

Improvement Academy
PPI reimbursement form: insert name of project

DETAILS

Title:	Dr/Mr/Mrs/Miss/Ms
First Name:	
Surname:	
Home address:	
Bank Name and Address:	
Sort Code:	
Account number:	

Travel Expenses

Date of journey	Method of travel E.g. car, train	Journey		Mileage (0.45/mile)	Single/return	Amount claimed
		From	To			
					TOTAL	£

(Please attach receipts, used train, bus, parking tickets as evidence of journey)

Meeting Attendance – compensation for time (£10 / hour or other agreed amount)

Meeting name	Date	Amount
Claimant completes this section with help of project lead each time they attend an activity		
		TOTAL £

I declare that the information given on this claim form is true and correct to the best of my knowledge. I understand that action may be taken against me if I make an incorrect claim. I consent to the disclosure of relevant information on this form for the purposes of fraud prevention, detection and investigation. I also confirm that by claiming car mileage I hold a valid driving licence, that the car has a current MOT certificate and is fully insured.

Name:	Signature:
Date:	

Trust Authorising Officer I confirm that this claim complies with the Expenses Guide and that the claimant has provided the necessary receipts to evidence this claim.

Name:	Signature:
Date:	
Cost code: insert appropriate code	
Research Manager Authorisation	
Finance Manager:	Signature:
Date:	

Please return to: Shahima Begum, Admin Assistant, Improvement Academy, Yorkshire & Humber AHSN | Bradford Institute for Health Research, Temple Bank House, Bradford Royal Infirmary, Duckworth Lane, Bradford, BD9 6RJ.
shahima.begum@yhahsn.nhs.uk



Patient & Public Involvement (PPI) in improving quality & safety in health care



Budgeting & Reimbursement **Guidance & Policy for** **Improvement Academy staff**

How to budget for PPI in project proposals

Bids for funding of research and improvement projects should include adequate provision for PPI. The following recommendations have been summarised from up-to-date INVOLVE guidelines from www.invo.org.uk, specifically the publication '*Budgeting for Involvement*'.

How much should people be paid?

It is good practice to provide compensation for people's time, all travel and subsistence expenses, and other expenses required to enable someone to take part. Exact amounts are not prescribed, and depend on levels of skills, experience and expertise; commitment required; responsibility.

Compensation for time - recommended rates (approximate):

Daily Committee Fee including preparation, attendance & commitment: *£150* (less if the meeting is shorter)

Meeting/workshop/focus group attendance where little preparation is required and no responsibility beyond the session: *£10 per hour*.

Carrying out research & dissemination activities (e.g. conducting interviews, presentations): *£15 per hour*.

Other ways of paying for contributions:

- Fee or donation or gift to a group
- Funding for training & learning

Other potential costs in addition to travel & expenses:

Depending on the people you are aiming to involve, you may need to factor in: Childcare costs £50-£60 / day; Carer costs up to £40/hour ; Dementia/ Neurodegenerative disease replacement carers £200/day; Personal assistants e.g. for people who are disabled up to £40/hour; Overnight accommodation £75/night (£125/night in London).

An online cost calculator is provided by INVOLVE to help develop a PPI budget for bids. www.invo.org.uk/resource-centre/payment-and-recognition-for-public-involvement/involvement-cost-calculator/

Ratified reimbursement policy: Improvement Academy

Once funding for PPI is available in a project, Improvement Academy staff should use these recommended rates to compensate people for their time, allocating these payments to the appropriate cost code. Most activities will fall into the category of '**Meeting/workshop/focus group attendance**' at **£10/hour**. If significant preparation and commitment is required, this amount should be increased accordingly.

Travel should be reimbursed as follows:

Car – 45p/mile.

All train, bus, taxi fares and parking if tickets/receipts are kept.

Compensation for time, and travel payments, are reimbursed to those involved using an Improvement Academy Reimbursement Form (overleaf). Alternatively, to prevent people being 'out-of-pocket', train and taxi fares can be purchased directly by the IA in advance and this is encouraged.

Attendance at conferences / seminars / training:

There is no hourly rate provided for attending personal development events but all expenses should be paid. In addition, a subsistence rate of £25 can be claimed for every 24 hours.

Reimbursement process:

Reimbursement forms are available for all staff to use with patients and the public. A copy is provided overleaf which highlights in red the information to be completed by the project lead before the form is used. If staff do not have a budget code to allocate their activities to (perhaps it is a speculative activity before a project), a general IA budget can be used with agreement. To obtain forms for your project, and agree cost codes and payment amounts, contact **Claire Marsh** or **Beverley Slater**.

Important: all those who get involved need to be made aware of potential impacts on tax and benefits but it is their responsibility to check these. Please refer people to the INVOLVE guidance: '*WhatYouNeedToKnowAboutPayment*' and ensure they are happy with any implications BEFORE the involvement activity starts.