**Guidance for PI co-researchers about payment**

This document provides guidance for co-researchers about payment for their time. Organisations could use it to develop policies about payment for PI contributions.

**Important things for you to know**

1. [Add name of host organisation] values the input of all public involvement contributors to research. You should not be out of pocket by being actively involved in research. This means we will cover your expenses and offer payment for taking part.
2. [Add name of host organisation] should not ask you to be involved in a research project without discussing this policy with you. You do not need to say yes if you do not want to take part.
3. Receiving payment of a fee for involvement may have implications if you are on state benefits, unemployed or employed. This is because all payments will be treated as earnings.
4. [Add name of host organisation] will provide you with clear guidelines about the nature of your involvement, what amount we will pay you and what expenses we will cover - see below.
5. If you are receiving benefits, you must seek advice from a benefits advisor or from Jobcentre Plus about your personal circumstances.
6. Reimbursed expenses can, in some circumstances, be viewed as benefits. Again, it is important to take advice before agreeing to undertake any project work.
7. Receiving payments may also have implications for you if you are liable for income tax or national insurance, receiving a pension, pension credits or tax credits.
8. You can choose whether or not to accept payment for involvement in research, or whether to accept a lower amount so this does not affect your benefits. Taking expert advice is important. Other rewards might be available in lieu of payment, such as training, trips or visits, or meeting with other people.
9. If you are claiming benefits there is a maximum number of hours you may volunteer weekly. Please check with your benefits officer or Jobcentre Plus for more information

**Important questions to ask the research team**

1. What is the host organisation’s payments policy, and can you have a copy?

Check whether the payment policy is in line with the guidance from INVOLVE: <https://www.invo.org.uk/wp-content/uploads/2016/05/CCF_Public_Payment_Guide-1.pdf>

This would mean that they would cover where appropriate:

* All travel costs by public transport or car (mileage allowance)
* Overnight accommodation and subsistence (i.e., food and drink)
* Childcare or replacement carer costs
* Costs of a Personal Assistant or Support Worker
* Conference fees
* Administration costs, e.g., use of ‘phone, postage, stationery and other equipment
* Training
* A fee for your involvement.

1. How much does the organisation offer for involvement activities?

The INVOLVE recommendation is:

<https://www.invo.org.uk/wp-content/uploads/2016/05/CCF_Public_Payment_Guide-1.pdf>

Not all projects are funded to the same level. This means the fee may vary depending on the project. Not all roles need the same contribution. This means the fee may vary, depending on the complexity of involvement.

1. How much time will you be expected to give? (week, month, year)

Involvement varies by project. This will be discussed with you at the time.

1. Will the organisation pay for expenses and what will they cover?

See section 1 above. Depending on your role, the organisation may pay for you to attend meetings, prepare for meetings, attend training events, interview others, analyse data, review documents or present your findings. This may be on a one off basis, on an hourly rate or a day rate.

1. What expenses will the organisation cover directly or in advance?

The organisation may purchase in advance train tickets and pay for accommodation. They may also pay costs directly to a personal assistant or a replacement personal assistant/carer when agreed with you.

1. How do you claim back expenses you pay out yourself?

It is important that you keep your receipts for any expenses (e.g., travel tickets) as the organisation will require these to reimburse you. All claims for expenses need to go through the organisation’s finance procedure. The organisation may reimburse your expenses by making payments into your bank account. This can take a few days to a few weeks. If needed, the research team may be able to give you a float to cover initial costs until your payments start to come through (e.g., to cover tram or bus fares).

1. If a fee is offered, how do you claim this?

Depending what role you are undertaking, you will be asked to either complete a timesheet, submit an invoice or send your contact an email about the time you have spent working on the project. If your fee is for attending meetings, the person responsible will sort this with you each day that you are involved.

1. Who in the organisation is responsible for dealing with payments and expenses on your behalf? And how do you contact them?

Your contact is:

Their email is:

Their phone number is:

They are based at: