

POLICY ON RECOGNITION PAYMENT FOR PUBLIC CONTRIBUTORS IN THE COLLEGE OF MEDICINE AND HEALTH

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INTRODUCTION

The College of Medical and Health at the University of Birmingham is committed to working in partnership with patients, service users and public contributors to influence what health and social care research we do.

This policy sets out how the College of Medical and Health at the University of Birmingham supports members of the public to be involved in research activities through reimbursing expenses and, where appropriate, offering payments (honoraria) to recognise their contributions.

WHY RECOGNITION PAYMENTS ARE IMPORTANT

Reimbursing expenses and offering honoraria payments is one way of rewarding contributors for their contributions (time, skills and expertise) in contributing to the research process. Offering a payment to

contributors helps support more equal partnerships between researchers and members of the public. It also helps to ensure that opportunities to be involved in our research are equally accessible to people from diverse backgrounds.

We strongly advise you to get expert advice about your own personal financial circumstances before accepting payment (honoraria) for involvement in research.

KEY TERMS

Throughout this document, we use the following terms:

PUBLIC

The University of Birmingham uses the National Institute of Health Research (NIHR) definition of ‘public’:¹

“When using the term ‘public’ we include patients, potential patients, carers, family members and people who use health and social care services, as well as people from community organisations or voluntary groups that represent people who use services. Also included are people with lived experience of one or more health conditions, whether they’re current patients or not.”

INVOLVEMENT

The University of Birmingham uses the National Institute of Health Research (NIHR) definition of ‘involvement’²

“Involvement’ in research is research being carried out ‘with’ or ‘by’ members of the public rather than ‘to’, ‘about’ or for them. It is an active partnership between patients, carers and members of the public with researchers that influences and shapes research.”

HONORARIA

Honoraria are payments given to individuals as a token of appreciation for services provided, typically on a voluntary basis, where a formal fee is not legally required.

PRINCIPLES OF RECOGNITION PAYMENT FOR PUBLIC CONTRIBUTORS

Expenses Covered: As a guiding principle, you should not be out-of-pocket because of active involvement in research activities in the College of Medical and Health at the University of Birmingham. We will reimburse all reasonable expenses associated with your involvement such as the costs of travelling to a meeting or the cost of a carer who is providing cover for you.

Named Contact: You will have a dedicated person for public involvement you can contact if you have any questions relating to any aspect of your involvement in research. They will make sure you are given a copy of

¹ https://www.nihr.ac.uk/documents/briefing-notes-for-researchers-public-involvement-in-nhs-health-and-social-care-research/27371#Definitions_of_involvement,_engagement_and_participation

² https://www.nihr.ac.uk/documents/briefing-notes-for-researchers-public-involvement-in-nhs-health-and-social-care-research/27371#Definitions_of_involvement,_engagement_and_participation

this policy and will also be able to answer questions you might have about payment of expenses/honoraria or signpost you to other support.

Honoraria: You may be offered a payment, sometimes called an honorarium/honoraria, for tasks such as reviewing documents or attending a meeting. The purpose of offering honoraria is to recognise your contribution to research projects. The payments do not mean that you have a contract of employment with the University of Birmingham. It is important to note that Involvement is distinct from employment and acceptance of honoraria payment is up to you.

Tax Implications: If you choose to accept payments for involvement in research, this is likely to have implications if you are currently employed, unemployed, receiving state benefits or retired – this is because the payment will be treated as earnings. It is your responsibility to get expert advice regarding your personal financial circumstances before accepting payment for involvement in research. Further information about accepting payments for involvement and support available to you is provided on P.9 of this policy. You can choose whether or not to accept payment for your involvement activities or whether you would prefer to accept a lower rate. It is important that you discuss your preferences for payment with your named contact before starting an activity.

Data Storage: Your personal details will be seen by the staff members involved with your claim, as well as budget holders, and financial administrators. Your forms will be held securely on University of Birmingham servers. Your details will not be used for any other purpose than to pay you, and you will need to complete a new form each time you make a claim.

Activity Information: Before you decide to be involved in an activity, you will receive clear written information about the nature of the involvement, the duration and frequency of involvement, the amount of payment being offered, payment options available and what expenses will be covered. You should get in touch with your named contact if you have any questions relating to the activity.

COVERING EXPENSES

When we talk about ‘covering expenses’, we mean making sure that you are not out-of-pocket for your involvement activities.

We can pay directly for your expenses (e.g. buying your train ticket and sending to you in advance) or we can reimburse (pay you back) for expenses that you have already paid for.

This policy aligns to the [University of Birmingham Expenses Policy](#) (Revised November 2024). In this section, we outline the kinds of expenses the University of Birmingham will cover and the limits set on what you can claim. When expenses are required, please try to get the best value for money possible.

When claiming expenses, you will need to provide original receipts showing proof of payment and you will need to complete and return a form to us.

If you are not sure if expenses will be covered by the University of Birmingham or what the limits are, it is important that you ask your named contact for public involvement before spending any money.

If there are other barriers to your involvement that are not included in the list provided below, please discuss your specific needs with your dedicated contact for public involvement. Reasonable adjustments will be considered on a case-by-case basis.

The University of Birmingham has the right not to honour expenses if they are considered to be unreasonable. If you are in doubt about expenses, it's always best to check first!

TRAVEL EXPENSES

The University of Birmingham will cover expenses for travel costs associated with public involvement in research activities.

If you are making the travel arrangements yourself, we ask you to identify and use the most cost-effective mode of transport possible.

Travelling using public transport

If the University of Birmingham is buying your travel tickets in advance for you, please let us know if you have a Network Rail Card, a Disabled Person's Railcard, a Young Person's Railcard or a Senior Citizen's Railcard so we can apply the discount to your ticket.

If you are making your own arrangements for using public transport, we expect you to travel at economy or standard class. Booking tickets in advance or using railcards for discounted travel can produce further savings. The University of Birmingham will not be able to reimburse first-class travel.

Making your own way to a venue

If you drive to a meeting, you may claim reimbursement at the following mileage rates:

- Car (up to 10,000 miles): 45 pence per mile
- Car (over 10,000 miles): 25 pence per mile
- Motorcycle (all engine sizes): 24 pence per mile
- Bicycle: 20 pence per mile

You will need to state the mileage on your claim form. The mileage you report must match the distance between the start and end point reported. If you incur parking fees these may also be claimed, by submitting receipts. Parking fines will not be reimbursed.

Taxis

You may use taxis if no alternative public transport is available or if due to your disability or ill-health, public transport would not be feasible. You must provide receipts for any taxi journeys.

ACCOMMODATION COSTS

Occasionally, you may need to stay in accommodation overnight. This may be in situations where you would otherwise have to make an unreasonably early start to get to a meeting/event or, if you do not live locally, you may need accommodation during a meeting/event that lasts more than one day.

In most circumstances, the University of Birmingham will make accommodation bookings on your behalf. You will normally be booked into accommodation convenient for the meeting on a bed and breakfast basis or, if appropriate, dinner, bed and breakfast.

It is important that you discuss any specific accommodation requirements with your public involvement lead in advance of the activity.

SUBSISTENCE (FOOD AND DRINK)

If you attend a meeting relating to public involvement, refreshments are normally provided. It is important that you let the person organising the meeting know about any special dietary requirements in advance so that specific needs can be catered for.

If you are involved in a research activity that is not organised by the University of Birmingham and where refreshments are not provided, you will be reimbursed for the exact cost of food and non-alcoholic drinks when receipts are provided. There is a recommended allowance of up to £25.00 for dinner and £7.00 for breakfast if it is not included in the accommodation rate. It is important that you discuss the daily allowances with your public involvement lead.

The University of Birmingham will not pay for the costs of alcoholic beverages.

REMOTE WORKING COSTS

Many meetings now take place on virtual platforms, such as Zoom or Microsoft Teams. In most cases there are options to join the meeting over the internet or to telephone into the meeting. If you are involved in a virtual meeting, some research projects may offer a small contribution towards the cost of telephone calls, stationery, printing ink and paper, internet connection and other items, such as refreshments. This is at the discretion of each individual project and you will be notified if this is offered before the activity.

If you are dialling into a meeting by telephone, we will send you a number to call that charges local rates. If you are not sure what number to dial from the options available, please contact your named public involvement contact.

Printing Costs

If you require hard copies of documents related to the activity you are involved in, we can, in most circumstances, arrange to post these out to you. If you wish to print documents from home and would like to be reimbursed you must discuss this with your named public involvement contact.

Postage

If you need to send documents to the University of Birmingham, you can claim the postage. It is important, however, that you send us original receipts as proof of purchase of postage.

LEARNING AND DEVELOPMENT

Occasionally we may ask you to attend an event because it might be beneficial for you in your role as a public contributor or recognise your contribution. We will clarify in advance if we offer an honorarium for your attendance and cover any associated costs.

If you are requested by the University of Birmingham to attend a learning event, such as a conference, we will pay any event fees and associated expenses.

CARER COSTS

It is important that you speak to your named public involvement contact if you think you might need help with caring responsibilities. For example, alternative childcare or if you need a carer to come with you to meetings or to provide respite care at home.

Carers in attendance - If you are attending a meeting or an event as part of your involvement activities and you need to be accompanied by a paid or unpaid carer, a personal assistant, or a support worker the travel, accommodation and subsistence costs of this person will be met by the University of Birmingham. Receipts must be provided for both you and your carer. It is important that you discuss your requirements with your named public involvement contact in advance.

Carer cover - If you are attending a meeting or an event as part of your involvement activities and you need to get carer cover for a person you normally care for, over and above the hours that you usually pay for, you may claim a reasonable hourly rate for the time that you need the additional cover. This includes care for children. However, you must discuss and agree this your public involvement lead in advance.

CLAIMING EXPENSES

After each activity, your named public involvement contact will send you the correct form to complete. It is your responsibility to complete and return the form to us with any original receipts.

You must claim expenses within three months of the involvement activity. Anything claimed outside of this time frame may not be paid.

When we have received the form, we will send this to our finance team for processing. It may take several weeks to reimburse expenses. Payments will be paid into your bank account and will appear as 'University of Birmingham'. The expenses are currently paid as a combined value of honoraria and expense reimbursement, if you would like these paid separately for tax purposes please let your named public involvement contact know in advance.

It is your responsibility to check your account and notify us as soon as possible if you are not sure if a payment has been made.

PAYMENT OF HONORARIA FOR INVOLVEMENT

When we talk about payment of honoraria for involvement, we mean payment for your time, skills and expertise.

Offering payment for your time recognises your contribution to health and social care research projects at the University of Birmingham. It does not mean that you have a contract of employment with the University of Birmingham.

The rates listed below are suggested rates and are based on rates offered by organisations that also involve public contributors, such as other universities and the National Institute of Health Research. Before you decide to be involved in a task, you will receive clear written information about the nature of the involvement, the duration and frequency of involvement and the amount of payment being offered.

If you choose to accept payment of a fee for involvement in research, this is likely to have implications if you are currently employed, unemployed, receiving state benefits or retired – this is because the payment will be treated as earnings. It is your responsibility to get expert advice regarding your personal financial circumstances before accepting payment for involvement in research.

You can choose whether or not to accept payment for your involvement activities or whether you would prefer to accept a lower rate. It is important that you discuss your preferences for payment with your dedicated Public Involvement contact before starting an activity.

Not all public involvement activities will offer an honoraria and rates of honoraria offered are at the discretion of each individual project. You will be advised in advance of honoraria offered for each activity and it is your choice whether or not to be involved.

RATES OF PAYMENT

As a public contributor, you may be involved in a range of tasks. This may include being part of a discussion with a researcher, reviewing documents online, co-delivering training, or an activity that takes place over a longer-term, such as providing ongoing contributions to a research project.

Honoraria you are offered will depend on the amount and nature of the particular activity.

If you have any queries at any stage about the activity you are involved in or how much you will be paid, it is important that you discuss these with your Public Involvement Lead.

Rate	Suggested Time	Example of activity
£10.00 - £15.00	½ hour	Reading and commenting on a short abstract or document (less than 1 page of A4)
£20.00 - £25.00	1 hour	Involvement in an activity lasting approximately one hour which requires little or no preparation. This might include attending a discussion group to provide feedback on a project proposal.
£40.00 - £50.00	2 hours	Involvement in a task or activity that requires some preparation. This equates to approximately 2 hours of activity.
£75.00	½ day	Involvement in a larger task or activity that requires preparation. This equates to approximately ½ day.
£150.00	Full day	Involvement in a full day activity, such as attending an event or workshop.

CLAIMING HONORARIA

After each activity, your named public involvement contact will advise you on how you can claim honoraria for your involvement. They will send you the correct form to complete or, if appropriate, advise on how you can claim honoraria in other ways (e.g. through vouchers).

It is your responsibility to follow the instructions for payment and return any documents to us.

You must claim honoraria within three months of the involvement activity. Anything claimed outside of this time frame may not be paid.

When we have received the form, we will send this to our finance team for processing. It may take several weeks to reimburse honoraria. Payments will be paid into your bank account and will appear as 'University of Birmingham'.

TAX AND NATIONAL INSURANCE

You are responsible for related pension contributions, National Insurance and income tax on any payments (honoraria) received for your time. You will need to declare National Insurance and income tax to [HMRC](#). The University of Birmingham does not deduct tax or National Insurance contributions from payments.

The University of Birmingham is not able to offer finance advice, but can support you in the process of getting advice.

PUBLIC CONTRIBUTORS WHO RECEIVE STATE BENEFITS

If you are receiving state benefits or have a state pension, any payment of fees and expenses to you may affect your benefit claim. You should notify Jobcentre Plus of any paid or voluntary activity. You may also need permission to undertake any paid activity. Benefit conditions are complex and limits on payments that can be received without benefits vary widely.

If you are considering involvement or are already involved in a project funded by the National Institute of Health Research, more information is provided by NIHR nationally through the [Centre for Engagement and Dissemination](#).

FURTHER INFORMATION

If you have any questions or require further information about claiming payments and expenses, please contact the named public involvement lead for your research project.

JARGON BUSTER

BACS	Bankers' Automated Clearing Service. A scheme in the United Kingdom for electronic bank transfer. BACS payments take 3 days to clear.
Honorarium/Honoraria	Honoraria payments are small amounts of money paid to someone for services (in this case contributing to research) where there is no official charge.
Expenses	Reasonable travel or food expenses incurred as a result of involvement will be reimbursed where receipts are submitted.
Involvement	Involvement refers to an active partnership between members of the public and researchers in the research process. Involvement is research done with or by members of the public rather than to, about or for them.
HMRC	HM Revenue and Customs
NIHR	National Institute for Health Research
Public	Public refers to patients, potential patients, carers, family members and people who use health and social care services, as well as people from community organisations or voluntary groups that represent people who use services
Reimbursement	Money paid back to you that you have already paid out.
Subsistence	This is a term used for day-to-day needs, such as food and drink.

FURTHER RESOURCES

HM REVENUE AND CUSTOMS

HM Revenue and Customs HM Revenue & Customs: Home Page <http://www.hmrc.gov.uk/>

HM Revenue and Customs information about the need to complete a tax return is available from: www.hmrc.gov.uk/sa/need-tax-return.htm

HM Revenue and Customs circular EIM71105 is available through the search facility. www.hmrc.gov.uk Type in EIM71105.

DEPARTMENT OF WORK AND PENSIONS

Department for Work and Pensions guidance on once-off payments is set out in their booklet "Doing the Right Thing" that is available on their website through the search facility <http://www.dwp.gov.uk/>

GOV.UK

The Gov.uk website has all sorts of easy to use information on just about anything that concerns government and statutory services, including information about personal income tax allowances) and state benefits. See www.direct.gov.uk

NATIONAL INSTITUTE FOR HEALTH RESEARCH RESOURCES

NIHR Guidance on Payment for Public Contributors:

NIHR Guidance for Researchers:

NIHR Glossary: <https://www.nihr.ac.uk/glossary>

OTHER RESOURCES

Job Centre Plus - DWP - Volunteering <http://www.dwp.gov.uk/docs/dwp1023.pdf>

Citizen's Advice Bureau - Citizens Advice Bureau: Home Page: <http://www.citizensadvice.org.uk/>