="checkbox"/> Long-term or Chronic Mental health condition
<input type="checkbox"/> Complex health needs	<input type="checkbox"/> Physical disability	<input type="checkbox"/> Learning Disability	<input type="checkbox"/> Learning Difficulty	<input type="checkbox"/> Neurodiversity
<input type="checkbox"/> Substance Misuse	<input type="checkbox"/> User of care services	<input type="checkbox"/> User of support/charity services	<input type="checkbox"/> User of victim support services	<input type="checkbox"/> User of perpetrator support services
<input type="checkbox"/> User of criminal justice services (e.g. police, courts, prison, probation)	<input type="checkbox"/> User of drug, alcohol or addiction/recovery services	<input type="checkbox"/> User of in-patient, maternity services and/or community midwives	<input type="checkbox"/> User of child and/or family health services in-patient or community (e.g. District Nursing)	<input type="checkbox"/> User of adult health services in-patient or community (e.g. District Nursing)

			Health Visitor, School Nurse)	
<input type="checkbox"/> User of care services	<input type="checkbox"/> User of social services	<input type="checkbox"/> User of physical/sports therapy	<input type="checkbox"/> User of rehabilitation services	<input type="checkbox"/> User of Child and Adolescent and/or adult community mental health services
<input type="checkbox"/> User of Child and Adolescent and/or adult in-patient mental health services	<input type="checkbox"/> User of talking therapy e.g. counselling, CBT, DBT, art/creative	<input type="checkbox"/> User of education or training services	<input type="checkbox"/> Frequent user of other services or industries e.g. transport, hospitality	<input type="checkbox"/> Other – please provide details
Please provide any other information you wish, relevant to your lived experiences:				

Section 3 All About Your Involvement

Please indicate which College your experiences are best suited to support:	<input type="checkbox"/> College of Healthy and Society <input type="checkbox"/> College of Creative Arts, Technology and Engineering <input type="checkbox"/> College of Leadership and Innovation
If known, please state which Programmes your experiences are best suited to support:	
Please indicate which Expert Activities you agreed with your Expert Lead you would be best suited to / would like support: <i>Please note: these areas of interest and activities are subject to the approval of the Expert Lead and their availability. All activities and input are also subject to ongoing monitoring and evaluation.</i>	<input type="checkbox"/> Programme Design, Development, Course Amendment and Evaluation <input type="checkbox"/> Open Days <input type="checkbox"/> Learner Recruitment and Selection <input type="checkbox"/> Staff Recruitment and Selection <input type="checkbox"/> Teaching and Learning <input type="checkbox"/> Oliver McGowan Training <input type="checkbox"/> Assessment <input type="checkbox"/> Working Groups <input type="checkbox"/> Panels e.g. Practice Standard, Fitness to Practise or Programme Approval <input type="checkbox"/> Research
Please state any specific activities that were discussed with your Expert Lead:	
Please indicate how you are able or would like to participate:	<input type="checkbox"/> Online – via a virtual conferencing tool <input type="checkbox"/> Offline / at home e.g. reviewing/commenting on documentation <input type="checkbox"/> In-person at Aylesbury Campus

	<input type="checkbox"/> In-person at High Wycombe Campus <input type="checkbox"/> In-person at Uxbridge Campus <input type="checkbox"/> In-person at Missenden Abbey <input type="checkbox"/> All or any of the above
Please indicate when you are able or would like to participate:	<input type="checkbox"/> Morning only <input type="checkbox"/> Afternoon only <input type="checkbox"/> Morning or Afternoon <input type="checkbox"/> Morning and Afternoon (all day) <input type="checkbox"/> Weekdays <input type="checkbox"/> Weekends
Please state any specific limitations or preferences e.g. <ul style="list-style-type: none"> • <i>Saturdays only at the weekends</i> • <i>I am only available after 10 am for any morning session</i> • <i>I am unavailable past 3 pm during the week</i> • <i>I can only support you on Tuesdays and Wednesdays</i> • 	
Please indicate that you are confident in using:	<input type="checkbox"/> A computer – desktop or laptop <input type="checkbox"/> A tablet e.g. iPad <input type="checkbox"/> Virtual conferencing tools e.g. MS Teams <input type="checkbox"/> Online systems or programmes which allow you to input information or data
Please indicate if you would require any initial help or ongoing support with using any of the above so your Expert Lead can organise this for you.	
Please indicate what type of Expert by Experience you agree to be registered as:	<input type="checkbox"/> Expert by Experience – Volunteer <input type="checkbox"/> Expert by Experience – Guest Speaker <input type="checkbox"/> Expert by Experience – Consultant <input type="checkbox"/> Expert by Experience - Oliver McGowan Co-Trainer <input type="checkbox"/> Expert by Experience – Youth

Section 5 Confirming your Agreement

Please provide your name, signature and date below to indicate that

- The information provided on this form is accurate at the time of completion.
- You have read the Expert by Experience Handbook, and understand the information and guidance provided and the expectations of being in this role.

- You consent to recording, storing and sharing your personal information on a strictly need-to-know basis following GDPR requirements. Please note - Filming happens in all of the simulation suites, 24 hours a day. This is used for security, teaching, streaming to another room and debriefing. By signing this agreement, you are also agreeing to being filmed in these areas if you work in them.

Name:			
Date:		Signature:	

If under the age of 18 years:

Parent/Carer Name:			
Date:		Signature:	

Please ensure all completed forms and information provided are shared and stored as per local agreements.

Appendix 3 Bank Details and HMRC New Starter Checklist

Please note this version is for viewing purposes only – please use the official form



Starter checklist

Tell your employer of your circumstances so that you do not pay too much or too little tax

Do not send this form to HM Revenue and Customs (HMRC)

Instructions for employer

Use this starter checklist to gather information about your new employee if they do not have a P45. You can also use this form if they have a student loan (whether or not they have a P45). Use the information to help fill in your first Full Payment Submission (FPS) for this employee. If you have already submitted your first FPS, keep using the tax code in that FPS until HMRC sends you a new tax code. If the employee gives you their P45 after the first FPS submission, use the tax code shown in parts 2 and 3 of the P45. You must keep the information recorded on the starter checklist for the current and next 3 tax years. This form is for your use only.

Instructions for employee

Fill in this form if you do not have a P45 (a document you get from your employer when you stop working for them). You should also fill in this form if you have a student loan (whether or not you've a P45). Give the completed form to your employer as soon as possible. They need this information to tell HMRC about you and help them to use the right tax code. Make sure you answer the questions correctly. If you do not, you may pay the wrong amount of tax or student loan deductions.

Employee's personal details

<p>1 Last name</p> <input type="text"/>	<p>5 Home address</p> <table border="1"><tr><td colspan="2"> </td></tr><tr><td colspan="2"> </td></tr><tr><td colspan="2"> </td></tr><tr><td>Postcode</td><td> </td></tr><tr><td>Country</td><td> </td></tr></table>							Postcode		Country	
Postcode											
Country											
<p>2 First names Do not enter initials or shortened names for example, Jim for James or Liz for Elizabeth</p> <input type="text"/>	<p>6 National Insurance number (if known)</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
<p>3 What is your sex? As shown on your birth certificate or gender recognition certificate</p> <p>Male <input type="checkbox"/> Female <input type="checkbox"/></p>	<p>7 Employment start date DD MM YYYY</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
<p>4 Date of birth DD MM YYYY</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>											

Employee statement

These questions will help you to choose the statement that matches your circumstances. The statement you choose helps your employer to apply the correct tax code.

8 Do you have another job?

Yes Put an 'X' in the statement C box below

No Go to question 9

9 Do you receive payments from a State, workplace or private pension?

Yes Put an 'X' in the statement C box below

No Go to question 10

10 Since 6 April have you received payments from:

- another job which has ended or any of the following taxable benefits
- Jobseeker's Allowance (JSA)
- Employment and Support Allowance (ESA)
- Incapacity Benefit

Yes Put an 'X' in the statement B box below

No Put an 'X' in the statement A box below

For more information about tax codes, go to www.gov.uk/tax-codes

Statement A <input type="checkbox"/>	Statement B <input type="checkbox"/>	Statement C <input type="checkbox"/>
Current personal allowance	Current personal allowance on a Week 1/Month 1 basis	Tax Code BR
<p>Key</p> <p>This is my first job since 6 April and since the 6 April I have not received payments from any of the following:</p> <ul style="list-style-type: none"> • Jobseeker's Allowance • Employment and Support Allowance • Incapacity Benefit 	<p>Key</p> <p>Since 6 April I have had another job but I do not have a P45. And/or since the 6 April I have received payments from any of the following:</p> <ul style="list-style-type: none"> • Jobseeker's Allowance • Employment and Support Allowance • Incapacity Benefit 	<p>Key</p> <p>I have another job and/or I am in receipt of a State, workplace or private pension.</p>
<p>Key</p> <p>Jobseeker's Allowance (JSA) is an unemployment benefit which can be claimed while looking for work. Employment and Support Allowance (ESA) is a benefit which can be claimed if you have a disability or health condition that affects how much you can work. Incapacity Benefit is help if you could not work because of an illness or disability before 31 January 2011. State Pension is a pension paid when you reach State Pension age. Workplace pension is a pension which was arranged by your employer and is being paid to you. Private pension is a pension arranged by you and is being paid to you. Please note that no other Government or HMRC paid benefits need to be considered when completing this form.</p>		

Student loans

11 Do you have a student or postgraduate loan?

Yes Go to question 12

No Go straight to the Declaration

12 Do any of the following statements apply:

- you're still studying on a course that your student loan relates to
- you completed or left your course after the start of the current tax year, which started on 6 April
- you've already repaid your loan in full
- you're paying the Student Loans Company by Direct Debit from your bank to manage your end of loan repayments

Yes Go straight to the Declaration

No Go to question 13

13 To avoid repaying more than you need to, tick the correct student loan or loans that you have - use the guidance on the right to help you.

Please tick all that apply

- Plan 1
- Plan 2
- Plan 4
- Postgraduate loan (England and Wales only)

Employees, for more information about the type of loan you have or to check your balance, go to www.gov.uk/sign-in-to-manage-your-student-loan-balance

Employers, for guidance on student loans and which plan or loan type to use if your employee has selected more than one, go to www.gov.uk/guidance/special-rules-for-student-loans

You have Plan 1 if any of the following apply:

- you lived in Northern Ireland when you started your course
- you lived in England or Wales and started your course before 1 September 2012

You have Plan 2 if:

You lived in England or Wales and started your course on or after 1 September 2012.

You have Plan 4 if:

You lived in Scotland and applied through the Students Award Agency Scotland (SAAS) when you started your course.

You have a postgraduate loan if any of the following apply:

- you lived in England and started your postgraduate master's course on or after 1 August 2016
- you lived in Wales and started your postgraduate master's course on or after 1 August 2017
- you lived in England or Wales and started your postgraduate doctoral course on or after 1 August 2018

Declaration

I confirm that the information I've given on this form is correct.

Full name Use capital letters

Signature

Date DD MM YYYY

Give this form to your employer

Your employer will use the information to make sure you pay the right amount of tax.

Do not send this form to HMRC.

Employer guidance

For information on how to work out your new employee's tax code, go to www.gov.uk/new-employee-tax-code

Use Statement A, B or C that your employee has chosen in the employee statement section and apply the tax code below:

- Statement A - use the current personal allowance
- Statement B - use the current personal allowance on a 'week 1/month 1' basis
- Statement C - use tax code BR

Employee Bank Details

Surname

First Name (s)

Employee number (if known)

National Insurance Number

Name of bank

Full postal address at which your account is held

Bank Sort Code - no more than 6 digits

Full name of account - e.g. A Smith A & B Smith

Account number - no more than 8 digits

Building society reference (if applicable)

Please pay my salary directly into my account as detailed above

Signed

Date

Any amendments to the above should be updated on Business Connect by you as soon as the details change to ensure payment can be made.

Appendix 4 Department for Work and Pension Permitted Work Factsheet



Department
for Work &
Pensions

Permitted work factsheet

We have many ways we can communicate with you

If you would like braille, British Sign Language, email, a hearing loop, translations, large print, audio or something else call us on **0800 169 0310** or textphone **0800 169 0314** and tell us which you need.

If you live in Wales and want this factsheet in Welsh call us on **0800 328 1744**.

Calls to 0800 numbers are free from landlines and mobiles.

DWPF01 04/23

What is permitted work?

Permitted work can help you learn new skills, build your confidence and start thinking about types of work you could do.

If you have a disability, illness, or health condition you may be able to do some work and keep your payments and National Insurance credits for Employment and Support Allowance (ESA).

Permitted work means you can:

- work for less than 16 hours each week
- earn no more than **£167.00 each week**, after tax and National Insurance has been taken off
- get your normal amount of benefit
- build up your skills and experience
- be supported while you work - we call this **supported permitted work**.

There is no limit on the number of weeks you can do permitted or support permitted work for.

Supported permitted work

Supported permitted work is for people with a disability, illness or health condition who cannot work for more than a few hours each week. The work is supervised by a professional support worker. A professional support worker is someone who works for a public or voluntary organisation.

What you must do if you want to work

Before you start any work, you must fill in a permitted work PW1 form and post it to the address at the top of any ESA letters we have sent you. Please do not take this form into your Jobcentre Plus office.

If you think the work you want to do is supported permitted work, your professional support worker must fill in their section on the permitted work PW1 form.

We will tell you if the work you want to do meets the permitted work conditions. If you do work that does not meet the conditions, you could lose your benefit.

If you cannot tell us before you start work, you must fill in a permitted work PW1 form and send it back straight away.

To get a copy of the permitted work PW1 form, go to www.gov.uk and search for PW1 or call us on **0800 169 0310**.

You must tell Jobcentre Plus straight away about any work that you are doing. If you do not, you may be paid too much ESA. You may also have to pay this back and pay a fine.

How can permitted work change your other benefits?

If you get another benefit because you are not working (for example Income Support, Housing Benefit or Council Tax Reduction), then your benefit may be reduced or stopped if you do any work. Please talk to your Jobcentre Plus work coach before you start any work.

If you get Housing Benefit or Council Tax Reduction and you are thinking of starting permitted work, you must talk to your local authority straight away, as the amount you get may change.

To contact your local authority go to www.gov.uk/find-local-council

Why DWP needs personal information and how we treat it

We treat personal information carefully. We may use it for any of our purposes.

To learn more about information rights and how we use information, please visit www.gov.uk/dwp/personal-information-charter

Appendix 5 PW1 Form

Please note this version is for viewing purposes only – please use the official form



Department
for Work &
Pensions

Permitted Work

We have many ways we can communicate with you

If you would like braille, British Sign Language, email, a hearing loop, translations, large print, audio or something else please call us on **0800 169 0310** or textphone **0800 169 0314** and tell us which you need.

Calls to 0800 numbers are free from landlines and mobiles.

Treating people fairly

We are committed to the Equality Act 2010 and treating people fairly. To find out more about this law, search 'Equality' on www.gov.uk

What is permitted work?

Permitted work can help you learn new skills, build your confidence and start thinking about types of work you could do.

If you have a disability, illness or health condition you may be able to do some work and keep your payments and National Insurance credits for Employment and Support Allowance (ESA).

Permitted work means you can:

- work for less than 16 hours each week
- earn no more than £167 **each week**, after tax and National Insurance has been taken off
- get your normal amount of benefit
- build up your skills and experience
- be supported while you work - we call this **supported permitted work**.

There is no limit on the number of weeks you can do permitted or supported permitted work for.

Supported permitted work

Supported permitted work is for people with a disability, illness or health condition who cannot work for more than a few hours each week. The work is supervised by a professional support worker. A professional support worker is someone who works for a public or voluntary organisation.

There is no limit on how many hours you can do supported permitted work for. You must earn no more than £167 each week after tax and National Insurance has been taken off.

What you must do if you want to work

Read this form carefully and make sure you fill in:

- **Pages 3 and 4** – you must answer all the questions in full
- **Page 5** – if you think the work you want to do is supported permitted work, your professional support worker must fill in this part for you
- **The declaration** – you must sign and date this **before** you send it to Jobcentre Plus.

Before you start work, you must fill in and send back this form. If you have already started work you must send your first wage slip with this form. Write in black ink and use CAPITAL LETTERS. If you want to, you can download it and fill it in. Go to www.gov.uk and search for PW1.

Send the form back in the freepost envelope we have sent you, or post it to the address at the top of any ESA letters we have sent you. Please do not take this form into your Jobcentre Plus office.

It is okay to get someone to help you fill in this form, such as a friend or relative. Or call us on **0800 169 0310** and we will help you with it.

How your earnings may affect your benefit

If you do permitted work and earn more than £167 each week, or work for 16 or more hours each week, it will affect your benefit.

Expenses will not normally affect your benefit if you get them as part of your job. By expenses we mean money paid to you by your employer that is not part of your wage. Some expenses such as travel to and from work will be regarded as earnings. To find out more about expenses, ask the office dealing with your benefit.

How your earnings may change the amount of tax you pay

If you start permitted work, you may have to pay tax on your extra income. We will tell His Majesty's Revenue and Customs (HMRC) when your permitted work has been agreed. HMRC will work out if you need to pay tax.

How can permitted work change your other benefits?

If you get another benefit because you are not working (for example Income Support, Housing Benefit or Council Tax Reduction), then your benefit may be reduced or stopped if you do any work. Please talk to your Jobcentre Plus work coach before you start any work.

If you get Housing Benefit or Council Tax Reduction and you are thinking of starting permitted work, you must talk to your local authority straight away, as the amount you get may change. To contact your local authority go to www.gov.uk/find-local-council

Attending Work Capability Assessments and work coach appointments

Your benefit may be stopped or reduced if you do not go to a Work Capability Assessment or work coach appointment when we ask you to, without good reason.



About you	About the work you are starting or have started
<p>01 Title For example, Mr, Mrs, Miss, Ms, or other.</p> <input type="text"/>	<p>09 Is your work self-employed?</p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes</p>
<p>02 Surname or family name</p> <input type="text"/>	<p>10 Employer or company name</p> <input type="text"/>
<p>03 All other names in full</p> <input type="text"/>	<p>11 Employer or company address</p> <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
<p>04 Address</p> <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<p>12 Job title</p> <input type="text"/>
<p>05 Date of birth DD/MM/YYYY</p> <input type="text"/>	<p>13 Tell us what you do at work</p> <input type="text"/>
<p>06 A phone number we can contact you on</p> <input type="text"/>	
<p>07 Email address If you have one.</p> <input type="text"/>	
<p>08 National Insurance number</p> <input type="text"/>	

14 On what date did you start work or will you start work?
If this date changes please tell us.
DD/MM/YYYY

15 How much will you earn after tax?
This is the amount after income tax and National Insurance (NI) contributions are taken off.
£
 Each week
 Each month

16 Do you get any of the following? If so, tell us about them:

- earnings or fees as a director
- maternity pay
- holiday pay
- bonus payments
- regular tips
- Statutory Adoption Pay (SAP)
- Statutory Maternity Pay (SMP)
- Statutory Paternity Pay (SPP)
- Statutory Sick Pay (SSP).

17 How many hours will you work each week?

18 If your hours will be different each week, please tell us as much as you can about your working pattern

19 When will you get your first payment?
DD/MM/YYYY

20 Will you get any expenses?
By expenses we mean any money that is paid to you by your employer that is not part of your wage.
 No **Go to question 21**
 Yes
What are these for?

How much will you get, and how often?
£
 Each week
 Each month

21 Are you sending your first payslip, bank statements or accounts with this form?
 No
 Yes

Supported permitted work

Your professional support worker must complete this section. A professional support worker is someone who works for a public body or voluntary organisation and organises work for people with disabilities, illnesses or health conditions.

The support worker must provide ongoing and regular support and supervision over the work you are telling us about.

<p>22 Title For example, Mr, Mrs, Miss, Ms, or other. <input type="text"/></p> <p>23 Surname or family name <input type="text"/></p> <p>24 All other names in full <input type="text"/></p> <p>25 Official address <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/></p> <p>26 Organisation's stamp <input type="text"/></p>	<p>27 Their phone number <input type="text"/></p> <p>Supported worker's declaration: By completing this section I am agreeing that this work will be supported and supervised by my organisation on an ongoing and regular basis.</p> <p>28 Support worker's signature <input type="text"/></p> <p>29 Date DD/MM/YYYY <input type="text"/></p>
--	--

Appendix 6 Expenses Guidance

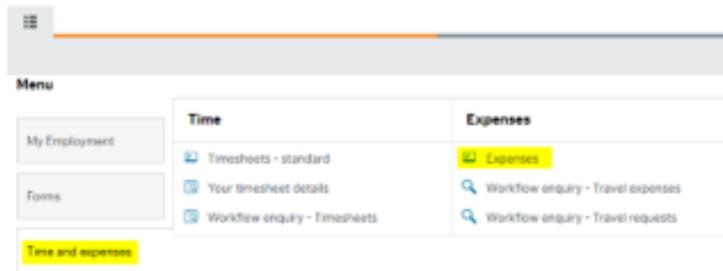
These instructions cover:

1. Entering an expense, pages 1 - 4
2. Retrieving a draft expense, page 5
3. Deleting an expense or expense row, page 6
4. Attaching receipts, pages 7 – 8
5. Expenses workflow, page 9
6. My Expenses Report, page 10

1. Entering an expense

Go to: [Time and expenses/Expenses \(below\)](#)

business connect



Please note that the default status of an expense is "Draft". It will need to be changed to "Ready" to submit for approval
Red Asterix fields * are mandatory fields

The screenshot shows the 'Expenses' form. At the top, there is a navigation bar with a hamburger menu icon and a 'Expenses x' tab. Below it, the 'Expenses' section is visible. There are three tabs: '1 - General' (highlighted in yellow), '2 - Expenses', and '3 - Summary'. The 'General' tab is active, showing the following fields:

- Status: Draft (highlighted in yellow)
- Resource: [Resource Name] (with a dropdown arrow)
- Claim Type*: Expenses (with a dropdown arrow)
- Purpose*: [Text input field]
- Comment: [Text input field]

At the bottom left, there is a 'Next step' button.

Tab 2. Expenses

Click the Add button to open Expense details then choose an Expense type from the drop-down.

Expenses

1 - General 2 - Expenses 3 - Summary

Expense items

Expense type	PO	Description

Add Delete Copy

Expense details

Expense type

- Bus Fare
- Business Entertaining Overseas
- Business Entertaining UK
- Business Mileage - Car
- Business Mileage - Motorcycle
- Call Out Mileage (taxable)
- Car Parking Ticket
- Conference/Seminar Registration Academic
- Conference/Seminar Registration PSE
- Competition Charge
- Eye Test/Glasses
- Ferry Fare
- FLU JAB WINTER 2020
- Hire Car and Fuel Overseas
- Hire Car Fuel UK
- Hire Car UK
- Home phone usage C-19

The position and work order default from your resource record.

The position can be changed using the drop-down if needed.

The work order can also be changed by overwriting the existing work order with one you want to use

Expenses

1 - General 2 - Expenses 3 - Summary

Expense items

Expense type	PO	Description	No./Base	Amount
Bus Fare	E001	Bus fare to "Other" University	0.00	10.00
			0.00	10.00

Add Delete Copy

Expense details

Expense type: Bus Fare

Position: [dropdown]

Description: Bus fare to "Other" University

Date: 26/04/2022 Amount: 10.00

GL Analysis

Workorder: BUK100-10
School of Business, Law & Computing

Tax code: PE
Purchases Exempt

Use as default Update all items

Previous step Next step

Save Clear Open Print preview Delete Template Export

Mileage Claims

If claiming mileage you can choose some of the most common trips that are in the system to automatically calculate the mileage for you. Under Mileroutes you can start entering a destination and a list will appear.

You can also choose to view all the available mileroutes by clicking the value lookup icon.

The screenshot shows the 'Expenses' system interface. At the top, there are tabs for '1 - General', '2 - Expenses', and '3 - Summary'. Below this is a search bar and a table of 'Expense items'. The table has columns for 'Expense type', 'PD', 'Description', 'No./Base', and 'Amount'. Two items are listed: 'Bus Fare' (E001) and 'Business Mileage - Car' (E003). The 'Business Mileage - Car' item is selected, and its details are shown in the 'Expense details' section below. In the 'Expense details' section, the 'Mileroutes' dropdown menu is open, showing a list of routes such as 'H. Wyncote to Uxbridge - Return', 'MALSJ - Single', etc. Two blue arrows point from the text above to the 'Mileroutes' dropdown and the list of routes.

If your mileage is not on the Mileroutes list, choose Mileroute "Other" and put in the description a clear start point and end point. Do not forget to reduce the claim by your normal daily commute from home to work (HMRC rules)

An example is below

The screenshot shows the 'Expenses' system interface with an example of a mileage claim. The 'Expense items' table shows three items: 'Bus Fare', 'Business Mileage - Car', and 'Business Mileage - Car'. The third item is selected, and its details are shown in the 'Expense details' section. The 'Mileroutes' dropdown is set to 'OTHER', and the 'Other routes mileage' is 6.40. The 'Description' field contains 'Home (SL6 9HF) to Royal Holloway University (TW20 0EX) 14.6 miles Less normal commute 8.2 miles'. The 'Rate per mile' is 0.45, and the 'Amount' is 2.88. The 'GL Analysis' section is also visible at the bottom.

Tab 3. Summary

This is the summary tab where you can see all of your expense claim

Please note that the default status of an expense is "Draft". It will need to be changed to "Ready" to submit for approval

Click Save

The screenshot shows a software interface for managing expense claims. At the top, there are tabs for '1 - General', '2 - Expenses', and '3 - Summary', with '3 - Summary' being the active tab. Below the tabs is a 'General' section with a form containing fields for Name (Simon D R Jones), Status (Draft), Transaction date (05/05/2022), Transaction number (0), Purpose (Test), and a Comment field. Below this is an 'Expense Items' table with 13 columns: ID, Expense types, Description, Date from, Date to, Number, Payment A., Costs, Project, Workload, Legentily, Currency, Cur amount, and Amount. The table contains three rows of data. At the bottom of the interface, there is a row of buttons: Save, Clear, Open, Print preview, Delete, Template, and Export.

ID	Expense types	Description	Date from	Date to	Number	Payment A.	Costs	Project	Workload	Legentily	Currency	Cur amount	Amount
E001	Bus Fare	Bus fare to "Other" Univer...	26/04/2022	26/04/2022	0.00	0.00	BU	BUX100	BUX100-10	ENJ	GBP	10.00	10.00
E003	Business Mile...	Travel to udbridge for trai...	05/05/2022	05/05/2022	0.00	31.00	BU	BUX100	BUX100-10	ENJ	GBP	13.95	13.95
E003	Business Mile...	Home (SL6 9HF) to Royal ..	05/05/2022	05/05/2022	0.40	0.00	BU	BUX100	BUX100-10	ENJ	GBP	2.88	2.88
Σ												26.83	

2. Retrieving a draft expense

If you have saved your expense as "Draft" you can retrieve it by clicking the Open button.

You can then click on the transaction row to bring up the expense and add expenses or change the status to "Ready" and submit

Value lookup

Search criteria

Advanced

Search

Period	Transac	Status (T)	Workflow st.	Reas(C)	Reas(DT)	Trip ref	Text	Description	Date from	Amount	Filter	
202210	270007144	Draft					Test	Bus fare to "Other" University	26/04/2022	10.00		
202210	270007144	Draft					Test	Travel to unbridge for train...	05/05/2022	13.95		
202210	270007144	Draft					Test	Home (SL6 9HF) to Royal H...	05/05/2022	2.88		
202205	270006839	Posted	Finished				Visit British Airways Trai...	Meeting with As...	Return travel to meeting fro...	23/11/2021	6.40	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	Visits arranged b...	From home (Holloway Road...	22/11/2021	12.50	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	Visits arranged b...	Bus to Finsbury Park Statio...	23/11/2021	10.80	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	hitects - visiting ...	From home (Holloway Road...	22/11/2021	12.50	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	hitects - visiting ...	Bus to Finsbury Park Statio...	23/11/2021	10.80	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	i West Scotland ...	From home (Holloway Road...	22/11/2021	12.50	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	i West Scotland ...	Bus to Finsbury Park Statio...	23/11/2021	10.80	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	nerate ideas for ...	From home (Holloway Road...	22/11/2021	12.50	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	nerate ideas for ...	Bus to Finsbury Park Statio...	23/11/2021	10.80	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	ations	From home (Holloway Road...	22/11/2021	12.50	
202205	270006839	Posted	Finished				Tour of London HEIs for ...	ations	Bus to Finsbury Park Statio...	23/11/2021	10.80	
202205	270006839	Posted	Finished				Tour of London HEIs for ...		From home (Holloway Road...	22/11/2021	12.50	
202205	270006839	Posted	Finished				Tour of London HEIs for ...		Bus to Finsbury Park Statio...	23/11/2021	10.80	

3. Deleting an expense

If you have saved your expense as "Draft" you can delete it by pressing Delete button or by going into Tab 2. and delete the rows you wish to remove.

If you have had an expense rejected back to you in workflow, then open the workflow task and do the same.

Expenses x

Expenses

1 - General 2 - Expenses 3 - Summary

Expense items

Expense type	PD	Description	No./Base	Amount
<input type="checkbox"/> Bus fare	E001	Bus fare to "Other" University	0.00	10.00
<input checked="" type="checkbox"/> Business Mileage - Car	E003	Travel to uxbridge for training	0.00	13.95
<input type="checkbox"/> Business Mileage - Car	E003	Home (SL6 9HF) to Royal Holloway University (TW20 0EX) 14.6 miles Less: normal commute 8.2 miles	6.40	2.68
			6.40	26.83

Add Delete Copy

Expense details

Expense type: Business Mileage - Car

Position: Dean of Business and Law

Description: Travel to uxbridge for training

Mileage: HWU 31.00
R Wycombe to Uxbridge - Return

Other routes mileage: 0.00
Date: 05/05/2022
Rate per mile: 0.45
Amount: 13.95

GL Analysis

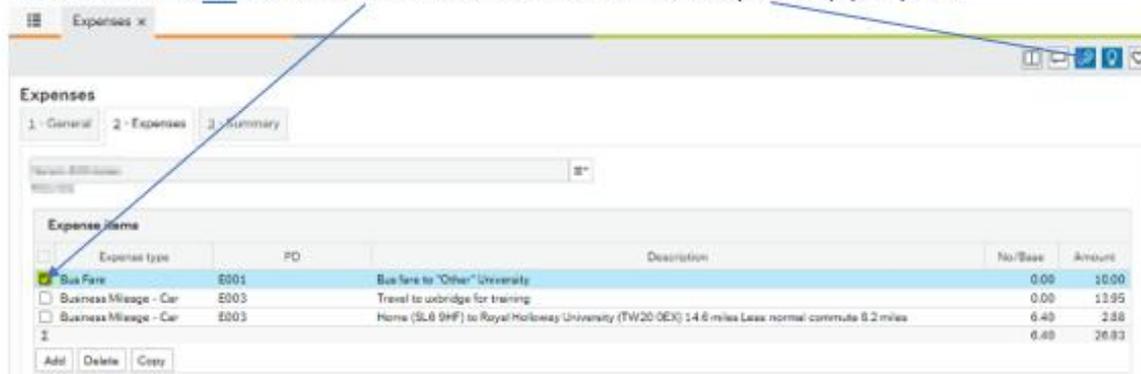
Workord: BLX100-10
School of Business, Law & Computing

Tax code: FE
Furnished Exempt

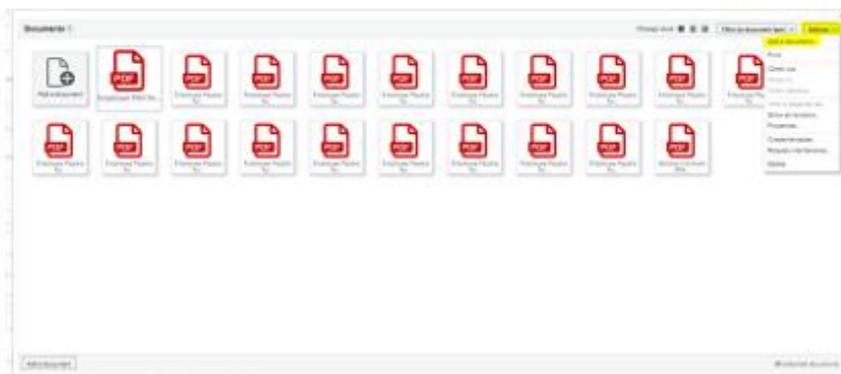
Save Clear Open Print preview Delete Template Export

4. Attaching receipts

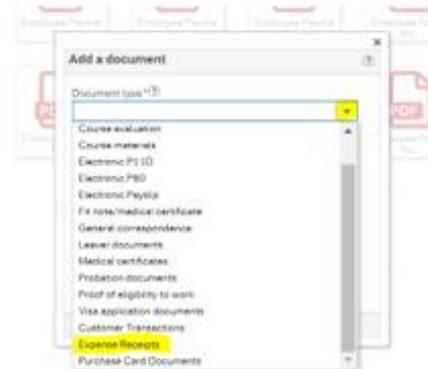
You must click on the row so it is blue and click the checkbox and then immediately click the paperclip icon



Click on the Actions button and select Add a document



Select document type "Expense Receipts" from the drop-down

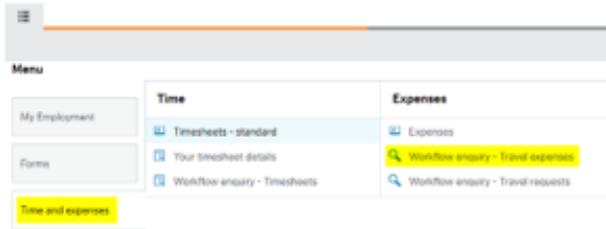


5. Expenses workflow

Once the expense status has been made Ready and saved it will enter workflow for approval.

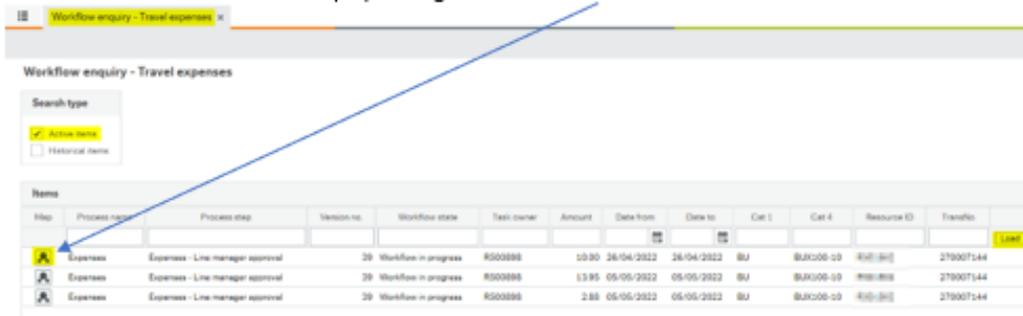
Go to: Time and expenses/Workflow enquiry – Travel expenses (below)

business connect



By default, only Active items in workflow show. You can check the Historical items box to see old expenses workflow.

You can see a detailed workflow map by clicking on the icon

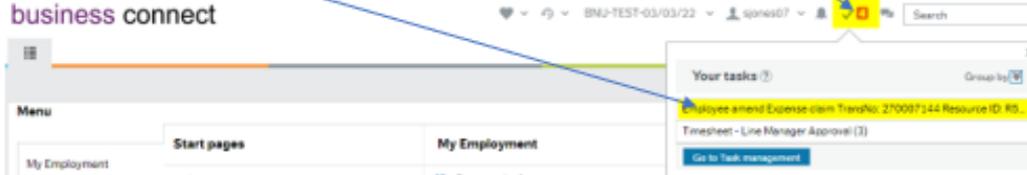


If your expense has been rejected it will then come back into your workflow tasks.

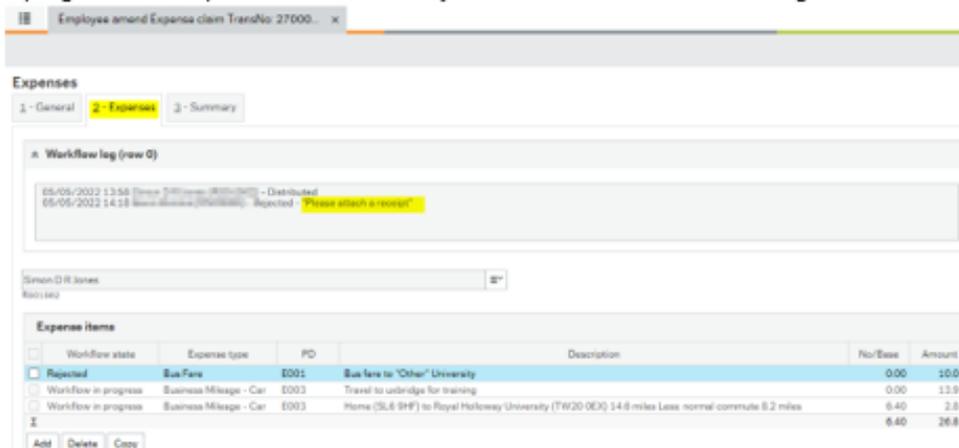
The most common reason for rejection is no receipt

Click on the task to open it up

business connect

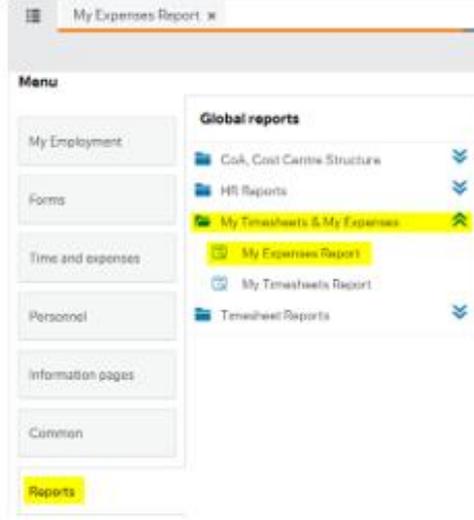


If you go to Tab 2 – Expenses and click on the rejected row it will show the workflow log and reason for rejection



6. My Expenses Report

Go to: [Reports/My Timesheets & My Expenses/My Expenses Report \(below\)](#)



The report shows all expenses entered into the system. You can export the results to excel.

My Expenses Report

Report description

Report shows all of your expenses entered into Business Connect
 Status: Posted/Approved in workflow, On Approval in workflow, Draft/Draft

Use wildcard * before/after or both around a piece of text in the empty row above the data columns to find data that contains a piece of text rather than matching it fully
 Column order can be altered by holding mouse button down over column description and dragging
 Choose column button allows user to select columns to view
 Export button exports the results to excel

Selection criteria

Results

#	Period	Transfer	Status (T)	RefID	ProdID (T)	Purpose	Description	Travel date	Date from	Date to	Expense type (T)	Amount
1	202210	270007144	On approval	9301982	Simon D R Jones	Taxi	Bus fare to "Other" University	05/05/2022	26/04/2022	26/04/2022	Bus Fare	10.00
2	202210	270007144	On approval	9301982	Simon D R Jones	Taxi	Home (SL6 BHF) to Royal Holloway University (TW20 0EX)	05/05/2022	05/05/2022	05/05/2022	Business Mileage	3.88
3	202210	270007144	On approval	9301982	Simon D R Jones	Taxi	Travel to colridge for training	05/05/2022	05/05/2022	05/05/2022	Business Mileage	13.95
270007144												26.83
4	202209	270006839	Posted	9301982	Simon D R Jones	Van British Airways Training Centre, He	Return travel to meeting from Holloway Road to Heathrow	02/12/2021	23/11/2021	23/11/2021	Other Card Inv	6.40
270006839												6.40
7	202209	270006839	Posted	9301982	Simon D R Jones	Tour of London H&Is for futures and fin.	Bus to Finsbury Park Station, and several locations across	02/12/2021	23/11/2021	23/11/2021	Rail/Fare/Uber	10.80
8	202209	270006839	Posted	9301982	Simon D R Jones	Tour of London H&Is for futures and fin.	From home (Holloway Road) to East Croydon Station near	02/12/2021	22/11/2021	22/11/2021	Rail/Fare/Uber	12.50
270006839												23.30
10	202209	270006802	Posted	9301982	Simon D R Jones	Travel to and from conference	Bus journey to railway station (Meyrickton)	02/12/2021	03/11/2021	03/11/2021	Bus Fare	1.55
11	202209	270006802	Posted	9301982	Simon D R Jones	Travel to and from conference	M&S Mail Deal	02/12/2021	03/11/2021	03/11/2021	Subsistence Fee	6.00
12	202209	270006802	Posted	9301982	Simon D R Jones	Travel to and from conference	Taxi from hotel to train station (Watford)	02/12/2021	04/11/2021	04/11/2021	Taxi	11.00
13	202209	270006802	Posted	9301982	Simon D R Jones	Travel to and from conference	Taxi from train station (Watford) to hotel	02/12/2021	03/11/2021	03/11/2021	Taxi	14.00

Choose columns Graphical presentation Create widget **Export**

Appendix 7 Timesheet Guidance

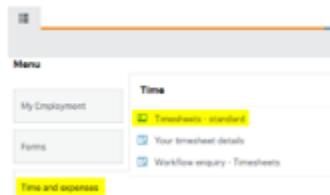
Timesheets

These instructions cover:

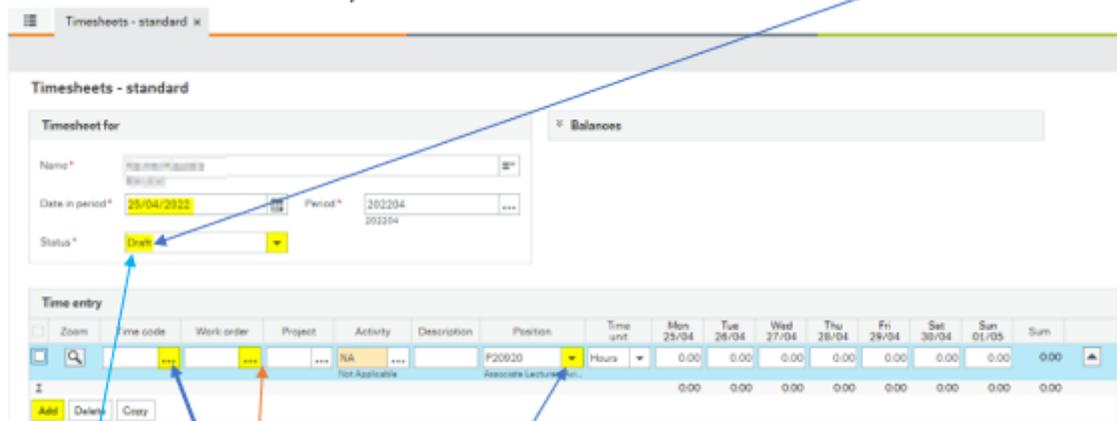
1. Entering a timesheet, *page 1*
2. Timesheet workflow, *page 2*
3. Draft Timesheets/Amending/Deleting Timesheets, *page 2*
4. My Timesheets Report, *page 3*

1. Entering a timesheet

Go to: [Time and expenses/Timesheets – standard\(below\)](#)
business connect



Enter a date in the week you are submitting a timesheet for, tab off. **NOTE: The default status is Draft**
Click the Add button to add a time entry row



Time code

Click the Time code value lookup and choose the correct Time code

If you an Associate Lecturer, please make sure to choose the correct Time code, either:

- N_ALM – Associate Lecturer Marking
- N_ALT – Associate Lecturer Teaching

Work order

Click the Work order value lookup to choose a relevant work order, you can also enter the work order manually in the field

Position

Choose a Position from the drop-down.

If you an Associate Lecturer, please make sure to choose the position that corresponds to your Time code

Marking Time Code should have a Marking Position

Teaching Time Code should have a Teaching Position

If you are a permanent employee, do not choose your permanent position

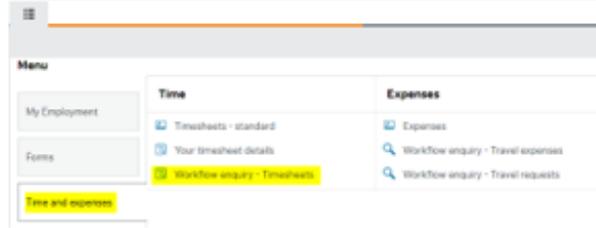
Status

You can choose to save the Timesheet as Draft (default). You can come back to it for amending.

The Timesheet must be changed to Ready for it to be submitted into workflow for approval.

2. Timesheet workflow

Go to: [Time and expenses/Workflow enquiry – Timesheets \(below\)](#)

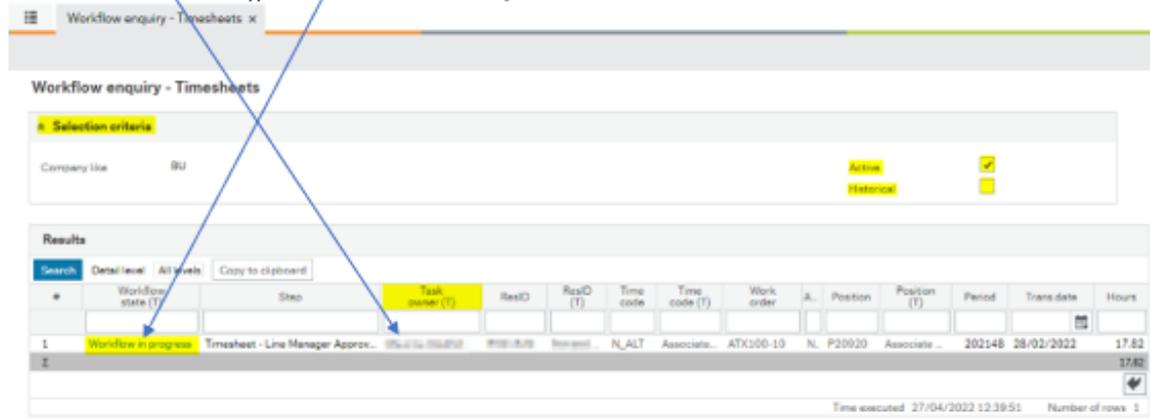


Once you have changed the timesheet status to “Ready” and clicked save, it then enters workflow to your line manager for approval. Any changes must be done via workflow, you can ask the task owner to reject it back to you.

By default, only active timesheets are shown. You can check the Historical box to see all the history

The Task Owner is the person who the timesheet is with

You can click on the blue hyperlink to see a detailed map of the workflow



3. Draft Timesheets/Amending/Deleting Timesheets

Draft Timesheets

If you have saved a Timesheet as **Draft** you can re-open it. The system will email you after 7 days to let you know you have a timesheet in draft status. You can also view the status of all timesheets by going to section 4. My Timesheets Report on page 3 to figure out the period of the Draft timesheet.

To retrieve the draft timesheet, go to Timesheets – Standard like normal and enter the Draft timesheet period in the period field, tab off Do not forget to make it Ready for submission into workflow.

Amending Timesheets

If in status Draft, the timesheet can be amended anytime.

If it is in workflow for approval, notify the task owner to reject it back to you for amendment.

If it has been approved in workflow and transferred to payroll it cannot be amended. Add missed hours onto the next timesheet.

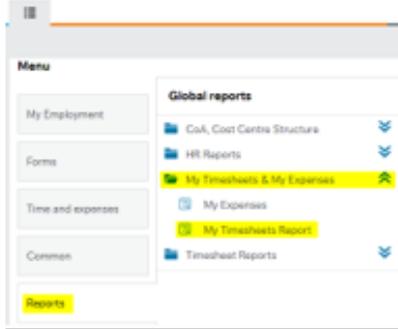
Deleting Timesheets

The same rules apply as above Amending Timesheets.

To delete a Timesheet, you need to make all of the days 0 hours, change status to Ready and then click Save.

4. My Timesheets Report

Go to: [Reports/My Timesheets & My Expenses/My Timesheets Report \(below\)](#)



The report shows all timesheets entered.

The Report description gives tips

The workflow status column and Timesheet status column give updates to your timesheet **NOTE: it shows your draft timesheets**

The screenshot shows the 'My Timesheets Report' page. It includes a 'Report description' section with instructions on how to use the report, a 'Selection criteria' section, and a 'Results' section containing a table of timesheet entries. Two blue arrows point from the text above to the 'Workflow status (T)' and 'Timesheet status' columns in the table.

#	T	ResID	Time code	Time code (T)	Work order	Work order (T)	Ac. Po.	Position (T)	Timesheet period	Timesheet date	Day	Hours	TransNo	Workflow status (T)	Timesheet status
1	A	350025011	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202204	26/04/2022	Thursday	1.00	350025011	No workflow	Draft
2	A	350025011	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202204	27/04/2022	Wednesday	1.00	350025011	No workflow	Draft
3	A	350025011	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202204	26/04/2022	Tuesday	1.00	350025011	No workflow	Draft
4	A	350025011	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202204	25/04/2022	Monday	1.00	350025011	No workflow	Draft
5	A	350024992	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202148	04/03/2022	Friday	6.00	350024992	Workflow in progress	Ready
6	A	350024992	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202148	02/03/2022	Wednesday	0.50	350024992	Workflow in progress	Ready
7	A	350024992	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202148	01/03/2022	Tuesday	3.32	350024992	Workflow in progress	Ready
8	A	350024992	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202148	28/02/2022	Monday	8.00	350024992	Workflow in progress	Ready
9	B	350024947	N_ALT	Associate Le.	ATX100-10	Aviation, Event.	NA P.	Associat.	202147	25/02/2022	Friday	6.00	350024947	Finished	Transferred to payroll

Appendix 8 Expert by Experience Booking Form

This booking form is designed to facilitate the coordination of Experts by Experience engagement and involvement as predetermined by a schedule completed by an Expert Lead. It serves as a central hub for collecting essential details about a planned activity.

Section 1 is completed by the staff member requesting the booking and submitted to the pertinent Expert Lead, who will review the information provided and check availability with the relevant Expert.

In some cases, once an Expert is booked, an Expert by Experience Risk Assessment (Appendix 9) may need to be conducted before the activity takes place to ensure safety and suitability. If you are unsure if you need to complete one of these, please speak to your Expert Lead.

Section 2 is completed by the Expert Lead once the Expert has been booked. A copy of the completed form is then sent to the staff who made the booking, and any other staff member indicated on the form, as well as the Expert. Experts need to receive all the necessary information regarding the activity, including contact details of the activity leader/academic lead, times, locations, and parking instructions. To this end, this form will be provided to them, so please ensure it is completed in its entirety avoiding abbreviations and jargonistic phrases.

It should be noted that the booking of an Expert is a partnership, as such Experts support learners and staff, and we support the Expert. For all activities, an appropriate member of staff should be present at all times. Please review the handbook for other details.

Section 1 To be completed by the staff member making the booking request

Personal Details	
Name and Role of the Staff member / Academic completing the form:	
College:	
Contact Information:	
Expert Involvement	
Please provide details of the Expert and their lived or Expert experience:	
Role of the Expert in the Activity (what do you want them to do) e.g. be a patient in a role-play activity	
Please provide details regarding any preparation they will need to undertake for the activity:	
Activity Details	

Programme (if relevant):	
Module name and code (if relevant):	
Type of Activity: <input type="checkbox"/> Programme Design, Development, Course Amendment and Evaluation <input type="checkbox"/> Open Days <input type="checkbox"/> Learner Recruitment and Selection <input type="checkbox"/> Staff Recruitment and Selection <input type="checkbox"/> Teaching and Learning <input type="checkbox"/> Oliver McGowan Training <input type="checkbox"/> Assessment <input type="checkbox"/> Working Groups <input type="checkbox"/> Panels e.g. Practice Standard, Fitness to Practise or Programme Approval <input type="checkbox"/> Research <input type="checkbox"/> Other	What is the purpose/context of this session? Please provide a description or a brief of the activity / or plan for the day (please attach additional documentation if needed): <u>If a teaching/ learning /assessment activity.</u> <ul style="list-style-type: none"> • What are the Intended Learning Outcomes? • Will it be the whole group/small groups, etc? • What year/ level and how many students in total?
Date(s) and Time(s) of the Activity:	
Duration of the Activity:	
Location of the Activity:	
Name and Contact Details of Activity Leader / Lead Academic:	
Name and Contact Details of the main contact on the day e.g. Module leader, seminar leader, course administrator, if not the above.	
Risk Assessment	
Please indicate if the activity requires a risk assessment to be undertaken and who will do this:	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, the name of the person who will complete:
Staff /Academic's Signature:	
Date of Booking request:	
Name of Expert Lead sent to:	

Section 2 To be completed by the Expert Lead facilitating the booking

Name of Expert booked:	
Contact Information:	
Involvement confirmed via:	

Please confirm if the Expert needs any additional support to engage with the activity and what this involves:	
Please confirm if car parking arrangements have been made and what these are or if they are required:	
Expert Type:	<input type="checkbox"/> Expert by Experience – Volunteer <input type="checkbox"/> Expert by Experience – Guest Speaker <input type="checkbox"/> Expert by Experience – Consultant <input type="checkbox"/> Expert by Experience - Oliver McGowan Co-Trainer <input type="checkbox"/> Expert by Experience – Youth
Please confirm if the Expert needs support with completing/submitting expenses or payment claims and who will do this:	
If the activity requires a risk assessment, please confirm if this has been completed:	<input type="checkbox"/> Yes <input type="checkbox"/> No If No, the name of the person who will complete and by what date:
Name of Expert Lead:	
Date of Booking confirmation:	

Please ensure all completed forms are shared and stored as per local agreements

Appendix 9 Expert by Experience Risk Assessment Form

This Risk Assessment Form is designed to ensure the safety and well-being of all participants involved in academic activities at our institution. It is a crucial part of our commitment to creating a safe and inclusive environment for learning, teaching, research, and other related activities.

The purpose of this form is to identify any potential risks associated with an activity that involves an Expert by Experience (Expert). By identifying any risks in advance, we can take appropriate measures to mitigate them, ensuring that all participants can engage in the activity safely and effectively.

The lead academic for the activity should complete this form ahead of any involvement activity such as teaching, learning, assessment, learner or staff recruitment, research, open day, etc., where an Expert by Experience would take part to help prepare adequately and ensure the safety and success of the activity.

Personal Details	
Name and Role of the Academic:	
College (and Programme if relevant):	
Contact Information:	
Activity Details	
Type of Activity (Teaching, Learning, Assessment, Recruitment, Research, Open Day, etc.) and Module (if relevant):	
Date and Time of Activity:	
Location of Activity:	
Expert Involvement	
Name of the Expert:	
Role of the Expert in the Activity:	
Risk Assessment	
Please identify potential risks associated with the activity: <ul style="list-style-type: none"> • Who might be harmed and how? • What measures are in place to control the risks? • What further action is necessary to control the risk? • Who is responsible for implementing the additional measures? • Deadline for implementing the additional measures: 	
Academic's Signature:	
Date:	

Please ensure all completed forms are shared and stored as per local agreements

Appendix 10 Expert by Experience Bio Template for BNU webpage

This template provides a structured format for sharing your unique experiences and insights. Your story is a valuable contribution that helps highlight the important role of Experts by Experience at our University.

We encourage you to personalise each section of the template to reflect your own journey, interests, and perspectives. Sharing your story not only highlights the meaningful contributions you've made but also inspires others to join our community.

Introduce yourself (please feel free to mention your personal interests and anything else you think the public, learners, professionals etc would like to know about you)	
If you are connected to a charity or other service , please tell us about this e.g. Carers Bucks	
Briefly explain your lived experience	
Discuss your passions and values and why being an Expert by Experience is important to you	
Tell us about what activities you have supported the University with and what programmes of study you are linked to	
Do share a particular event/activity which you engaged in at BNU that stood out as being particularly enjoyable/ interesting/ insightful/ received great feedback etc.	
If there are other areas you are looking forward to being involved in, please tell us about those too	
Please share why being an Expert by Experience is a great role and why others should consider it too!	

Providing consent

Please provide your name, signature and date below to indicate that you consent to this information being shared on BNU's website and intranet (BEN).

Name:			
Date:		Signature:	

If under the age of 18 years:

Parent/Carer Name:			
Date:		Signature:	

Please ensure all completed forms and information provided are shared and stored as per local agreements.

Appendix 11 Expert by Experience Guest Speaker Agreement template

LETTER OF ENGAGEMENT

TO BE COMPLETED BY THE BNU REQUESTOR:

Name of BNU Requestor	
Budget code	
College	
Date/s of session	Click or tap to enter a date.
Name of Expert by Experience	
Brief session description	
Agreed TOTAL fee inc VAT (if applicable) + travel / any other agreed expenses	

TO BE COMPLETED BY THE EXPERT BY EXPERIENCE GUEST SPEAKER:

Full trading name (if applicable)	
Address of payee or limited services company	
Company registration number OR HMRC UTR number if self employed	
VAT Number (if registered)	
Name of bank	
Address of bank	
Name of account holder	
Sort code	
Account Number	

Are you eligible to work in the UK?	YES / NO	
Are you able to prove your identity to BNU if required to do so?	YES / NO Choose an item.	
ELECTRONIC SIGNATURE		

I have read, understood and agree to the terms & conditions (p. 2 &3)	YES	NO
--	------------	-----------

TO BE COMPLETED BY THE HEAD OF COLLEGE / AUTHORISED SIGNATORY:

ELECTRONIC SIGNATURE	
-----------------------------	--

TERMS AND CONDITIONS

Engagement

You have agreed to deliver the EbE guest speaker sessions set out above and to undertake the preparation required to do so. **You are only able to deliver 3 sessions per academic term for BNU.** If you exceed these sessions, you will need to be engaged as a worker.

Fees

You shall be paid the TOTAL fee as confirmed above for the completion of the session inclusive of preparation undertaken.

The University has determined this arrangement to fall outside the scope of the HMRC legislation known as IR35. You will therefore be responsible for accounting for all your income tax, national insurance and value added tax liabilities to the appropriate authorities.

The University will provide you with a purchase order in relation to this arrangement. You should submit an invoice covering the agreed fee / expenses, clearly stating the purchase order number* within 30 days of the session. Invoices submitted should be sequentially numbered, in pdf format, include the full name and address of your company / home address and submitted to **Experts by Experience (EbE) finance Team (ebe.invoices@bnu.ac.uk)** at Buckinghamshire New University. An example invoice is appended to this letter for your reference.

*You can obtain the PO number from your Expert Lead.

The University will consider and verify that invoice in a timely fashion and will pay any sums due under the invoice no later than 30 days from:

- a. the date that the invoice is received,
- a. the date on which the University has determined that the invoice is valid and undisputed, whichever is the later.

The University will pay VAT at the prevailing rate, where this is correctly presented on the invoice

Insurance - Please submit an up-to-date copy of your public liability insurance document if you are providing this work as a limited or personal service company.

Accountability

You are delivering sessions at the University as a self-employed contractor, not as an employee, of the University.

For the avoidance of doubt this letter does not create an employment relationship with the University.

You may, with the prior written approval of the University and subject to the following proviso, appoint a suitably qualified and skilled substitute to perform the services on your behalf; the substitute shall be required to enter into direct undertakings with the University, including those relating to confidentiality. If the University accepts the substitute, you shall continue to invoice the University and shall be responsible for the remuneration of the substitute. For the avoidance of doubt, you will continue to be accountable for all duties and obligations set out in this Agreement for the duration of the engagement of the Substitute.

If you are unable to provide a substitute, an IR35 determination will be undertaken and your fee may be subject to deductions for tax and national insurance if you are found to be inside the scope of IR35.

While attending the University, you will be accountable to:

Confidential Information

In the course of your engagement you may have access to confidential information relating to the University, its students, employees and other parties, or information or other material which is of a confidential nature or which is protected by copyright, patent, trademark or other intellectual property rights. You must not use such information or material for your own benefit nor disclose it to other persons without the consent of the University unless required to do so by law both during and after the termination of this arrangement. If you are in any doubt regarding the use of information in the pursuit of your duties you should seek permission from your assigned Dean of College before communicating such information to any third party.

Criminal Convictions

If during the course of this engagement you are convicted of a criminal offence you must report the matter in strict confidence to the University's Director of Human Resources.

Location

The location of each session is as set out above and/or will be notified to you in advance. Most sessions take place at one of the University's four campuses, and this should be agreed between yourself and the Expert Lead.

Personal Property

The University accepts no liability or responsibility for the loss or damage of your personal property.

Policies and Procedures

Throughout the duration of this engagement, you are required to, and agree to comply with the University policies, procedures and Code of Conduct. Copies of these policies are available on the [University's website](#), or by contacting the Human Resources Directorate via humanresources@bnu.ac.uk.

Variation

Any variation to this engagement shall be in writing and signed and agreed by both parties.

Termination

Either party may terminate this engagement by giving 28 days' written notice, specifying the date from which termination will be effective. In such an event, the University shall make reasonable payment to the Expert the work undertaken prior to the date of termination.

The University reserves the unconditional right to terminate this engagement on any of the following grounds and without liability for payment of fees:

- personal and/or professional fraud, dishonesty or serious misconduct;
- professional incompetence or serious or persistent negligence;
- material breach of the University's requirements regarding this engagement or any of the policies and procedures to which express reference is made in this letter;
- a conduct or a course of conduct, or conviction of a criminal offence, which may tend to bring you or the University into disrepute;
- non-renewal or revocation of your professional registration (if applicable);
- death.

Security

You are required to wear the BNU visitor's access card issued by the University at all times whilst on University premises. You must be accompanied by your Expert Lead or another BNU nominated person at all times around campus.

Appendix 12 Experts by Experience Guest Speaker Invoice

EXPERTS BY EXPERIENCE INVOICE
 INVOICE NUMBER (INITIALS+DATE OF INVOICE): **XXXXX**
 DATE OF INVOICE: **XX/XX/XXXX**

To:

EBE Finance Team

Buckinghamshire New University

High Wycombe Campus

Queen Alexandra Road

High Wycombe

Buckinghamshire

HP11 2JZ

INVOICE For:

EBE NAME: **XXXXX**

To Be Completed by College Finance Administrator:

PO NUMBER:

Invoice Due within 30 Days of Invoice Date.

[Please email invoice to ebe.invoices@bnu.ac.uk](mailto:ebe.invoices@bnu.ac.uk)

DESCRIPTION OF WORK	DATE	RATE	AMOUNT
Example: Expert Session with Students	05/09/2024	£40	£40

Expenses			
Example: Business Mileage @ 45p per mile		£5.00	£5.00
TOTAL DUE FOR PAYMENT			£0.00

Thanks, and Acknowledgements

BNU thanks and gives acknowledgement to the following Universities that supported the completion of this document and advised on process:

- University of Central Lancashire
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- De Montfort University
- University of Huddersfield
- University of Southampton
- University of South Wales
- University of Plymouth
- University of Nottingham
- Staffordshire University
- Robert Gordon University
- Edge Hill University
- Birmingham City University

Buckinghamshire New University Campuses

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