

This policy has been developed by Patient and Public Involvement (PPI) leads¹ and PPI contributors².

Oxford Health Biomedical Research Centre (OHBRC) Payment and Expenses Policy for Public



¹ The Oxford PPI Staff Group meets six times a year and includes PPI leads and coordinators from: NIHR organisations in the [Working Together Partnership](#), Oxford Brookes University, Oxford Health NHS Foundation Trust, Oxford University NHS Foundation Trust, University of Oxford Medical Sciences Division.

² Public contributors from one or more of these [PPI groups](#).

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Introduction

Oxford Health Biomedical Research Centre (OHBC) is committed to involving patients, carers, and the public as active partners in their work. This document sets out the OHBC Policy for Expenses Reimbursement and Payment for Time spent undertaking involvement activities.

OHBC is hosted by Oxford Health NHS Foundation Trust. Payments to public contributors will be made through Oxford Health NHSFT for OHBC.

2. Terminology

'Public contributor'³ refers to patients, carers or members of the public who are involved in activities with the OHBC and/or with our partner organisations in the [Working Together Partnership](#).

Involvement activities can range from sitting on governance groups to the design, delivery or evaluation of service change, research, or education. Involvement activities are distinct from participation in research where the individual involved is the subject of the research.

'Named staff member' refers to the person who initiated the involvement work and is the contact person to that particular involvement activity. The named staff member is likely to either be the OHBC PPI coordinator or a researcher.

3. Scope

This policy applies to:

- all public contributors who undertake involvement activities with OHBC. The Working Together Partnership also adopts the principles of this policy⁴.
- children, and young people under 18, who take part in involvement activities. For young people under 16, permission from a parent or guardian should be gained before any activities are undertaken.
- virtual and in-person involvement

This policy does not apply to:

- health and care staff who are asked to provide comment from a professional perspective. Health and care staff may on occasion provide patient or carer lived-experience perspectives (see section 7.1 for detail).

4. Responsibilities of the OHBC named staff member

- The OHBC will provide public contributors with a named staff member who will:
- ensure that there is a record of agreement of what is expected, which expenses will be covered, and if payments for involvement activities are offered, before the involvement begins
- Provide day-to-day support, a 'first point of contact' for any queries
- Send out claims forms after each activity
- Support timely payment of claims.
- Explain to public contributors what information is required to complete claim.

³ Other organisations may use a range of terms such as patient and public voices [PPV], public contributors, service user involvement, lay representatives, lay voices, public voice representatives, patient, and public involvement [PPI] representatives etc

⁴ Each organisations individual policies should be referred to as differences in payment rates and other particulars varies.

- Offer support to public contributors to complete claims, for example filling out forms on behalf of contributors. If filled out by staff, the claim must be signed by the public contributor prior to submission to the appropriate Finance department.
- It is the responsibility of the public contributor, not the OHBRC, to comply with the conditions of benefits. Accepting payment for time may affect entitlement to benefits and this can result in benefits being stopped.

5. Responsibilities of public contributors

Public contributors should read and sign this policy and raise any questions with their named staff member, before undertaking any activities. Public contributors are also responsible for:

- providing receipts, tickets, or other evidence of spending to send in with claims forms
- submitting claims when requested and within two months after the activity (claims for expenses or activities more than three months old will be reviewed for eligibility on a case-by-case basis)
- keeping a record of expenses and activities for their own benefit (public contributors cannot claim for time spent on this administration or the time taken to submit their claim)
- seeking advice in relation to involvement payments:
 - in relation to income tax, National Insurance, and pension contributions (see section 7.3).
 - if in receipt of any form of benefits (see section 7.4 and 7.5)

6. Levels of involvement and categories of payment

The OHBRC identified two levels of involvement: 'Advise & Lead' and 'Inform & Consult'. These levels relate to the intensity of involvement activities and the payments that can be claimed. Examples of these activities are outlined below, recognising nevertheless that at times involvement activities do not fit neatly into these categories:

Advise and Lead – Payment for time spent on involvement activities is provided

- Representation and participation at designated meetings where in-depth commitment is required; for example, public contributors sitting on strategy boards
- Helping to write documents (articles for a newsletter, patient information leaflets, etc)
- Attending, chairing or leading focus groups, workshops, or conferences
- Attendance at consultation events by invitation
- Evaluating and reviewing documents
- Being part of staff recruitment and interview panel membership
- Giving presentations
- Staff training (where the public contributor co-designs and/or delivers the training)
- Supporting and / or mentoring other public contributors

Inform and Consult – Payment and expenses are not provided for the following (these are examples and there may be other activities where payment and expenses are not provided. PPI contributors will be informed if this is the case).

- Attendance at open or public meetings or consultations and giving an individual view, no commitment required
- Attendance at optional training events or webinars, no commitment required
- Responding to short questionnaires

7. Payment for time spent on involvement activities

Involvement activities and their payments and expenses reimbursement must be agreed between the named staff member/organisation and public contributor before involvement begins. The named staff member will provide the PPI contributor with written details of what has been agreed. This will help ensure mutual understanding as to what activities can be claimed for. A record of this agreement should be kept by both the public contributor and the organisation.

Payment/expenses and activities may need to be reviewed if circumstances change e.g. if the needs of the programme change, or the public contributor no longer wants, or feels able, to contribute. Any substantive changes to the programme will be discussed with the PPI contributor and confirmed in writing.

Payments can be declined by the public contributor, or smaller payments claimed.

7.1 Eligibility

Public contributors who do not have a public sector salary are eligible to receive a payment for their involvement. For public contributors who are employed in the public sector, the OHBRC is only able to pay and reimburse expenses for these activities if the work is undertaken during non-contracted hours.

This policy does not apply to staff who are asked to be involved to provide their professional perspective. On occasion, someone employed in health and care may be asked to contribute their lived experience as a patient carer or member of the public. Health and care staff who take part in involvement activities during their normal working hours should have their manager's agreement. In this situation, payment for time spent on involvement activities cannot be claimed. If the involvement activity takes place outside normal working hours and the member of staff is providing a patient or carer perspective, then a claim for time, travel or other expenses can be made.

7.2 Payment rates

All activities, including preparation and follow-up, can be claimed for **at a rate of £25 per hour**.

e.g. if a meeting takes two hours and preparation for the meeting one hour, three hours can be claimed [3 x £25 = £75 total claim].

For some involvement activities, a flat rate, rather than an hourly rate will be offered. It will always be made clear at the outset if this is the case.

7.3 What is reimbursed?

For public contributors involved in [Advise and Lead activities](#), reimbursement is offered for both virtual and in person involvement activities.

Travel and subsistence costs apply to in person activities and need to be agreed in advance by the public contributor and the named staff member. Note that travel time is not reimbursed.

In case of carer costs public contributors are encouraged to discuss with the named staff member if help is needed with childcare or carer costs to enable involvement activities. Requests will be accommodated wherever possible.

For reimbursement rates see Section 8.

NIHR offers £5 per virtual meeting to cover costs of telephone calls, paper, printing ink and paper, internet connection and other home sundries. The OHBRC will endeavour to offer the £5 standing allowance per virtual meeting, in line with NIHR guidelines.

7.4 Tax

Offering payment for our public contributors' time recognises the contribution they make to our work. However, it does not mean they have a contract of employment with the organisation. Income tax and National Insurance liabilities are the responsibility of the public contributor, not the OHBRC.

For more information, please visit [NIHR Public contributor payment policy](#) and [NIHR guidance for members of the public considering involvement in research](#).

Public contributors with questions about tax or National Insurance can contact their local HMRC office [HMRC Helpline 0300 200 3311].

7.5 Public contributors who receive state benefits or have a pension

Public contributors can always accept reimbursement of expenses, but receipt of payment for time is a very complex area if a public contributor is in receipt of state benefits of any kind and/or a state pension.

The OHBRC urges public contributors to seek specialist advice before agreeing to accept payment and also speak to their benefits advisor or Jobcentre Plus, if applicable, to discuss their individual circumstances.

It is the responsibility of the public contributor, not the OHBRC, to comply with the conditions of their benefits. Accepting payment for time may affect entitlement to benefits and this can result in benefits being stopped.

Jobcentre Plus officers may interpret taking part in involvement activities as readiness for work, whether payment is offered or not. To avoid misinterpretations, the OHBRC will provide public contributors with a letter that they can show the Jobcentre, explaining that that service user involvement is about consultation with a person who has personal experience of using health and social care services because of their health condition or other circumstances, and as such cannot be confused with work or capacity for work.

A confidential helpline, provided by *Bedford Citizens Advice* can also help with queries. Contact: contractsadmin@bedfordcab.org.uk or telephone: 01234 330604.

For NIHR-funded research projects, there is a confidential free service, also run by Citizens Advice Bedford. To contact the service please email (preferred): ced@nihr.ac.uk or telephone: 020 8843 7117. Public contributors will need to know which part of the NIHR the involvement activity is with (for example, BRC, CRF, ARC, CRN), and in our case it is OHBRC.

For more information, please visit [NIHR Public contributor payment policy](#) and [NIHR guidance for members of the public considering involvement in research](#).

7.6 Health insurance and sick leave

Public contributors who receive income from medical insurance e.g. on sick leave (either as an individual or through their employer) should be aware that involvement activity, and especially acceptance of involvement payment, may be a breach of terms and conditions. This could put future payments at risk. If there is any doubt about the potential impact of involvement activity on medical insurance arrangements, public contributors are advised to contact their employer and/or insurance provider. The OHBRC will be able to provide a letter explaining the nature of involvement, as outlined above.

8. Payment of expenses

Subsistence costs are for time spent away from home and the costs that need to be met because of this, for example, paying for meals, travel and accommodation.

Public contributors involved in [Advise and Lead activities](#) can claim for the expenses as per the rates listed below.

Expenses that are not listed in this policy can only be claimed with advance, written agreement between the public contributor and the named staff member.

Where a young person or child is involved and it is their parents who have incurred expenses, the parents should make the claim.

Receipts should be supplied. If receipts are difficult to obtain e.g. contactless card payments, copies of bills or bank statements with the relevant section highlighted can be used. Payment of expenses is not taxable.

8.1 Travel expenses

Public transport

The cost of using public transport can be claimed under this policy and receipts must be retained and submitted. Public contributors should secure the cheapest fare that is available. First class travel is not permitted.

Taxis

Taxis fares can only be claimed if agreed in advance with the named staff member, and where there is a justification on the grounds of:

- multiple people travelling to the same place and a taxi results in more cost-effective travel
- personal safety, for example late night travel
- disability, impairment, or long-term condition preventing alternative travel arrangements
- efficiency, for example more than one meeting, in different places, on the same day
- if it is the only feasible means of transport.

Receipts must be submitted with the claim.

Private cars, motorcycles, and bicycles

Public contributors can use their own vehicle when necessary and can claim for miles travelled. Distances to be calculated using Google Maps as a reference. Mileage can be claimed from “home” to “place of meeting”, and the return journey, at the following rates:

Method of transport	Per mile Up to 10,000 business miles in the tax year	Per mile Over 10,000 business miles in the tax year
Cars/vans	45p	25p
Motorcycles	24p	24p
Bicycles	20p	20p
Extra passenger travelling to same meeting	Additional 5p per mile	Additional 5p per mile

Insurance for vehicles is the responsibility of the public contributor when undertaking activities for the OHBRC or partners.

The cost of parking, tolls or congestion charges can be claimed if receipts are submitted. Public contributors are personally responsible for any excess parking penalties, charges or fines issued to them. No payment can be claimed for time taken to travel.

8.2 Caring expenses

In some circumstances public contributors may need to arrange for a carer or support worker to accompany them to a meeting, or to take over their caring responsibilities whilst they are at a meeting.

Claims for reasonable expenses to cover the costs of paying carers or support workers, including travel, accommodation or meal requirements can be made. This should be agreed on a case-by-case basis in advance with the named staff member. Generally, the maximum hourly rate for carers is £20 per hour.

The carer or support worker is engaged by the public contributor and not by OHBRC. We will reimburse actual expenditure based on receipts submitted with expense claims. The receipt should provide details of

the carer’s registration and/or the organisation providing the care. If this is not available (e.g. when the carer is privately employed), the carer’s name, address, email, telephone and NI number should be included on the receipt.

8.3 Meals and accommodation

Meals

For in person events, the OHBRC will endeavour to provide meals and refreshments when appropriate. Our public contributors are able to claim for subsistence, when meal times fall within the journey to/ from our event. The claim allowances are:

Breakfast: if leaving home before 7.00	Up to a maximum of £10.00
Lunch: if at a meeting away from home for more than four hours and covering 12.00 – 14.00	Up to a maximum of £10.00
Evening meal: if at an event away from home after 17.00	Up to a maximum of £25.00

These rates are the maximum which can be claimed. Alcohol, tobacco, and discretionary service charges cannot be claimed. Receipts must be produced with claims.

Accommodation

Meetings are generally organised to avoid the need to stay overnight. However, if the distance that a public contributor is travelling or the time of the meeting means that overnight accommodation is required, this should be agreed in advance between the public contributor and named staff member.

If required, appropriate and safe overnight accommodation should be used, ensuring value for money is achieved. If public contributors require accommodation to join an involvement activity, they should discuss this in advance with their named staff member, who may be able to book accommodation on their behalf. Accommodation costs in Oxford are capped at £100 per night not including breakfast.

Date/ time of arrival and departure will be discussed with public contributors in advance and a refundable booking will be made, in case of last-minute cancellations due to unforeseen circumstances.

9. Claims process

Receiving payment for time is based on three simple steps:

1. Agreement on what is expected and how much public contributors will be paid (based on a rate of £25/h - see section 7.2);
2. Agreement of which expenses will be covered and whether some of these will be made in advance by us (e.g., train tickets and accommodation);
3. Filling in a form that will be provided to public contributors by their named staff member after each activity, signing and returning it to them, with original receipts for expenses if there are any.

Once public contributors have submitted their form, their named staff person will check the form and get it approved by the relevant line manager and will then submit to the appropriate Finance department, depending on where the money is held for the project that the public contributor will be paid from.

Public contributors' personal details will be seen by the staff members involved with claims, as well as budget holders, and financial administrators. All forms will be held securely on either University or Trust servers. Public contributors' details will not be used for any other purpose than to make payment, and a new form will need to be completed each time a public contributor makes a claim.

10. Who to contact

Different pieces of involvement work will be initiated by, and paid from, different people/ departments. The contact person in each case may be different and should always be given. In this document, this person has been referred to as the named staff member. If there is not a named contact given, public contributors should check with the person who approached them in the first place.

General queries about this policy can be addressed to the PPIEP Manager at the OHBRC or PPIEP inbox PPI.OHBRC@oxfordhealth.nhs.uk (Cora Reilly-McGowan- starting in her role 13 November 2023, email address to be advised).

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ⁱ The Oxford PPI Staff Group meets six times a year and includes PPI leads and coordinators from the following organisations: Medical Sciences Division, NIHR Applied Research Collaboration (ARC) Oxford and Thames Valley, NIHR Clinical Research Network (CRN) Thames Valley and South Midlands, Oxford Biomedical Research Centre, Oxford Health Biomedical Research Centre.