

Equitable Compensation Taskforce Report

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EXECUTIVE SUMMARY

The Need

Thriving Families, Safer Children (TFSC) is a national commitment to child, youth, and family well-being. The TFSC movement includes 22 sites nationwide as well as lived expert leaders and five national partner organizations. Together we envision a world in which all children, youth, and families live in just and equitable communities with the supports, opportunities, and resources they need to thrive and remain free of unnecessary child welfare system involvement. To accomplish this, we believe in the importance of:

- Partnering with lived expert leaders
- Centering the work in communities
- Addressing issues of equity and disproportionality
- Emphasizing upstream strategies for prevention, health promotion, and well-being

Within the TFSC structure, we have observed inconsistent practices across sites and partner organizations in how we compensate lived expert partners (*also referred to in this report as lived experience partners, individuals with lived experience, or LEX*). The points of variance include different rates of pay, how compensation is delivered, the structure of job contracts, sources of funding, and more. This matters because compensation directly influences the ability of lived experts to participate fully in the work of Thriving Families, Safer Children. For example, if lived experts are not paid at a rate commensurate with their experience and role, and if they are not able to cover additional costs for childcare and peripheral expenses that would make their participation not feasible, they may decline to participate or be limited in how much they can contribute.

Additionally, the issue of compensation has implications for how lived experts are seen as leaders in the room. Thriving Families, Safer Children purports to value the leadership of lived experts, but if these experts are not compensated at a professional level, they may lose credibility in spaces shared with agency personnel and employees of local organizations. In some cases, sites may be eager to better compensate lived expert participants, but their leaders are constrained by complex logistics and limited resources available.

At the urging of participants in the TFSC Lived Experience Roundtables who have experienced the impact of inconsistent compensation practices, and at the request of TFSC sites that are seeking guidance on best practices, the Thriving Families Executive Team commissioned an Equitable Compensation Taskforce to take up this issue.

The Objective

For sites, we set out to recommend a funding model for lived expert compensation, including suggested rates of pay and potential sources to fund this investment sustainably. We also set out to provide

guidance on creating conditions to equitably compensate lived experience partners for their partnership and participation.

For lived expert partners, we aimed to provide guidance around the “benefits cliff,” meaning any tradeoffs between receiving financial compensation and remaining eligible for public benefits. We also aspired to identify coaching needs for individuals on how to make an informed decision about participating and how to advocate for their needs.

Our overall objective is that lived expert partners are treated like professionals, appropriately valued for their expertise, and equitably compensated for their contributions. It is crucial that sites are equipped to include lived expert engagement in their annual budgets and project plans. This work is fundamental to ensure that we are living our value of centering lived expertise in a meaningful way.

The Approach

The Equitable Compensation Taskforce defined four priority areas of inquiry that now frame the report:

1. **Conditions for successful partnership:** How can sites best position lived experts to participate impactfully?
2. **Compensation formula:** How much should sites pay lived expert partners?
3. **Issuing compensation:** How should sites pay lived expert partners?
4. **Financial sustainability:** How can sites finance the compensation for lived expert partners?

Taskforce members self-selected which priority areas to work on. Our work under each priority area included preliminary research, interviewing subject matter experts, and seeking out existing best practices. Our objective was to produce a series of clear recommendations for immediate adoption. Where relevant we have also provided resources for sites or individual lived expert partners to use in future employment or compensation negotiations.

Key Recommendations for Sites

Recommendations are provided in this report for each area of inquiry. In brief, the taskforce believes that Thriving Families, Safer Children sites should:

1. Define clear roles and responsibilities for lived experience partners and provide comprehensive onboarding and ongoing professional development that positions lived experts for success.
2. Pay all lived expert participants a fair market wage for the local economy and consider providing additional financial support (such as childcare and transportation) to enable lived experts to participate fully.
3. Prioritize timely payment for lived experience partners, and advise lived experience partners about potential tax and public benefit implications of their participation.
4. Pursue federal and state funding sources to reliably and sustainably compensate lived expert partners.

Key Recommendations for National TFSC Partners

National partners in the Thriving Families, Safer Children ecosystem also have responsibility to support and promote equitable compensation for lived expert participants. The taskforce recommends that the national TFSC governing committees and partner organizations should:

- Provide professional development opportunities to help lived experience partners advocate for themselves and provide training for lived experience partners about the “benefits cliff.”
- Create a forum for lived experience partners and site teams to share information about their compensation models and collaborate on creative solutions.
- Use their public platforms to communicate about the importance of compensating persons with lived experience for all of their contributions in the field.
- Advocate and support sites who wish to advance efforts for additional flexibility in state and federal funding streams to compensate lived experience partners.

Overall, the recommendations in this report echo conversations that are taking place among lived experience partners and organizations in the human services field. Unfortunately, we are unable to provide a single, transformative solution to the issue of compensating lived experience partners who play a vital role in our shared work. However, we hope this report will underscore and amplify the criticality of compensating lived experts for their contributions. Sustaining compensation through the use of federal and local public dollars continues to be an open issue, and we hope that the taskforce serves as a catalyst for further exploration in this area. Additionally, we hope that by consolidating our findings and providing actionable guidance for organizations, we can positively influence the field.

What’s Next

We believe there are additional topics outside the bounds of this report that would be impactful to the ongoing pursuit of equitable compensation for all lived experts working in the field of child welfare and beyond. We encourage readers of this report to explore the following issues for further research, consideration, and action:

- **Philanthropic models:** How might grant makers more explicitly call for and support a paid role for lived expert leaders in the projects they support? For example, could funders include new terms in their grant applications or introduce new grant budget line items explicitly for the compensation of lived expert participants?
- **Public policy:** How might individuals, organizations, and elected officials strategically advocate for more local or federal funds that can be used to compensate lived experts?
- **Culture and climate:** How might we collectively create the conditions for a professional culture and climate in which lived experts are invited, welcomed, and expected to join projects related to their areas of experience as thought leaders and joint decision-makers?

CONDITIONS FOR SUCCESSFUL PARTNERSHIP

Objective

This area of inquiry addresses the question, “How can TFSC sites best position lived experts to participate impactfully?”

We explored how sites can effectively define roles and responsibilities for lived experience partners, as well as what specific onboarding and professional development support that they might need.

Process

Through the TFSC Lived Expert Roundtable forums, the taskforce solicited input from several lived experts participating in TFSC site projects. We also leaned on personal and professional experience of our taskforce members, as well as select resources provided to us by organizations that employ or contract with lived experience partners. The resources included sample project requests, consultant contracts, independent contractor agreements, memoranda of understanding, and compensation guidelines. Through this process, the taskforce was able to develop a scope of work checklist and a readiness assessment that can further assist TFSC sites in creating conditions for successful partnerships.

Findings

Lived experience partners are being invited to participate in the work of systems reform, but are not consistently being given clear parameters, scopes of work, and opportunities to negotiate compensation, or advocate when ongoing support is needed. As a result, some lived experience partners feel like they are merely providing a body at the table for sites to “check the box” on lived expert participation. The lack of clarity or clear ownership for deliverables limits the impact that lived experience partners can provide. Their contributions can be significantly enhanced with more clarity.

To make the best use of lived experience engagement, sites need to be intentional in how they are positioning lived experience partners and establish clear accountability for what and how lived expert partners are meant to contribute to the work. In fact, it should be a shared responsibility between sites and lived experience partners to clarify the conditions for success around lived expert engagement.

Some organizations have developed helpful frameworks or guidance that can serve as a model. For example, an organization called FosterClub requires that each lived expert leader who participates in their service activities is classified up front as a volunteer, employee, or contractor. This designation relates to the type of work they will perform and has further implications for their compensation package. The FosterClub compensation guide is included in the list of resources that follows, and an excerpt is shown immediately below.

LEx Leader Volunteer Service Member	Employee with Lived Experience	LEx Contractor - 1099
<ul style="list-style-type: none"> • Participates in one or more volunteer service opportunities (and any accompanying training, debrief, or reporting related to the performed service activity) for FosterClub or our partners. • Is supported by FosterClub staff in carrying out service activities. • Receives a living allowance or stipend, limited to Government Services Administration (GSA)-defined per diem maximums. • Compensation in excess of GSA per diem guidelines which reach \$600 or more in a calendar year is reported via 1099. 	<ul style="list-style-type: none"> • Conducts the same work as any other staff member. • Abides by policies outlined in FosterClub's Employee Handbook. • Receives benefits outlined for other staff. • Receives wages. • Supports Volunteer Service Members in carrying out service activities. • Is assigned a position that is defined as Exempt or Non-Exempt. 	<ul style="list-style-type: none"> • Conducts work similar to a staff member, but requiring specialized expertise (e.g. requirement the task be filled by a LEx Leader and/or that LEx is required to perform the work). • Paid a flat fee for doing a job outlined in a statement of work. • Work without FosterClub oversight and, instead, have only a reporting relationship with staff. • Complete a W-9. • Are not entitled to FosterClub benefits received by staff.
<p>This document is designed to provide guidance regarding compensation</p>	<p>If it is determined a LEx Leader will be an Employee or Contractor, hiring or supervising staff must work with HR and follow regular policies and practices for FosterClub personnel.</p>	

Provided by FosterClub

Recommendations

To create the conditions for successful partnership around lived expert engagement, TFSC sites should:

- Determine whether the correct role for a lived experienced partner is as a volunteer, consultant, or employee, based on the scope of work developed for a particular project or work stream.
- Provide a clear scope of work for lived experience partners who are engaged in all projects, including expected time commitment and project duration, specific deliverables, and other measures of success.
- Engage in conversations with lived experience partners before signing a contract and throughout the onboarding process to ensure that lived experience partners can make an informed decision around the project request.
- Implement a robust onboarding process for lived experience partners that includes an orientation to the project, key personnel, ways of working, and clear expectations. Onboarding should also include information about how and when compensation will be delivered, and what additional support is available.

- Provide professional support (i.e., coaching, check-in calls, professional development sessions, etc.) to lived experience partners in addition to their financial compensation so that they can explore and tap into their expertise, knowledge, and passion to contribute to the work most effectively.

Resources

1. [Checklist of Essential Information for LEX Job Posting, developed by Equitable Compensation Taskforce](#)
 - This checklist provides examples of information that prospective employers should share with lived experts when advertising a position or consulting opportunity.
2. [Readiness Assessment developed by Equitable Compensation Taskforce](#)
 - This readiness assessment can help site teams and organizations to better understand their readiness to meaningfully engage lived experience partners.
3. [Sample Project Request for Lived Experience Partners](#)
 - This project request is a document sent out to Jim Casey Fellows (lived experience partners) and contains the necessary information for them to make an informed decision about whether they can participate in the request.
4. [Example Memorandum of Understanding \(MOU\) Template](#)
 - This sample Memorandum of Understanding (MOU) sets forth the terms and conditions between organizations and contractors. This document outlines the parties' understanding and expectations regarding the contractor and their scope of work.
5. [Sample Associate Youth Engagement Consultant Contract](#)
 - This sample associate youth engagement consultant contract provides an example of what to include in the scope of work for this type of position.
6. [Sample Independent Contractor Agreement](#)
 - This sample independent contractor agreement provides an example of what to include in the scope of work for an independent contractor.
7. [FosterClub – LEX Leader Service Members Compensation & Support Guidelines](#)
 - This document outlines FosterClub's policies surrounding the support for Lived Experience (LEX) Leaders' participation in service activities.
8. [Allegheny County, Pennsylvania Example of LEX Roles for Youth](#)
 - This brief case study outlines how Allegheny County, Pennsylvania has developed several strategies to engage youth in system improvement efforts.

COMPENSATION FORMULA

Objective

This area of inquiry addresses the question, “How much should sites pay lived expert partners?”

To answer this question, we collected information on current lived expert compensation rates, evaluated existing rates of pay and other financial supports, and developed recommendations to help sites set equitable compensation rates.

Process

The taskforce examined and carefully reviewed various data and resources to assess the current conditions of compensation across TFSC sites, as well as resources that reflect best practices in the larger ecosystem of compensation for lived experience partners. We learned from participants in the Lived Experience Roundtable discussions about what is currently not working for them, and where lived experience partners felt there should be more intention as it relates to compensation and or supports that support engagement. We also reviewed information regarding compensation from the first four sites to join Thriving Families, Safer Children (Colorado, Los Angeles County, Nebraska, South Carolina). Finally, members of the taskforce conducted additional research and material gathering outside of TFSC.

Findings

Based on compensation information collected from Thriving Families, Safer Children sites prior to the establishment of this taskforce, rates of pay for lived experience partners ranged from no compensation to \$100/hour. Clearly rates of compensation vary widely and meaningful contributions by lived experience partners are sometimes not recognized financially at all. Reactions to the current state of compensation are mixed. Some lived experience partners feel that they are being paid equitably, but others face genuine barriers to participation due to limited or no compensation.

Budgets allocated for lived experience compensation and support are typically established by the organizations that deliver compensation, which can include national philanthropic organizations such as Casey Family Programs, third-party organizations such as Cetera that establish Service Agreements with lived experience partners, local nonprofit organizations, and jurisdictional government agencies. The hourly rates vary most based on the contracting organization, rather than the role of the lived experience partner or their location. The most well-compensated lived experience partners often have contracts set up through national organizations with a standard rate of pay, and some have built in support through other agencies such as Generations United.

Among the data we collected, some findings may serve as helpful guideposts for Thriving Families sites seeking to establish an equitable rate of pay for lived experience participants. For example:

- In Colorado, lived experience partners working on TFSC initiatives are paid \$50/hour, in accordance with the policy of Illuminate Colorado (the backbone organization that coordinates the work of the Colorado Partnership for Thriving Families).
- Outside of Thriving Families, the Colorado Department of Human Services compensates members of its Family Voice Council at \$25/hour.
- In South Carolina, TFSC lived experience partners are paid \$30/hour through the Federation for Families.
- Nebraska has established a TFSC statewide compensation model of \$25/hour for individuals with lived experience. The Nebraska Department of Health and Human Services also reimburses individuals for mileage and offers \$5/hour for childcare, to a maximum of \$50/day. The NE Children's Foundation provides similar compensation for mileage and childcare.
- The Washington, DC site team created a compensation model for lived experts working on Thriving Families, Safer Children in which each lived expert earns \$25/hour, and the total possible compensation value differs based on the type of contribution. The list of resources includes more information about this compensation model and the opportunity tiers.
- Youth Advisory Board members in Allegheny County, PA are paid \$20/hour.
- Casey Family Programs pays individuals with lived expertise nationwide a rate of \$100/hour.

In order to secure the participation of lived expert participants, the rate of hourly compensation needs to be competitive with other opportunities available to them. This means that rates of compensation should, at a minimum, reflect a living wage in the local area so that individuals can consider their work on these projects as a viable alternative to other local employment opportunities. Although working in this field may have strong appeal to prospective lived experience partners, the financial imperative to earn a living wage is an essential factor in considering job offers and cannot be overlooked. To this end, over time sites should adjust their compensation rate to account for cost-of-living adjustments.

Lived experience partners in the Roundtables also expressed that additional types of compensation may be necessary for them to fully show up for the work. Individuals face additional costs to engage in the work, such as technology, childcare, and transportation. Additional supports that are specific to the living conditions of many lived experts go a long way toward making their participation financially feasible. These supports are currently being provided by some sites as a regular practice, while others do not reflect the same level of support. These practices have also been reflected in the grantee budgets.

Recommendations

Because rates of compensation should most importantly align with local market rates and reflect the specific terms of the engagement, the taskforce was unable to define a universal formula for sites and partner organizations to compensate lived experts. Instead, we recommend that each site or employer

apply a specific set of criteria to determine a fair rate of compensation. We also recommend that to establish a rate of compensation that is equitable for lived experience partners, that TFSC sites:

- Create local compensation models in partnership with lived experience partners that:
 - Consider the local cost of living, local organization salary bands, and the specific roles/responsibilities of the lived experience partners.
 - Are clear, consistent, and transparent.
- Establish rates of payment between the state living wage and up to \$100/hour, to align with existing practices of other TFSC sites and national partner organizations. If possible, we recommend a starting point of at least \$25/hour.
- Consider creating a range of hourly compensation rates that also account for the skill sets and professional experience of participants (i.e., training facilitator, coaching experience, project management, etc.).
- Develop a supplemental budget to provide additional support (i.e., technology, childcare, transportation, etc.) that may support lived experience partners to participate in projects/requests.

Resources

1. [Nebraska Department of Health and Human Services Example of How to Establish LEX Compensation Rates](#)
 - This case study showcases the efforts taken on by the Nebraska Department of Health and Human Services alongside lived experience partners to develop a system of internal policy to compensate those individuals.
2. [State of Nebraska – Work Instructions Document for Compensating Individuals with Lived Experience](#)
 - This sample Memorandum of Understanding (MOU) sets forth the terms and conditions between organizations and contractors. This document outlines the parties' understanding and expectations regarding the contractor and their scope of work.
3. [Washington, DC Example of LEX Roles and Compensation Rates](#)
 - This content from Washington, DC showcases the intentional effort that was made to explore ways in which this TFSC site can actively engage lived experience partners in the work. It includes the types of roles and total compensation allocated for each opportunity.
4. [TFSC Site Compensation Pay Rates](#)
 - This chart is an initial compensation scan across four TFSC jurisdictions in March 2021.
5. [TFSC Sites Minimum Wage vs. Living Wage Chart](#)
 - This chart provides a comparison of minimum wage and living wage for individuals with one dependent in each of the TFSC sites. It is included as a point of reference for sites regarding the minimum viable hourly rate for lived expert participants working in their state.

ISSUING COMPENSATION

Objective

This area of inquiry addresses the question, “How should sites pay lived expert partners?”

The taskforce aimed to research the available options to issue streamlined payments to lived experience partners, understand potential tax implications and agency restrictions, and learn more about the “benefits cliff” in order to provide transparent guidance for sites to utilize with lived experience partners as it relates to compensation and benefits.

Process

The taskforce explored partnership strategies that are being utilized by foundations, organizations, and systems to help with issuing compensation. Members of the taskforce interviewed an organization that uses a third-party payer to compensate lived experts and explored how these partnerships work, what organizations and agencies could consider when exploring these partnerships, and the benefits of these arrangements. The taskforce also explored what it would mean to prioritize the needs of lived experience partners in compensation conversations and specific processes for issuing payment.

Findings

In Lived Experience Roundtable conversations, some lived experience partners shared that current processes include many steps to receive compensation. Some individuals received compensation four months after completing the initial work, and others shared that the current payment approaches did not meet their needs as individuals. The delay in receiving compensation had significant impacts on individuals’ ability to maintain fiscal solvency. This prompted the taskforce to explore what it would take to streamline payment process, including by issuing payments through community organizations such as churches, local non-profits, or other entities.

Through a conversation with leaders at Cetera, a Florida-based organization that compensates individuals with lived experience, we collected ideas about how to effectively compensate LEX partners:

- Cetera has a relationship with a local credit union, which means that individuals only need to share their personal information with the credit union, keeping it safe and secure. The credit union issues payment via direct deposit (ACH).
- Cetera also provides alternative means through which lived experience partners can receive their compensation. Specifically, individuals can receive payment using Cash App or Venmo, which eliminates the need for recipients to have a bank account. This allows for quick turnaround and receipt of payment on the same day or next day. It also benefits the organization because it is no longer strained on capacity to push payments.

Although payments through a financial intermediary can be more flexible to meet the needs of lived experience partners, it is important to establish that it is not an emergency fund. This prevents agency capacity and process strain. Additionally, having upfront conversations about the organization's compensation flexibility and limitations such as processing time for issuing payments would serve both the serving organization and lived experience partners.

Lived experience partners also identified that unexpectedly encountering the “benefits cliff” is another pain point regarding issuance of compensation: The benefits cliff is a sudden decrease in public benefits that can occur with a small increase in earnings or income. Some lived experience partners were not aware that their compensation from Thriving Families, Safer Children initiatives could increase their total income to a level that impacted their benefits eligibility. Sites would need to explore policy change to comprehensively address the benefits cliff that lived experience partners have experienced. However, in the short term, lived experience participants would benefit from knowing about the benefits cliff to make an informed personal decision about accepting an employment or consulting opportunity with Thriving Families, Safer Children.

Recommendations

To issue compensation to lived experience partners in a manner that is streamlined and transparent, the taskforce recommends that TFSC sites:

- Design compensation processes to ensure prompt delivery of payment – through a third-party intermediary if necessary – and set clear expectations with lived experience partners about how it works.
- Offer flexible payment options in recognition that some individuals may not have traditional bank accounts.
- Using the materials developed by the taskforce and provided in the resources section, share basic information about the benefits cliff with lived experience partners during contract negotiations, so that individuals can make an informed decision about accepting the role.
- Consider advocating for changes in policies that currently lead to reduction in public benefits for lived experience partners.

Resources

1. [Cetera Case Study developed by Equitable Compensation Taskforce](#)
 - This case study showcases a TFSC partner organization based in Florida, which compensates lived experience partners. This case study speaks about the innovative compensation solutions that would support streamlining payments to lived experience partners.
2. [Conversation Guidance Scripts developed by Equitable Compensation Taskforce](#)
 - This document is a script that lived expert participants can use as a guide for conversations about potential work opportunities. This guide provides an outline of how to frame the conversation as well as some questions to ask.

SUSTAINABILITY

Objective

This area of inquiry addresses the question, “How can sites finance the compensation for lived expert partners?”

We examined potential philanthropic and public funding sources for lived experience partner compensation, including the processes, limitations, and opportunities for both. Our goal was to determine if there is a way by which lived experience partner compensation can be funded reliably and sustainably on the public dollar.

Process

The taskforce conducted conversations with TFSC partners from Casey Family Programs around funding sustainability to gain further insight on work that has been done or current ongoing work in this area. We also reviewed a case study example from the TFSC site team in Nebraska on how this site has established a process to utilize state funding to compensate lived experience partners. Lastly, much of the research that informed the work of this taskforce around this area was gathered and brought to the taskforce for review by David DeStefano, Senior Consultant at The Stephen Group.

Findings

For sites to uphold the value of equitably compensating lived experience partners, they need to have sustainable funding sources to fund the work, time, and expertise of lived experience partners. Philanthropy is the most flexible funding source, but it is not predictable or sustainable. Because philanthropic funding is typically allocated on an annual basis and will vary based on the priorities of the foundation, it should be considered mostly for the early stages of site work before sustainable public funding sources are identified. It may also be helpful for emergency funding but should not be built into long-term budgets as a reliable source to support lived experience partners. It would do a tremendous disservice to the lived experts if they commit to work for which funding becomes no longer available due to changes in philanthropic priorities.

For the usage of public dollars, it is important that sites allocate line items within the budget to pay lived experience partners as employees or contractors. There are five commonly used federal grant sources that sites should explore but not limit themselves to:

1. **Substance Abuse and Mental Health Services (SAMHSA) grants:** SAMHSA offers grants to support the development and implementation of behavioral health programs and services. These grants may be used to compensate persons with lived experience who participate in the planning and implementation of programs.
2. **Administration for Children and Families (ACF) grants:** ACF offers a variety of grants to support the development and implementation of programs related to child welfare, youth development,

and other related areas. These grants may be used to compensate persons with lived experience who participate in program planning and implementation activities.

3. **National Institutes of Health (NIH) grants:** NIH offers grants to support research related to health and medical topics. These grants may be used to compensate persons with lived experience who participate in research projects as advisors or co-investigators.
4. **Centers for Disease Control and Prevention (CDC) grants:** CDC offers grants to support public health initiatives related to a variety of health issues. These grants may be used to compensate persons with lived experience who participate in the development and implementation of public health programs.
5. **Department of Justice (DOJ) grants:** DOJ offers grants to support initiatives related to criminal justice, including programs focused on juvenile justice and reentry. These grants may be used to compensate persons with lived experience who participate in program planning and implementation.

The taskforce also identified several programs outside of Thriving Families, Safer Children that are funded with public dollars and may serve as exemplars:

- In Michigan, Youth Peer Support Services is a service funded through Medicaid with the goals of the supporting youth and young adults by building a strong relationship based on mutual respect and strategic self- disclosure.
- In New Hampshire, the Family Wraparound program funds both family and youth peer specialists with lived expertise to work as part of the interdisciplinary team assigned to assist a family. The allowability of funding for peer-support services has become common within behavioral health and substance abuse.

Recommendations

To achieve sustainability in compensating lived experience partners, the taskforce recommends that TFSC sites:

- Engage legislative partners at both the state and federal level to create a new funding framework which would clearly require the engagement of persons with lived experience in the development of local system responses designed to address the needs of children and families.
- Include lived experience partners in program designs to ensure that compensation related factors are considered at the time of implementation.
- Include compensation for lived experience partners as a clearly identified agency budget line item.
- Integrate lived experience partners into project development and implementation activities in grant applications and include a request for related grant funding.
- Review federal funding sources in comparison to expectations of lived experience partners to determine whether specific activities are eligible, allowable, and reimbursable based on funding guidelines.

- When necessary, update related state programs and cost allocation plans and submit for approval.
- Maintain accurate documentation of compensation provided to lived experience partners, including the amount of compensation, date it was provided, specific work or contributions lived experience partners provided.
- Include information pertaining to the use of federal funds to compensate lived experience partners in reports to the funding agency to reinforce that this work is being done and to show federal funding agencies the benefits of this work.
- Develop and implement strategies for securing funding for compensating lived experience partners outside of state or federal sources.

Resources

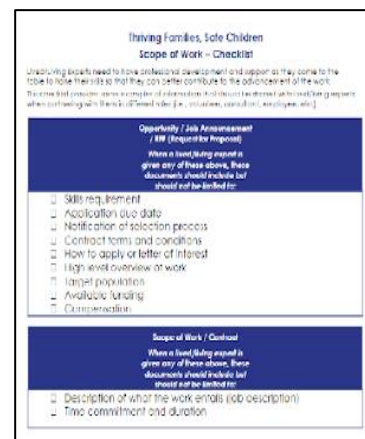
1. [Research on Sustainable Funding for Persons with Lived Experience by David DeStefano](#)
 - This summary document provides an overview of strategies to involve, engage, and compensate lived experience partners; things that organizations or funders should consider when providing compensation; potential federal funding sources; key considerations when using federal funding; and additional strategies to ensure funding sustainability.

RESOURCES

The following are links to each of the resource materials listed throughout the report.

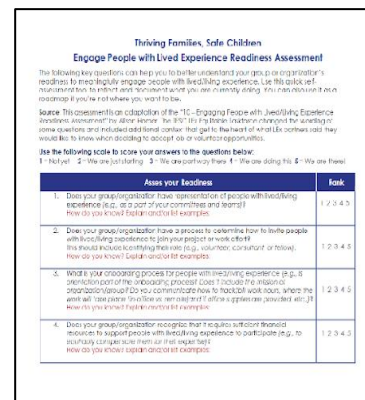
[Checklist of Essential Information for LEX Job Posting, developed by Equitable Compensation Taskforce](#)

This checklist provides examples of information that employers should share with lived experts when advertising a position or consulting opportunity.



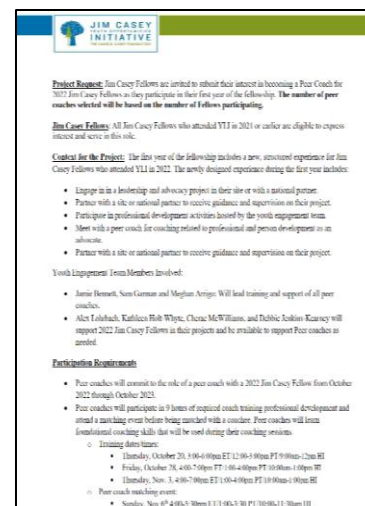
[Readiness Assessment developed by Equitable Compensation Taskforce](#)

This assessment can help site teams and organizations to better understand their readiness to meaningfully engage lived experience partners. Site teams can use this quick self-assessment tool to reflect on current practices or establish a roadmap for improvement. This assessment is an adaptation of the [“10 – Engaging People with Lived/Living Experience” readiness assessment by Alison Homer \(2019\)](#).



[Sample Project Request for Lived Experience Partners](#)

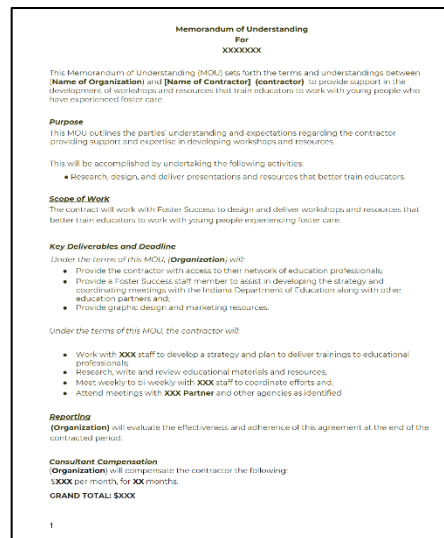
This project request is a document sent out to Jim Casey Fellows (lived experience partners) through the Jim Casey Youth Opportunities Initiative and contains the necessary information for them to make an informed decision about whether they can participate in the request. Sites can modify and share with potential lived experience partners.



RESOURCES

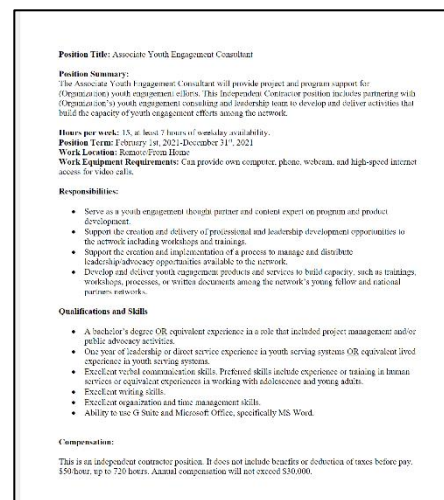
[Example Memorandum of Understanding \(MOU\) Template](#)

This sample Memorandum of Understanding (MOU) sets forth the terms and conditions between organizations and contractors. This document outlines the parties' understanding and expectations regarding the contractor and their scope of work.



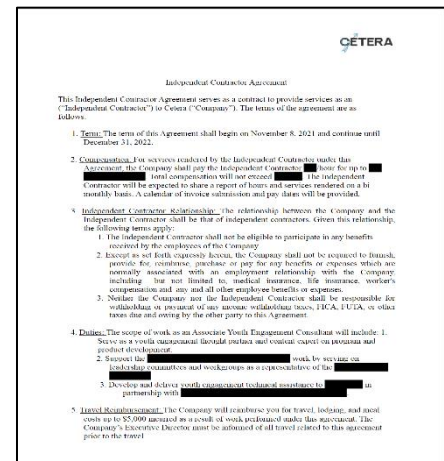
[Sample Associate Youth Engagement Consultant Contract](#)

This sample associate youth engagement consultant contract provides an example of what to include in the scope of work for this type of position.



[Sample Independent Contractor Agreement](#)


This sample independent contractor agreement provides an example of what to include in the scope of work for an independent contractor.



RESOURCES

FosterClub – LEx Leader Service Members Compensation & Support Guidelines

This document outlines FosterClub’s policies surrounding the support for Lived Experience (LE) Leaders’ participation in service activities.



LEx Leader Service Members Compensation & Support Guidelines

This document outlines FosterClub’s policies surrounding the support for Lived Experience (LE) Leaders participation in service activities on behalf of FosterClub.

Defining a LEx Leader’s role at FosterClub: When an individual with LE is engaged with FosterClub, they must first be clearly classified as either a Volunteer Service Member, Employee, or Contractor.

LEx Leader Volunteer Service Member	Employee with Lived Experience	LEx Contractor - 9999
<ul style="list-style-type: none"> • Participates in or is the primary provider of volunteer service opportunities that may accompany training, research or reporting related to the performed service activity for FosterClub or our partners. • Is supported by FosterClub staff in carrying out service activities. • Receives a living allowance or stipend, linked to Government Expenses Administration (GSA) and/or other reimbursements. • Compensation is in excess of \$16,000 per guidelines which exceed \$600 in more than a single year (as reported via 1099). 	<ul style="list-style-type: none"> • Conducts the same work as any other staff member. • Assists by providing technical or professional expertise. • Receives benefits outlined for staff. • Receives wages. • Supports Volunteer Service Members in carrying out service activities. • Is assigned a position that is defined as Contract or Non-Contract. 	<ul style="list-style-type: none"> • Conducts work similar to a staff member, but requiring specialized knowledge or qualifications that have not been fully met by a staff member. • If a LE is required to perform the work, it is required to be a subcontractor. • Works without FosterClub oversight and outside the scope of a reporting relationship with staff. • Completes a W-9. • Also not entitled to FosterClub benefits (e.g. health insurance).
<p>This document is designed to provide guidance regarding compensation and support for FosterClub personnel.</p> <p>If it is determined a LEx Leader will be an Employee or Contractor, it is the responsibility of the staff member who will hire and follow regular policies and practices for FosterClub personnel.</p>		

The intention of this document is to clarify FosterClub policy on the distribution of a living allowance or stipend to support a LEx Leader’s Volunteer Service.

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Allegheny County, Pennsylvania Example of LEX Roles for Youth

Allegheny County, Pennsylvania has developed several strategies to engage youth in system improvement efforts.

1. **Youth Support Partner Unit:** The Youth Support Partner Unit is a peer mentorship program. The Youth Support Partners (YSPs) have been in foster care, juvenile probation, or mental health services. They have credibility with young people because they understand what it's like to be in their shoes. The special connection that a YSP has with a youth allows them to champion the youth through difficult experiences and help them take advantage of system resources.

Youth Support Partners are full-time, salaried staff with benefits. In addition to the one-on-one coaching they provide to youth, they are also valued partners in our system change efforts. For example, they sit on our RFP evaluation committees to score our contracting proposals. They also attend "Children's Cabinet," a quarterly meeting where solutions to improve how youth are served are brainstormed and discussed and serve on various internal working groups related to grant implementation efforts. Youth are provided with professional development and training for their future careers – so serving on these committees is of benefit to both the local child welfare system and the youth.

1. **SITY (Systems Improvement Through Youth):** Established in 2009, SITY a youth advisory board comprised of 10 individuals, ages 14 through 23 years, transitioning from child-serving systems including: child welfare, mental health, developmental supports, juvenile justice, and drug and alcohol. Youth apply to participate on the board because they have a desire to improve the child welfare system.

SITY meets weekly and participating youth receive paychecks for their work (\$20/hour). Internal leadership, as well as external partners and providers, regularly attend SITY to ask for their perspective. SITY members advise on grants – for example, they were a critical partner in the development of a HUD Youth Homelessness Demonstration Program. SITY members also attend Children's Cabinet quarterly meetings and are vocal participants in these discussions.

3. **Focus groups & Surveys:** In addition to the formal groups mentioned above, we solicit feedback from a broader range of youth through focus groups and surveys. Youth are compensated for participating, typically through a gift card.

RESOURCES

Nebraska Department of Health and Human Services Example of How to Establish LEX Compensation Rates

In 2022, a team of employees at the Nebraska Department of Health and Human Services (NDHHS) Child Welfare division, in collaboration with community organizations and individuals who identify as having lived experience, began developing a system of internal policy to compensate those individuals. This team recognized the importance of hearing the input of those with lived experience when designing, implementing, and improving social policy and sought to make the process of giving feedback and testimony more accessible. To ensure that this feedback was a legitimate factor in agency decisions, they developed a compensation protocol policy. This policy was spearheaded by Rebecca Daugherty, under the leadership of Stephanie Beasley, the Director of the Child Welfare division.

The policy development process began with consulting individuals within the community and community organizations to identify existing successful models of compensation. Additional conversations then took place with NDHHS staff, individuals who have experienced engagement with the department, and those who had experienced system impacts to inform the team as to what additional support was necessary. By engaging in an ongoing discussion surrounding this policy, the Nebraska Department of Health and Human Services was able to create a compensation policy which centralized the needs of individuals with lived experience, and prioritized their feedback and ideas to create a policy which was beneficial to all.

The policy defines a standard compensation rate of \$25/hour for each individual with lived experience. To ensure that individuals can participate without fear of compromising their public assistance benefits or other sources of income, the team recommended the development of a toolkit with information for participants on how compensation would affect taxable income and other benefits. Furthermore, the team proposed the development of an accountability system to prioritize the recommendations and feedback from those individuals when developing and implementing any new regulations.

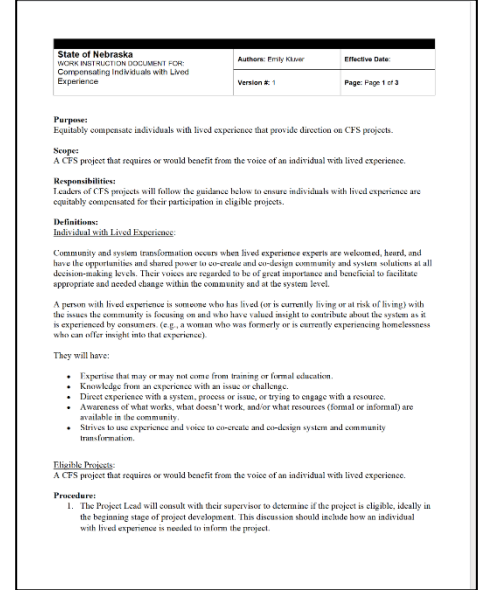
Once the policy was in place, NDHHS began to create and implement a plan to ensure that individuals with lived experience were able to access the compensation they deserved. They created a payment system utilizing Nebraska state general funds, and provided training and support for individuals receiving compensation when the program was launched. An additional process was established to recognize and reward individuals with lived experience who contributed their time and expertise directly to state workgroups looking to develop and revise internal policies and procedures. This process included a review of existing policies and procedures, best practices from other states and national organizations, and feedback from stakeholders within NDHHS.

The policy has been instrumental in creating a more equitable and meaningful relationship between NDHHS and its clients. It has allowed the agency to recognize and reward individuals with lived experience, creating a more inclusive and empowering atmosphere for all involved. Overall, the development and implementation of this policy has shaped how individuals with lived experience are valued within the Nebraska Department of Health and Human Services.

RESOURCES

State of Nebraska Work Instruction Document for Compensating Individuals with Lived Experience

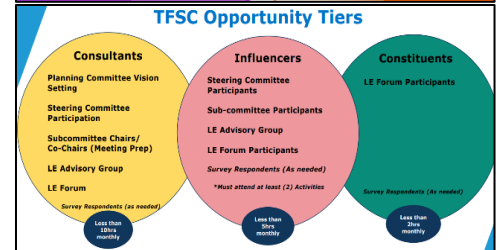
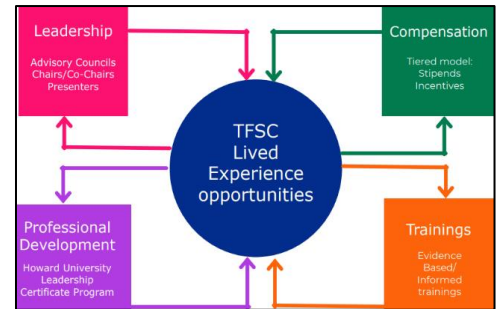
This sample Memorandum of Understanding (MOU) sets forth the terms and understandings between organizations and contractors. This document outlines the parties' understanding and expectations regarding the contractor and their scope of work.



Washington, DC Example of LEX Roles and Compensation

The site of Washington DC has made an intentional effort to explore ways in which their site can actively engage lived experience partners in the work. This team developed a unique and tailored system to the needs of lived experience partners and the DC local area. As a part of their strategic plan and model, they have developed a hyper-focused plan on engaging lived experience partners in different levels.

They have identified three different roles for lived expert participants and defined the total compensation available to each, based on the amount of time they are expected to contribute.



Breakdown by Opportunity Tiers

How we got here:

- Collaboration with external partners
- Scan of other community-led incentive opportunities
- Desire to grow our LE Community

Things to consider:

- Forums to occur every 6 to 12 months
- Funds available to all interested LE individuals
- Possible tax implications

Groups	What	How Much	How Long	Formula	Total Possible Value	Options	Target #
Consultants	Leadership	\$25/hour	6 months	\$25 X 10hrs X 6mos	\$1,500.00	ACH Direct Deposit/ Visa Gift Cards	5
Influencers	Subject Matter Experts (SMEs)	\$25/hour	6 months	\$25 X 5hrs X 6mos	\$500.00	ACH Direct Deposit/ Visa Gift Cards	10
Constituents	Respondents	\$25/hour	6 months	\$25 X 2hrs X 6mos	\$300.00	Visa/Non-cash Gift Card	15

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TFSC Site Compensation Pay Rates

This chart represents an initial compensation scan across four TFSC jurisdictions in March 2021.

Site	CFP National Partner hourly rate, if applicable	Direct Jurisdiction Hourly Rate(s) for TFSC Work, if applicable	Local Community Org Hourly Rate(s) for TFSC Work, if applicable	Additional Information
Colorado	\$100	N/A ¹	\$50 ² , via Illuminate Colorado policy, funded via CFP agreement/investment	TFSC national consultants for co-design work (ChiByDesign and idea42) have indicated they reimburse constituents for limited / onetime interviews or focus groups @ \$25/hour, which is part of TFSC.
LA County	\$100 per hour for one constituent through Casey contract with LA County consultant,	N/A	Local philanthropic org is paying other constituent and the rate is not known. All other constituents are participating as part of their "primary jobs."	
Nebraska	\$100	\$18 per hour from DHHS	\$20-\$30 per hour from NE Children Foundation depending on role of the participant. ³	DHHS Jurisdiction Max is \$600 per year. In addition, they pay for mileage and \$5 per hour for child care. Maximum \$50 per day. NE Children Foundation also provides similar mileage and child care.
South Carolina	\$100		\$30 via the Federation for Families	

¹ And, while not for TFSC, CO DHS has a long standing Family Voice Council at \$25/hour
² Negotiated up from \$25 per hour, following the TFSC learning session in March 2021
³ NE Children is currently the primary funder for the compensation of local TFSC participants

TFSC Sites Minimum Wage vs. Living Wage Chart

This chart provides a comparison of minimum wage and living wage with the addition of one dependent. Sites can use this as a baseline to inform their compensation rates, in the absence of existing policies. This information is sourced from [Massachusetts Institute of Technology](#).

	Current Minimum Wage	Minimum Livable Wage 1 adult/no Children	Minimum Wage for 1 adult/1 child
Arizona	12.8	17.43	32.22
District of Columbia	16.1	23.13	23.34
Florida	10	17.24	32.14
Idaho	7.25	16.18	22.35
Indiana	7.25	15.79	29.15
Kansas	7.25	16.75	32.74
Kentucky	7.25	15.46	34.49
Maryland	\$12.50	\$19.74	\$37.58
Minnesota	10.13	\$17.74	\$34.46
New Hampshire	\$7.25	\$17.32	\$33.01
New Jersey	\$13.00	\$20.57	\$41.90
New Mexico	\$11.50	\$16.25	\$31.53
New York City	\$15.00	\$25.42	\$43.18
Oklahoma	\$7.25	\$15.75	\$30.94
Oregon	\$12.50	\$19.51	\$36.56
Texas	\$7.25	\$16.41	\$31.63
Virginia	\$11.00	\$19.40	\$36.30
White Earth Nation			
Colorado	\$12.56	\$20.51	\$39.48
Los Angeles County/California	\$15.00	\$21.89	\$44.71
Nebraska	\$9.00	\$16.60	\$32.79
South Carolina	\$7.25	\$17.47	\$31.33

Cetera Case Study for Issuing Compensation

This document shares lessons learned from Cetera on how they issue payment to lived experience partners.



RESOURCES

[Conversation Guidance Scripts](#)

This document is a script that should be used by individuals with lived expertise to prepare for a conversation with organizations about potential work opportunities. This guide provides an outline of how to frame the conversation as well as some questions to ask.

**Draft of Conversation Script/Questions for LEx Partners
From the Benefits Cliff Workgroup
January 30, 2023**

This script should be used as a guide to help you have the conversation with the potential work opportunity. Below we have provided an outline of how to frame the conversation and some questions to ask!

Scenario 1: Project Overview and Expectations

Person A = You
Person B = The organization representative that is proposing the scope of work.

A: Hi! How are you today?
B: -response-
A: I really appreciate that you've made the time to be here. I wanted to make sure I understand the scope of work for this potential work opportunity.
B: -response-
A: I would like to discuss the project overview and expectations for this potential assignment.
• See the list of questions below pertaining to this section.
B: -response-
A: Thank you for clarifying the expectations and overview of this project.
B: -response-
A: This is all I had planned to discuss today! Can I have x amount of time to think about accepting the project?
B: -response-
A: Thank you for your time today! I look forward to meeting with you! Have a great day! Bye.
B: -response-

Scenario 2: Compensation, Training, & Professional Development

Person A = You
Person B = The organization representative that is proposing the scope of work.

A: Hi! How are you today?
B: -response-
A: I really appreciate that you've made the time to be here. I wanted to make sure I understand the compensation, training, & professional development that is offered from the scope of work.
B: -response-
A: I would like to discuss the compensation, training, & professional development for this potential assignment.
• See the list of questions below pertaining to this section.
B: -response-
A: Thank you for clarifying the expectations and overview of this project.
B: -response-
A: This is all I had planned to discuss today! Can I have x amount of time to think about accepting the project?
B: -response-
A: Thank you for your time today! I look forward to meeting with you! Have a great day! Bye.
B: -response-

[Research on Sustainable Funding for Persons with Lived Experience by David DeStefano](#)

This document summarizes research done by taskforce member David DeStefano, who specializes in policy around sustainability in compensation. This document provides an overview of strategies to involved, engage, and compensate persons with lived experience in child welfare, things that organizations or funders should consider when providing compensation, federal funding sources, key considerations when using federal funding, and additional strategies to ensure funding sustainability.

Funding & Sustaining LEx Engagement in Leadership, Program Design, Implementation

The engagement of persons with lived experience is moving to the forefront of program design, implementation, and service provision in child welfare and related systems. Looking to financially sustain their participation is critical to the ongoing engagement of individuals with prior experience. Options for funding are varied and likely will require up-front consideration and advance planning, especially when it comes using capped federal funding sources, which may be fully obligated to other services and activities, or expanding use of open federal sources, such as Title IV-E or Medicaid, which may require modifications to state plans.

Peer involvement in the provision of services has been successful at a national level in the areas of mental health and substance abuse and federal funding is available to support specialized training and payment for peer support specialists and mentors with lived experience. In these systems PEs provide a variety of services including developing formal and informal supports, instilling confidence, assisting in the development of goals, serving as an advocate, mentoring, or facilitating the resolution of issues and skills necessary to enhance and improve overall health of individuals served by the programs. These supports play an essential role in helping to build the resiliency of caregivers and youth and strengthen the capacity of families to care for children at home. Family and youth peer support providers are integral to teams serving children and youth with behavioral health challenges and their families and are distinct from traditional mental health service providers in that they operate out of their personal experience and knowledge.

In Michigan, the provision of peer support has been expanded to include youth and young adults with serious emotional disturbance/serious mental illness (SED/SMI) through shared activities and interventions in the form of Non-Judgmental Support, Connection through Lived Experience, and Supporting Self-Advocacy. The goals of the state's Youth Peer Support program include supporting youth and young adults by building a strong relationship based on mutual respect and strategic self-disclosure. These activities increase hope, confidence, self-advocacy skills, and decision-making abilities. Youth Peer Support Specialists promote hope and acceptance by sharing their story of lived experience to reduce stigma and increase youth voice and ownership in services. Youth Peer Support Services assist and prepare youth and young adults to successfully navigate challenges, support opportunities for youth/young adults to have a voice in planning and decision-making, empower youth/young adults to communicate wants and needs to those involved in their lives, and encourage participation in services and daily activities. Services are funded by Medicaid as part of Michigan's Early Periodic Screening

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- Patricia “Patty” Chin, Annie E. Casey Foundation
- Rebecca Daugherty, Lived Experience Partner
- David DeStefano, The Stephen Group
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- Justin Kidder, Think of Us/ Lived Experience Partner
- Dae’Shawn Nixon, Casey Family Programs
- Bobbi Taylor, Proximate Solution Consulting
- Dawn Triplett, Casey Family Programs
- Alexandria Ware, Lived Experience Partner

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