PPI Ignite @ UCC: Guidance on Budgeting for PPI in Research Applications Document

1. What is Public and Patient Involvement (PPI)?

Public and Patient Involvement (PPI) can be described as research being carried out 'with' or 'by' members of the public rather than 'to', 'about' or 'for' them. PPI is a mechanism for members of the public or patients (PPI contributors) to contribute to the research process. If patients/members of the public are involved in a research project in any manner other than as a research participant, they are considered PPI contributors. While all PPI projects are different, illustrative examples of possible PPI contributor co-creation include identifying what research is important, checking that the language of materials for participants in a study is appropriate and understandable, participation in data analysis, or in an oversight group/advisory group for a study. PPI contributor co-creation can also involve things like designing and refining the research plan, helping with the recruitment of participants and other aspects of the delivery of the study, and publicising the outputs.

Non/financial recognition is part of the increasing acknowledgement of the important contribution of PPI contributors. Where funding schemes permit, researchers should factor in costs to cover payment for PPI contributors' time, skills and lived expertise and reimbursement of all legitimate/vouched and agreed out-of-pocket expenses.

2. Planning your PPI Budget

a) Researchers are encouraged to budget for PPI in all research funding applications involving patients and/or members of the public. Researchers should follow the guidance provided by the funder/organisation in relation to PPI, budget, and resources, across both the application stage, and management of the grant, should it be budgeted for in advance, where possible.

b) Researchers should always discuss payment and reimbursements of expenses with PPI contributors **in advance of** research project commencement and, if possible, in the research planning phase. Open and transparent discussion about how much budget is available, extent of contributions required, non/financial recognition mechanisms and methods of payment etc.

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c) In some research projects and/or funding schemes, there may not be available budget for PPI activities. It is important to note that PPI can also take place without reimbursement and financial recognition but having an early conversation about PPI will ensure that everyone is clear about the role of PPI and the objectives for both researcher and PPI partners. It is equally important to note that not all PPI contributors want to be paid for their involvement. Payment can also impact social welfare benefits and other payments, taxation etc. Researchers should work with PPI contributors on an individual basis to find appropriate and acceptable ways of recognising PPI contributions.

d) In all cases, researchers should also consider and discuss non-monetary approaches to acknowledge PPI contributions. Examples of this include naming PPI contributors as co-authors on academic and non-academic publications and reports, conference attendance and presentations, training courses, and public acknowledgements. Again, this should be discussed with PPI contributors to ensure that they are satisfied that their contributions are acknowledged in a meaningful and appropriate way.

e) Other costs relating to PPI should also be factored in budgets. These costs include, but are not limited to, access requirements, room hire, catering, printing, stationery and postage, IT devices and virtual meeting subscription fees (for academic members of the research team and PPI contributors).

f) In all cases, all assumptions made to the determination and justification of costs should be clearly outlined and documented in the PPI budget submission document to ensure transparency.

g) The following links are useful illustrative PPI budgeting calculators/templates, as they itemise various types of PPI costs that might need to be budgeted form (bearing in mind that each PPI project will be different)

- PPI Costing Template developed by University College Dublin:
  https://www.ucd.ie/ppi/plan/budgetingforppi/
- INVOLVE PPI Cost Calculator https://www.invo.org.uk/resource-centre/payment-and-recognition-for-public-involvement/involvement-cost-calculator/
- Trinity College Dublin PPI budgeting template:
  https://www.tcd.ie/tcaid/ignite/PPIModule/2/PPIModuleSection2-13.php
- University of Galway PPI budgeting template (Budgeting for PPI section);
  https://www.universityofgalway.ie/ppi/ppiresources/#

h) Finally, if researchers plan to involve a patient, community, or voluntary organisations in PPI in ways that will significantly impact on the patient organisation's staff time and resources, it may be

appropriate for researchers to discuss if a percentage of the grant allocation may be required to cover this involvement, and to request this at grant application stage.

Finally, it is good practice for researchers to have a PPI Contributor payment and recognition overview document in place prior to involvement, so that members of the public know in advance what is being offered and can make an informed decision about getting involved. This document explains, in plain English, what PPI contributors involved should expect before, during and after their involvement, and the processes for claiming payment and expenses during that period.

For queries/comments re this document: please contact ppi@ucc.ie

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