



AGE-WELL Guideline on Older Adult and Caregiver Engagement Compensation

1. Purpose and Scope

AGE-WELL is committed to involving older adults and caregivers in all aspects of the research enterprise including participation in 1) advisory bodies to Scientific Directors and the AGE-WELL Board of Directors, 2) program development and consultation 3) grant-making processes including research review and 4) education and knowledge mobilization activities. We believe that better products and outcomes are achieved through the active and meaningful engagement of the individuals our work is intended to support.

This document presents guidelines to inform network decision-making on compensation levels for older adults and caregivers engaged in network activities and programs undertaken by the AGE-WELL Network Management Office. The document does not incorporate specific guidelines for the compensation of older adult and caregiver *research participants*, although the considerations in this document may also apply to the research study context.

In addition, it is important to distinguish between partner roles and professional roles. While an older adult and caregiver may have professional expertise that enables them to offer suggestions from that perspective, when someone is serving primarily in a professional capacity in network activities, this falls under paid employment. Paid employment is outside the scope of these guidelines.

As per the network Funding Agreement with the Networks of Centres of Excellence (NCE), AGE-WELL follows the financial administration guidelines of the Canadian Institutes of Health Research (CIHR). In addition, we abide by the financial policies of our host institution, the University Health Network, with respect to the reimbursement of out-of-pocket expenses and per diem allowances. Expense reimbursement is outside the scope of these guidelines and is covered through a separate network Travel and Reimbursement Policy.

We see parallels between the role of *patient partners* in Canada's Strategy for Patient-Oriented Research (SPOR) program and older adults and caregivers involved in AGE-WELL activities and programs within scope of this guideline. CIHR endorses the premise that patient partners should be compensated for their roles in network activities and separately reimbursed for eligible expenses. AGE-WELL supports this position with respect to older adult and caregiver engagement within the network.

2. Older Adult and Caregiver Compensation Rates

We take our guidance on compensation levels from the *Recommendations On Patient Engagement Compensation* prepared by the SPOR Network in Chronic Diseases and the Primary and Integrated Health Care Innovations (PICH) Network. Networks are recommended to adopt either a rate structure option as outlined in Table 1 or a level of engagement model as outlined in Table 2, or a blend. To accommodate the range of AGE-WELL activities within the scope of this document, a blended approach is warranted.

As discussed in the CIHR considerations document, compensation may take different forms, from cash equivalents (e.g. cheque, gift card) to alternative methods (e.g. in-kind gifts such as the cost of conference attendance). Individuals are free to choose whether they wish to be



compensated or not. Should an individual decline compensation outlined in this document, an opportunity to express alternate forms of acknowledgement and recognition will be provided. Individuals can also change their mind. Decisions and arrangements will be reviewed annually in the case of ongoing engagement such as advisory committee service.

Table 1: Compensation by unit of time

Timeframe	Rate	Detail
Hourly rate	\$25.00	For activities less than 4 hours
Half day rate	\$100.00	+/- 4 hour commitments
Full day rate	\$200.00	+/- 8 hour commitments

AGE-WELL use: consultation activities, e.g. Insight Sessions, focus groups or workshops

Table 1 may also be used to inform the value of honoraria or one-time payments issued as a thank-you for a contribution to an activity where this form of compensation is advertised. This type of payment is appropriate in instances where one-off engagement occurs (e.g. some webinar, conference panel participation, consultations) or if the contribution is short in duration.

Table 2: Compensation by level of engagement

Level of Engagement			Example of Activity	Suggested Compensation
Commitment	Responsibility	Scope		
Commitment to a committee or group (includes meetings, follow-up actions, etc.)	Participates in decision-making by providing options and recommendations	Activity has a network-wide mandate	Member of a committee, council, or working group with more meetings than a single research project.	\$500 to \$750 per year, depending on frequency and numbers of meetings and other factors deemed important by the team
Contributing member in a governing committee (includes meetings, follow-up actions, etc.)	Contributing member in a governing committee (includes meetings, follow-up actions, etc.)	Activity has a governing mandate for a network	Member of steering committee and/or executive committee (e.g. Older Adult and Caregiver Advisory Committee)	\$1000 per year

Dependent on the number of levels of engagement of an older adult or caregiver, the annual compensation package could be additive, meaning participation in more than one category is possible. The compensation rate at each level of engagement is a suggested range based on usual commitment in a category. Therefore, compensation can increase for people who assume greater responsibility or who do more work than is described for a given category.

An annual cap on compensation per older adult or caregiver may be necessary to adhere to budget limitations and potential impact on government assistance. Based on its budget and other considerations, the network will determine such caps. It is possible that compensation that exceeds maximum earnings allowed may alter government benefits such as Old Age Security and Disability Insurance Plans as the different forms of compensation may be considered to be taxable income. We encourage older adults and caregivers to be aware of their maximum allowable earnings to avoid any undesired personal impact.



3. Frequency of Payment

The frequency of monetary compensation will be determined according to the specific engagement and should be agreed upon in advance with the recipient. For monetary compensation, the frequency of payment is recommended to be quarterly at a minimum or immediately following participation in a specific event.

4. Interpretation and Application of this Guideline

This guideline may be used to inform new network policies or apply to activities not currently part of network practice. Any future development of policy and procedures by AGE-WELL and their implementation by network staff will adhere to these principles for research administration and management, adapted from *Recommendations On Patient Engagement Compensation*.

- **Minimal barriers:** To the greatest extent possible, compensation and reimbursement policies should minimize barriers to older adult and caregiver participation and enable inclusion. Policies should aim to cover costs that people might incur in order to participate fully.
- **Dignity and privacy:** Compensation policies should preserve the dignity of all people involved by respecting personal privacy and avoiding requirements of proof of a particular need if possible.
- **Distinction from paid and volunteer work:** Older adult and caregiver compensation policies should avoid overlap with paid and volunteer work. It should not invite application of laws that apply to paid employment, nor should it impact negatively on traditions of volunteering. It is important to honour and respect the work that volunteers do, and to recognize that compensated activities are different.
- **Distinction between compensation and reimbursement:** Compensation for time and expertise brought to AGE-WELL activities should be distinguished from reimbursement for expenses incurred during participation. Both compensation and reimbursement are important, and both should be included in policies.
- **Timelines:** Older adult and caregiver partners should not have to wait too long for compensation or expense reimbursement. Advance payment or payment in cash may be required to avoid a temporary financial burden experienced by an older adult or caregiver partner.
- **Mutual accountability:** Compensation should include an accountability framework to clarify who is accountable to whom, in what cases are advance approvals required and permissible, and other details required to assure timely and appropriate compensation.
- **Reliability:** Policies should ensure that systems are reliable by including checks and balances, internal controls, and other methods of verifying the accuracy of information.

If you have questions about the guideline, please contact info@agewell-nce.ca