

# Checklist for involving members of the public in research

*Adapted from original by Laura Lamming, VBI Programme, Primary Care Unit, Cambridge*

## 1. Writing your application

### 1.1 Payment and expenses. See also 4. Payment

- Are you going to pay for involvement and/or reimburse expenses?
- What is an appropriate amount for the tasks?
- Will they require training, travel to conferences, incidental expenses?
- Use the INVOLVE cost calculator  
[www.invo.org.uk/resource-centre/involvement-cost-calculator](http://www.invo.org.uk/resource-centre/involvement-cost-calculator)

## 2. Recruitment

### 2.1 Who to recruit

- Who is representative of the people you are targeting with your study?
- Is it appropriate to recruit experienced PPI representatives or people who have never been involved in research before?
- Do they or you require any special skills or knowledge? Do they or you have any geographical, IT or ability limitations?
- How many PPI representatives do you want and can afford?
- Have you got a wide enough variety of people?
- How will you deal with PPI dropout during the study

### 2.2 How to recruit

- What are the appropriate methods used for PPI recruitment? e.g. PPI websites, known contacts within CEDAR and partners, other online and physical forums
- What details of the study are needed in the advert and person specification?
- What additional information is required for those expressing an interest?
- What will you do if you have too few or too many respondents? Can you keep the data for future use?
- What will you do if someone inappropriate for the study expresses an interest in contributing?

## 3. Data Security

### 3.1 Data storage (Contact the appropriate member of the Data Management Team to discuss)

- What information will you be receiving from PPI representatives?
- What data is required for payment, reimbursement, provision of travel documents etc?
- What level of data security is required? Will it need anonymisation for storage?
- Who will have access to this data?
- Do you need consent to hold and/or distribute this data?
- How long will/can you hold this data?
- Can a PPI representative participate without providing personal data?
- What information do you need to provide PPI representatives with about data storage?
- When and how will data be destroyed? Will data require anonymisation for destruction?
- Can PPI representatives ask for data to be destroyed at any point?

#### **4. Payment.** Contact the Finance team if necessary

##### **4.1 Payment amounts**

- Use the INVOLVE cost calculator  
[www.invo.org.uk/resource-centre/involvement-cost-calculator/](http://www.invo.org.uk/resource-centre/involvement-cost-calculator/)
- Will you offer payment? Will it vary depending on the type of contribution?
- What do INVOLVE or other studies in the region pay?
- How will payment amounts influence recruitment?
- Can PPI representatives choose not to be paid?
- Does the amount offered affect tax, NI or benefits? Will payments be treated as earnings and therefore be liable to tax and NI deductions? What information will you provide representatives about this?
- What information will you provide representatives about payment?

##### **4.2 Payment process**

- How and when will representatives be paid? What is advised by INVOLVE? What is advised by the finance department?
- Does method of payment effect tax, NI, benefits? Does payment in vouchers remove problems with receipt of benefits created by cash payments?
- How long will it take for payment to be received by representatives? Have you let them know?
- What forms and receipts are required by all parties?

##### **4.3 Payment pitfalls**

- Will payment affect a receipt of benefits and if so what information do you need to give a PPI representative about this before paying them?
- If payment is liable to deductions, is the study responsible for ensuring the finance department deducts these, or is the individual required to declare this on their tax return?
- Will reimbursements be processed differently if representatives are also accepting payment? (Both can be seen as earnings and potentially liable to deductions.)
- Are the amounts being offered small enough not to warrant deductions? (See HMRC/University Payment policy.)
- Are your sources of information on payment current and correct, and will the policy be updated to reflect any changes? Is a disclaimer required?

#### **5. Reimbursement**

- What will any reimbursements you pay cover? (Travel, subsistence, childcare, carers etc)
- Do you need to reimburse, or can the study book travel etc in advance?
- Can individuals be reimbursed but not paid?
- Can individuals refuse reimbursement?
- Consider all the issues with regard to payment (above). Do they also apply to reimbursement?

#### **6. Inducting PPI representatives**

- How will you introduce the PPI representatives to the project? Will they meet the study team?
- What support will you provide representatives with?
- Will you provide formal PPI training?
- Have you ensured that the PPI representatives have thought about payment/reimbursement pitfalls?
- Have you ensured that PPI representatives have thought about the degree of involvement they could commit too?
- What information do you need to provide them with in order for them to make an informed decision about involvement?

11 August 2014