*“I want to pay participants, patients, or partners… what are my options?”*

**The purpose of this document is to help you decide what type(s) of incentives may be best or most appropriate for the participants, patients or partners you engage in your project. Note that this is not an exhaustive list of options for incentives nor all the pros and cons of each type; rather, it is a brief comparison to highlight what is available.**

**This should provoke longer conversations about what incentives are right for your patient groups and engaged researchers, as well as what may be acceptable within the confines of your organizational structure. You should also consider what backup documentation is needed for each incentive, and how you will collect and maintain adequate backup for reimbursement.**

Do you want to provide non-cash incentives to participants?

Yes – Others, Food, Gift Cards

No – Stipends

Do you want to provide more than $50 to the participant?

Yes – Stipend, some Others

No – Food, some Others, Gift Cards?

Are you willing to collect a lot of information about the participant?

Yes – Stipend, Others

No – Gift Cards, Food

Are you willing to collect a lot of backup documentation during a meeting?

Yes – Gift Cards, Food, some Stipends

No – some Others, some Stipends

Do you want the participant to have flexibility in the way they can use the incentive?

Yes – Stipends, some Gift Cards

No – Food, most Gift Cards, most Others

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| **Incentive** | **Pros** | **Cons** |
| Stipends | Recipients can use stipend as cash after the payment is received; can be done in increments such as amount or in timeframes; can be used for various expense categories (phone bill, travel, etc) | W9s are needed if stipend payments exceed $500 in a calendar year |
| Food | Awardees do not have to collect acknowledgement of payment after meeting times; can be a good way to increase attendance especially when meetings are held during mealtimes | A meal alone is often not sufficient compensation for partners; requires lots of backup documentation |
| Other Options | Lots of flexibility to choose what is best for your partners: childcare, travel and/or parking, conferences, trainings, and more… | Can be difficult to get approval for funds and reimbursement for non-traditional incentives |
| Gift Cards | Flexibility to choose what is best for your partners; good for smaller incentives – see below for more details | Requires lots of backup documentation; not universal – see below for more details |

*Note: “Meeting” refers to any type of gathering where food or incentives are provided, such as advisory boards, patient panels/focus groups, town halls, etc*

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| **Gift Card Vendors** | Does not expire | Redeemable online, in store or by phone | No Fees | Free shipping when ordered online | Can be replaced if lost, stolen, or damaged | Reloadable | Refunded if unused | Non Refundable |
| **American Express** | X | X | X |  | X |  | X |  |
| **Visa** | X | X |  |  | X |  |  |  |
| **Amazon** | X | X | X | X | X |  | X |  |
| **Walmart** | X | X | X | X | X | X |  |  |
| **Target** | X | X | X |  | X | X |  | X |
| **Walgreens** | X | X | X |  | X | X |  | X |
| **Starbucks** | X | X | X | X | X | X | X |  |
| **Shell Gas** | X | X | X | X |  |  |  | X |

*Questions about what these rules mean? Call us and ask!*

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| **Incentive** | **Backup Documentation for Awardee under Contract** | **Backup Documentation for Awardee under Letter of Agreement** |
| Stipends | Invoice from contracting organization showing proof of payment – signature, email acknowledgment, or proof of issued check | CFPHE will pay stipend directly to recipient – names and addresses are required so checks can be mailed |
| Food | Invoice from contracting organization showing proof of payment PLUS meeting agenda, itemized receipt, and sign in sheet all required | CFPHE can pay for food in advance; awardee will need to provide agenda and sign in sheet after the meeting |
| Other Options | Invoice showing proof of payment plus whatever is required for the option you choose | CFPHE can pay for most options; awardee will need to provide adequate backup documentation |
| Gift Cards | Invoice from contracting organization showing proof of payment PLUS meeting agenda, receipt for gift card purchase, and sign in sheet with signature acknowledging payment all required | CFPHE can pay for gift cards in advance and send them to the awardee to hand out; awardee will need to provide agenda and sign in sheet after the meeting |

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