

PAYMENT POLICY FOR PATIENT AND PUBLIC INVOLVEMENT (PPI) CONTRIBUTIONS

Project: Addressing psychological morbidity in informal carers of patients at the end of life (EOL): evidence synthesis and stakeholder consultation to produce tailored, evidence-based information and priorities

(Helping people stay in good health when looking after someone at end of life)

Introduction

This document outlines the policy on payments and expenses for members of the public contributing to our project.

This policy tells you:

- What we mean by PPI contributor
- What we regard as reasonable project expenses
- What fees will be paid for your time, skills and participation
- When and how these fees will be reimbursed
- Your responsibilities in paying tax and NI contributions
- Your responsibilities when receiving state payments
- What to do if there is a problem.

Definition of PPI contributor

People are eligible to contribute to PPI activities on the project if they are a patient or are supporting a family member, partner, friend or neighbour at the end of life, or have done so in the past.

What we will pay in expenses

We will reimburse you for all reasonable and necessary expenses incurred as a result of your involvement in the research programme. These will either be paid directly in advance (e.g. by project staff purchasing travel tickets on your behalf) or by you being reimbursed after the event (e.g. by covering out-of-pocket expenditure that you have already incurred as a result of working on the project).

To have your travel costs paid directly in advance, please provide project staff with your travel requirements as soon as possible and at least two weeks before an event.

If you wish to pay for your own travel and be reimbursed, you will need to complete a claim form and provide your bank or building society details. Claims forms are available from project staff and/or in person at meetings. The project will hold a pool of petty cash for immediate reimbursement of small travel claims (less than £10).

If you wish to have your expenses reimbursed, you will need to provide original receipts for everything that you have paid for. Claims without receipts will not be paid. If you are

in any doubt about whether you are entitled to have your expenses reimbursed, please check with the project team before spending any of your own money.

Expenses we will cover

In line with INVOLVE (2016) guidance we will cover:

- **Travel costs:** Public transport should be used wherever possible and practical at standard class or cheaper day rates.

Mileage allowance for car users will be covered where car travel is necessary, at a rate of 40p per mile for the first 50 miles and 23p per mile for the rest of journey. Car parking fees may be claimed where car travel is necessary. Parking or speeding fines do not qualify for reimbursement.

If you wish to use your own car to attend project meetings, you should discuss these arrangements with staff two weeks before the event to ensure any subsequent mileage claims will be approved.

Taxi fares will be reimbursed in instances where the circumstances justify the costs incurred. Air travel may be used where this is appropriate and cheaper than other forms of transport. You will need to prior agreement for air travel from the project team.

- **Accommodation:** We will provide overnight accommodation where it is required. This will be when a meeting or event takes place over more than one day or you would have to make an unreasonably early start to get to a meeting or your journey time makes travel in a day unfeasible.

We can book hotel accommodation for you in advance. This often means we can secure a reduced rate and a better deal for your travel, If you think you will need accommodation please ask the project team at least two weeks in advance.

If you wish to book and pay for hotel accommodation when it is required, we will reimburse costs up to 3-star rating. We are unable to reimburse costs of accommodation with a higher rating unless this is unavoidable. Our reimbursement limits are £100 per person per night including breakfast and VAT elsewhere.

If you choose to stay with a relative or friend, we are not able to cover their costs.

- **Meals and refreshments:** the project team will usually provide meals and refreshments for meetings. If you need additional refreshments while travelling, sometimes referred to as subsistence, these costs will be reimbursed as long as they are reasonable, and you can provide original receipts. These receipts need to be itemised wherever possible. Subsistence costs are meal and refreshment costs incurred away from home when on project business for more than three hours, over a recognised meal time. Costs for alcoholic drinks will not be reimbursed.

Payment of Fees

Like INVOLVE, we use the word 'fee' to describe the money you will be offered in recognition of your time, skills and expertise.

All fees offered are honorarium payments. They are a form of recognition offered for the contribution that you, as a member of the public, make to our work. This does not mean you have a contract of employment with project, or with the University of Manchester.

As a member of the public actively involved in the project, you will be offered a fee whenever we ask you to undertake a specific task. These tasks may be things like attending a Research Advisory Group (RAP) meeting, attending a stakeholder workshop or reviewing documents for the project. We will always pay a fee for the tasks and training that we ask you to undertake, and these activities will always be relevant to the project.

Additional training and personal development opportunities may arise during the course of the programme, and these will be offered on a volunteer 'no-fee' basis. We will discuss these opportunities with you when they arise and inform you in advance when the no-fee condition applies.

We will always make it clear what fees will be offered when inviting you to take part in our work. It is then your choice whether or not to take part, and whether or not you accept any or all the payment that is offered.

You are not obliged to accept the fee that is offered to you. If you would prefer not to receive it, or to receive a lower amount, please let the project team know. Contact details for these people are provided at the end of this document. **** to add once researchers are appointed**

What we will pay in fees

Involve (2016) guidance states that:

"Different organisations will offer you different rates for involvement in research. This is because there is no set guidance on this and some organisations can afford to pay more than others. However, any organisation should be able to tell you how much they can pay you and for what activities".

Further details can be found here: http://www.invo.org.uk/wp-content/uploads/2016/12/INVOLVE_payment_document_v4-NOV16.pdf

The fees offered by the project are constrained by a pre-approved budget. Different fees have been allocated to different activities, dependent upon the depth and extent of the task.

Our categories of fees are as follows:

<p>Level 1</p>	<p>Attendance and involvement at project meetings, with minimal reading or preparation expected in advance.</p> <p>Involvement in other similar tasks or activities requiring limited preparation in advance e.g. participating in a short teleconference as a meeting delegate, or receiving a short document, such as a leaflet or information sheet, to review.</p>	<p>£15 per hour.</p>
<p>Level 2</p>	<p>Attendance and involvement in project meetings as a Chair, with some preparation or organisation expected in advance.</p> <p>Attendance and involvement in project meetings as a meeting delegate, where moderate reading or preparatory work is necessary and requested.</p> <p>Involvement in other similar tasks or activities requiring preparation in advance e.g. Participating in teleconferences or workshops with multiple papers to read in advance.</p>	<p>£15 per hour for meeting attendance, £12.50 per hour for preparation.</p> <p>Preparation fees will be paid up to a maximum of 3 hours preparatory work. Preparation fees paid as Chairs fees will be shared if co-chairs are appointed.</p>
<p>Level 3</p>	<p>Direct participation in research studies or co-production workshops, necessitating active participation in research tasks.</p> <p>Contributing to publications or editing newsletters as a co-author.</p>	<p>£20/hour. The expected time commitment for each activity will be specified in advance.</p>

The project team will provide information on all activities in advance and specify the expected time commitment for each activity, so that you can decide whether you want to contribute or not and prepare.

Scheduled meetings will not go over the planned duration. Project PPI members will not receive less than the agreed amount if a meeting finishes early. We will provide refreshments for meetings. You will not be asked to cover the costs of these.

How fees will be paid

Fees for contributing to project are managed by the University of Manchester.

All payments will be made directly to the individual and they may decline payment if they wish. Each lay member is responsible for any liability with regards to Income Tax or NI contributions.

Fees will be paid after the event or activity directly into a bank or building society.

Payments to an organisation

Arrangements can be made for your fee to be paid to an organisation rather than to you as an individual. This might be your preference, for example, if you work for a small organisation and you are involved with our project during the time that you would normally be working for them. Sometimes, people may want their fee to be paid as a charitable donation. We will not ask you to do this. Public contributors are invited to discuss any requirements for alternative payment arrangements with the project team.

Tax and national insurance

Tax and national insurance will not be deducted by the University of Manchester, but fees paid to you for your involvement with the project are usually subject to normal tax and national insurance procedures. This means you may still be liable to pay tax and national insurance on the fees you have received.

You are required to notify your local HM revenue and Customs office *only* if your annual income exceeds your personal tax allowance. Personal tax allowances are set each year and dependent upon individual circumstances. Public contributors are responsible for checking their own tax liabilities at the end of each financial year (5th April).

Project staff cannot offer you advice on tax or NI issues. If in doubt, you should contact your local HM revenue and customs office.

State benefits

If you are receiving state benefits there may be certain conditions you need to stick to. It is important you are aware of these before agreeing to be paid a fee. If you are in receipt of state benefits and have a set limit for the amount you are allowed to earn each week, the project team will agree a lower fee or agree your involvement on a voluntary basis. We will not reduce any fees unless you ask us to do so.

Further information about state benefits and regulations can be found on the INVOLVE website: http://www.invo.org.uk/wp-content/uploads/2016/12/INVOLVE_payment_document_v4-NOV16.pdf

What to do if there is a problem

If there is a problem, such as a delay in receiving fees or reimbursed expenses, or if the amount you receive is wrong, please contact the project team.

Contact details:

For additional information about the project please contact:

Peter Mellor at peter.mellor@srft.nhs.uk or by telephone on [07753310091](tel:07753310091).

Or otherwise the project Principal Investigator:

Gunn Grande

gunn.grande@manchester.ac.uk

Postal address:

Gunn Grande

Jean McFarlane Building

University of Manchester

Oxford Road

Manchester M13 9PL