

MISSOULA COUNTY LIVED EXPERT HONORARIUM PAYMENTS

Purpose

Individuals with lived experience are best suited to attest to their realities, and their narratives should be centered in order to understand the impact of programs, policies and service offered by Missoula County. Honoraria are provided to people with lived experience who participate in focus groups, action groups, and/or community feedback groups to acknowledge their expertise and contributions to improving the relevance, effectiveness, and accessibility of Missoula County programs and services.

Scope

This policy is applicable to all County departments and entities, for all groups made up of lived experts who are providing insight on Missoula County programs, policies, and services offered. Departments may apply additional requirements as long as they are equal to or more restrictive than these standards.

Administration

- A. Department heads are responsible for the implementation of this policy within their departments.
- B. The County Auditor shall provide general oversight and assistance to county departments in the administration of this policy and should be considered a resource for questions and information regarding payments. In that role, the County Auditor's responsibilities include but are not limited to: assisting departments with sample language and documents, serving on evaluation committees if desired, and reviewing department documentation and procedures to verify compliance with this policy.
- C. Although the County Commissioners have final authority for administration, interpretation, and application of the terms of this policy, it is strongly recommended that questions of interpretation be resolved with the County Auditor and/or Access & Engagement Coordinator prior to seeking an interpretation or ruling from the Commissioners.
- D. The public has the right to inspect and copy all purchasing and payment documents

References

Missoula County Resolution 2021-087

Definitions

Lived Expert: Any community member with past or present direct, first-hand experience with Missoula County services, programs and/or policies, or a situation (like houselessness, poverty, substance use disorders, etc.) who can provide feedback/insight based on their personal stories.

Participation Barriers: Any circumstance that would prevent a lived expert from fully participating in the program.

Policy

Missoula County is committed to understanding the impact of our programs, policies and services from the perspective of those who are most impacted. It is important to understand that asking lived experts to provide input and perspectives on programming, projects and/or services is considered labor and should be compensated for. This policy outlines how Missoula County can provide compensation for lived experts who do not fall under other compensation categories (i.e.: employee, independent contractor, or professional services).

Programs that qualify for use under this policy include facilitated interactions with Missoula County employees to provide experiences and perspectives regarding Missoula County programming, projects and/or services (e.g.: listening sessions, focus groups, action groups, etc.). Please note, programs that include short interactions, like surveys, and long-term engagements, like coalition meetings, cannot be used under this policy.

Procedures

County departments who have developed a lived expert program shall follow the outlined steps to ensure honorarium payments are processed in a timely manner.

1. Amounts: Honorarium payment amounts can be any amount that falls within budgeted funds.
2. Lived Experts must be notified of the following prior to participating in any County program:
 - a. Honorarium payments are considered taxable income and may have an impact on taxes and eligibility for assistance programs.
 - b. Lived Experts are required to complete a W-9 tax form (see Appendix C).
 - c. Lived Experts who receive any combined payments from Missoula County totaling \$600 or more in a tax year will receive a 1099 tax form at the end of the tax year.
 - d. Lived Experts who receive any combined payments from Missoula County totaling less than \$2000 will not receive a 1099 tax form at the end of the tax year.
3. Methods: Honorarium payments must be made to lived experts in one of two ways:
 - a. Check:
 - i. To have a payment made via check, email a copy of the signed Lived Expert Program Compensation Agreement and include name of payee, date of meeting, amount to be paid and current address to the person in your department who handles claims.
 1. If the Lived Expert's current address is different than what is on their completed W-9, a new one must be completed.
 - ii. Payment will be mailed to the Lived Expert and could take 6 to 8 weeks to process.
 - b. Gift card:
 - i. Gift cards shall be treated as cash. Departments providing honorarium payments via gift cards must reach out to the Auditor's office to establish a process for keeping these safe.
 - ii. Gift cards shall be provided to the Lived Expert at the conclusion of the meeting
 - iii. Gift cards can be purchased by using County issued credit cards at any store where gift cards are sold.

4. Documentation: The following documents must be completed by the lived expert and county staff prior to the first meeting.
 - i. Lived Expert Program Compensation Agreement (Appendix A). This agreement has been approved by legal and is specific to the payment process. If edits to this agreement are required to meet program/department needs, the program facilitator shall get approval of edits from legal. Once completed, an electronic copy must be retained in the department files.
 - ii. W-9 (Appendix C) Completed form shall be provided to the person in your department who handles claims.
 1. Claims person must retain the compensation agreement in department records in a location that will protect personal and financial information. W-9 documents must be sent to Jacque Harris (jmharris@missoulacounty.us) in the Finance department with a description including for what and how the W-9 was collected.
5. Participation Barrier Payments: Lived Experts may experience barriers to participating in a county program resulting in extra expense to them. Participation Barrier Payments are intended to allow for the Lived Expert to fully participate in the county program and shall be provided prior to any scheduled meetings. The following have been identified as potential barriers:
 - a. Childcare:
 - i. Participation Barrier Payments can be provided to Lived Experts who require childcare during program meetings/activities at the rate of \$15 per hour.
 - ii. Travel time and meeting time should be included in the total number of hours childcare is paid for.
 - iii. Payment for childcare can be provided via check or gift card.
 - b. Transportation:
 - i. If a Lived Expert has a vehicle, but needs gas money to get to the meeting/activity location the following Participation Barrier Payments can be made:
 1. If the Lived Expert has to travel fifteen (15) miles or less a gas gift card of \$10 (ten dollars) shall be provided.
 2. If the Lived Expert has to travel sixteen (16) miles or more a gas gift card in the amount determined by the following formula shall be provided:
 - a. $\text{Milage} \times \text{Federal Business Standard Milage Rates} = \text{Gas Card Amount}$
 - ii. If a Lived Expert needs to use a ride share (i.e.: Uber), they may request reimbursement by providing a receipt to the program facilitator.

1. The program facilitator will request payment following the steps outlined in Section 2.a and attach a copy of the receipt provided by the Lived Expert.
- c. When providing Participation Barrier Payments:
- i. Every effort shall be made to overcome participation barriers by utilizing county and staff resources and/or community resources. It is only appropriate to provide Participation Barrier Payments if it cannot be provided by Missoula County. (See Appendix B for examples.)
 - ii. Participation Barrier Payments will only be paid to the individual named on the Lived Expert Program Compensation Agreement.
 - iii. Participation Barrier Payments are included in total amounts covered in Section 2.

Technical Assistance

For questions regarding this policy, or for assistance with determining if your program aligns with this policy, please contact:

Elisha Buchholz
Access & Engagement Coordinator
ebuchholz@missoulacounty.us
406-544-4949

Appendix A: Lived Expert Program Compensation Agreement

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Lived Expert Program Compensation Agreement

This Lived Expert Program Compensation Agreement (Agreement) is entered into on this ____ day of _____, 202_ between the Missoula County Department/Program and Lived Expert listed below. This Agreement is not intended , and shall not be construed, to create an employment relationship between the Lived Expert and the Missoula County Department/Program. In accordance with Montana State law, all payments are public record.

Department/Program Details

Program Name: _____ Department: _____
Facilitator Name: _____ Facilitator Phone: _____
Facilitator Email: _____

Lived Expert Details

Name: _____ Phone: _____
Mailing Address: _____ City, State, Zip: _____
Email Address: _____

By initialing next to the following statements, Lived Expert agrees to the following terms of participation:

____ Lived Expert will notify the program facilitator of any changes in mailing address for up to a year after program has ended.

____ Lived Expert will be compensated through honorarium payment(s) for their time in the amount of \$____ per meeting/activity to be paid by (initial one of the following):

____ **check**, which takes 6 to 8 weeks to process and will be sent to my mailing address

____ **gift card**, which will be provided to me at the conclusion of each meeting/activity

____ In addition to honorarium payments, Lived Expert may be eligible for Participation Barrier Payments to assist with childcare and/or transportation needs ensuring their ability to fully participate in meetings/activities. Depending on Lived Expert's needs, these payments may be made via check or gift cards.

____ Receiving honorarium or Participation Barrier payments may impact the Lived Expert's taxes and/or eligibility for assistance programs (i.e.: SNAP, Medicaid, etc.). Missoula County cannot provide any guidance concerning the impact on tax or eligibility consequences.

Lived Expert Signature

Date

Program Facilitator Signature

Date

Department Supervisor Signature Date

Date

Appendix B: Participation Barrier Reimbursement Alternatives

The following have been identified as potential barriers to participation. This is not an inclusive list and is intended to share examples of other resources that should be explored prior to pursuing reimbursement.

Childcare: Some Lived Experts may require assistance with childcare in order to fully participate in a program. Before offering the Lived Expert reimbursement, the following alternatives should be explored:

- Offering on-site childcare for multiple participants. This is ideal when multiple participants have a need for childcare and will likely cost less than offering individual reimbursement.
 - o If this option is used, childcare must be provided by a licensed and insured provider.
 - o If a participant is not comfortable with having their child(ren) join a group childcare setting (due to safety or health reasons), reimbursement may be used.
- Allow children to attend the meetings as well.
 - o Consider having child activities, like coloring books or building blocks, available during the meeting.
- Consider the time of your meetings. Depending on the participants, you may be able to schedule meetings during school hours

Transportation: Some Lived Experts may not have access to a vehicle or other transportation to ensure they can attend meetings. Before offering the Lived Expert reimbursement, the following alternatives should be explored:

- Public Transit: Mountain Line has direct service to many parts of the city and offer Para transport options. A full schedule can be found on their website at <https://mountainline.com/your-trip/maps-schedules/>.
- Carpooling: Participants may be able to ride together if they live in similar areas of the county.
- County Vehicles: If there is staff capacity, a county vehicle may be reserved and used to pick up participants. Safety and risk considerations should be weighed with the cost benefits before using a county vehicle. Transporting children in county vehicles is not prohibited. Questions concerning safety and risk can be directed to the Chief People & Risk Officer.

Appendix **C: W-9**

Current version of the IRS W-9 form can be found online at: <https://www.irs.gov/forms-pubs/about-form-w-9>

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