

Costing PPI

Top tips

1. List out *all* of the PPI and engagement activities you plan for the whole life cycle of the project – ideally in a separate document where you are not constrained by word limits/formatting etc
2. For each activity, create a costing line based on # of events, # of people, #number of hours and #number of years (of project)
3. Consider inclusivity – are there accessibility needs or supports required to support people to be involved? Budget for them!
4. Don't forget dissemination and/or public engagement events – consider location hire, transport reimbursement, refreshments, accessibility
5. Be ready to signpost your [contributors to advice](#) on accepting payments
6. Know where your final costed figure comes from – many researchers guess at £1000 - £5000, but the final total is less important than being able to articulate what it will be used for and how it links to your PPI plans

Check (and double check) that your budget and costings match with and are clearly linked to your proposed PPI plans

What should I cost for PPI?

- Costs for reimbursement of public contributors – consider potential travel, parking, sustenance, digital and printing costs
- Honoraria/payments
- Costs for venue hire and refreshments/consumables for PPI-related activity
- Costs to support accessibility – consider the needs of public contributors who may need the support of translators, large print, carers or childcare and/or additional facilities to support their attendance
- Contributor training/conference/dissemination costs
- Payment via community groups or third party
- FTE to support PPI-related activity and/or payment of PPI Lead and/or public co-applicants

Reimbursement

The rule of thumb is that no-one should ever be out of pocket as a result of getting involved in our research. Where possible, you should cost your reimbursements to reflect the actual cost of the activity (eg parking rates at the venue(s) you will likely use, transport over the maximum likely distance etc). For other costs which are harder to predict, using the same reimbursement schedule as employees at your institution is generally acceptable. You can find more guidance on reimbursement in our [researcher guidance](#).

Costing PPI activities

[NIHR Guidance](#) suggests a rate of ~£25 per person per hour of activity, and it is generally acceptable to cost on this basis for most mainstream PPI activities. We generally suggest using the phrasing 'we have allowed for up to...' and then cost in a reasonable upper end figure for the number of people, hours and occurrences. Make sure you have costed each activity, or that you have an explanation for how/why an activity will not need costing.

For example '*We have allowed for honoraria for up to 6 focus groups over the course of the project, with up to 8 participants each, for an estimated time of 90 minutes. $6 \times 8 \times 1.5 \times £25 = £1800$* '.

Focus Groups

Most focus groups have between 5 – 10 participants and run for 60 – 90 minutes. Generally, focus groups are single activities, though you may choose to hold separate focus groups for different audiences, stakeholders or in different locations.

Individual meetings/interviews

Individual meetings can be an accessible and inclusive way of involving people, and can be costed similarly to focus groups. Though they will vary from person to person, individual discussions typically last 30 – 60 minutes.

PPI groups or committee memberships

Even if your PPI group or committee does not meet to a regular schedule or for a specified amount of time, you will need to cost according to a loose schedule to ensure you have sufficient funds to cover honoraria. There really is no benchmark or 'normal' number of meetings as it will depend on what you want the group or committee to do – however, as a rough guide between 3 and 6 meetings a year would be typical (and many groups will meet more frequently). '*We have allowed for up to...*' phrasing works well for this scenario.

If you have a public contributor chairing or in meetings/activities that require preparation, then it is typical to consider this in your costings as a higher hourly rate and/or additional hour(s).

Surveys

Many research groups successfully use surveys as a cost-free way of involving a large number of people. However, having an honorarium for completion of a survey can

significantly increase the number and diversity of responses if you have the funds to do so. The amount you offer should vary depending on the amount of time required to fully contribute to the survey. Typical amounts for a survey taking between 10 and 25 minutes would be £5 - £15. Vouchers are often convenient for this purpose*.

Workshops/stakeholder meetings

These would typically be ½ - fully day activities, which NIHR suggests costing at £75 - £150 per person (for half or full days respectively, assuming little preparation is necessary). The typical number of public contributors expected at such events will vary from 4 – 5 as part of a multi-role stakeholder meeting to 25 or more as part of a workshop.

Reviewing documents

Costing for review of documents can be challenging as documents, and the time taken to review them, vary widely depending on the nature of the document itself. NIHR Guidance suggests around £50 for reviewing up 50 pages of material (this is usually in the context of lay review for funding applications). Many researchers choose to incorporate this activity into meetings (or preparation for meetings) on a set hourly basis – for example, offering £50 for attendance at a two hour meeting + £12.50 for pre-reading the documents (estimated to take half hour).

Costing to support accessibility

A greater diversity of people can be involved in research when we make it truly accessible to their needs. Including costs to support accessibility in your PPI not only makes this possible, but is a way for you to clearly demonstrate your commitment to diversity in your PPI.

Required support will vary according to individual or community needs, but can include things such as:

- translation of documents or support from a translator
- closed captioning
- transcript generation
- large print
- hiring of accessible locations
- transport
- carers or childcare
- additional quiet spaces
- facilitators

Training/conference attendance

Many research applications specifically ask about training for public contributors, and many public contributors benefit from and/or request access to training to support their involvement. The NIHR Cambridge BRC PPI team can provide bespoke training for your

public contributors – if you would like to access this training, please cost it into your applications at £200.00.

If you would like to co-present your work at an appropriate conference with your PPI member(s), then you will need to include costs to cover their attendance.

Community Groups/Third-party payments

For groups or communities where individual payments are challenging or impossible (for example due to not having a bank account or having complicated benefits reporting requirements, among other reasons), it is sometimes possible to pay a community group or organisation who provide services to your contributor. It is also appropriate to do this where you have worked with a community leader or organisation as part of your involvement.

PPI Roles

Adequately resourcing your PPI strategy includes the provision of appropriate FTE – you will either need to plan and deliver your PPI plans yourself, or ensure that someone within your team is able to do so. Good PPI is time and admin intensive, both to plan/organise/deliver and write up all PPI activities, and to follow-up and ensure a positive experience for your public contributors. The required FTE will vary depending on the nature of your PPI plans, the scope of the research the role will cover (eg a single project vs supporting a whole department) and the level of responsibility you intend to delegate. Some rough costings for possible roles at different levels are outlined below – note there will be an additional ‘overhead’ cost depending on the source of your funding (between 40 – 70%). Always confirm estimates with the relevant finance team!

PPI Coordinator (Band 5 NHS) – Salary £24907/Gross £32407 annual

Responsible for administration and organisation of PPI plans, directed by someone else (likely the study PI)

- Draft PPI invites/advertisements and disseminate to defined list
- Oversee correspondence to/from public contributors, raising issues/questions to the PI
- Collate and return feedback to public contributors
- Arrange required reimbursements for PPI members
- Organise meetings/minutes and administration
- May facilitate/participate in PPI activities but would likely need support of the PI to answer questions etc on the nature of the project

Similar/combinable roles within research team – project administrator, Band 5 research nurse, clinical trial coordinator

PPI Project Manager (Band 6 NHS) – Salary £31364/Gross £41124

Responsible for management of PPI elements of pre-defined PPI plan (PPI plans created by someone else)

- Draft PPI invites/advertisements and disseminate taking some responsibility for identifying contacts

- Oversee correspondence to/from public contributors, raising some issues/questions to the PI and independently sorting others
- Collate, organise, and return feedback to public contributors
- Arrange required reimbursements for PPI members
- Organise meetings/minutes and administration
- Facilitate/participate and suggest PPI activities and actions but would likely need support of the PI to answer questions etc on the nature of the project

Similar/combinable roles within research team – project manager, Band 6 research nurse, clinical trial project manager

PPI Manager/PPI project Lead (Band 7 NHS) – Salary £31364/Gross £41124

Responsible for management and development of PPI plans in coordination with research team

- Draft PPI invites/advertisements and disseminate taking responsibility for identifying and maintaining contacts
- Oversee correspondence to/from public contributors, independently sorting issues and questions in liaison with the PI
- Draft, collate, organise, and return feedback to public contributors
- Arrange required reimbursements for PPI members
- Organise meetings/minutes and administration
- Facilitate/participate and suggest PPI activities and actions, liaising with PI as appropriate

Similar/combinable roles within research team – senior project manager, Band 7 research nurse, senior clinical trial project manager

How should I pay people?

The mechanism(s) by which you are able to pay your contributors will often be set by your department and/or organisation. Subject to those constraints, best practice is to offer people different options for payment (bank transfer, cheque or voucher), and to process them as close as possible to the activity they relate to. For some public contributors (particularly those on benefits), the ability to control when they access the funds (eg being able to bank their own cheque) is important to be able to manage their reporting requirements and maximum allowable earnings in their earnings period.

*Vouchers are often a convenient and pragmatic way to pay people, but it is important to note that HMRC and DWP view vouchers the same way as direct cash payments, so they cannot be used to circumvent issues with benefits or taxation.