Purpose

Estuary Housing Association is committed to offering involved residents out-of-pocket expenses necessarily incurred in their role. The purpose of this policy is:

- To provide a transparent set of procedures relating to how expenses will be paid
- To achieve a standard approach to the claiming of expenses by involved residents and groups
- To provide a simple and easy method of claiming expenses
- To ensure that no residents are prevented from participating in events or meetings due
Responsibilities

- The Performance and Customer Engagement Manager is responsible for implementing and monitoring this policy
- The Performance and Customer Engagement Manager is responsible for authorisation of all spend relating to resident involvement expenses

Policy

1) Definition of Involved Resident

An involved resident will be any resident who is a member of one of Estuary recognised resident involvement schemes, this will include the Federation of Estuary Residents committee, Scrutiny Panel (ERSC), recognised and constituted Residents Associations, EBS reps, Mystery Shoppers, Focus Groups and Core Groups but this list is not exhaustive. An involved resident is a person who volunteers their time, unpaid, to support the work of Estuary Housing Association, in agreement with Estuary staff.

2) Scope

The policy covers all involved residents in all duties and projects undertaken by or on behalf of the organisation. This policy applies to all involved residents of Estuary Housing Association Ltd.

3) Meals and Refreshments

3.1 Tea and Coffee is provided free of charge to all involved residents attending meeting/ groups at any Estuary Housing Association locations, or at any venue provided for involvement by Estuary Housing Association. Where residents may hold meeting within their own homes, refreshments will be provided by Estuary staff in attendance.

If an involved resident volunteers for a minimum of 4 consecutive hours, refreshments costing no more than £5 per head will be provided.

3.2 In some circumstances £5 per head may be exceeded (e.g. conferences and training outside of Estuary). This will be at the discretion of the Performance and Customer Engagement Manager.

3.3 In exceptional circumstances, if a meal or refreshments need to be purchased by the resident, reimbursement will be made in line with the corporate subsistence rate and only with prior agreement by the Performance and Customer Engagement Manager.
4) Travel

Involved residents can claim reimbursement for the travelling costs to and from their place of involvement and other travel costs necessarily incurred in their role as a volunteer. The Performance and Customer Engagement Team will provide guidance on other travel costs that may be reclaimed.

Such costs will be reimbursed at the following rates:

<table>
<thead>
<tr>
<th>Type of expense</th>
<th>Amount to be claimed</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car mileage</td>
<td>Corporate rate</td>
<td>For business related meetings or groups</td>
</tr>
<tr>
<td></td>
<td>50% of corporate rate</td>
<td>For resident attendance at any social event to promote resident involvement. Any resident carrying another involved resident as a passenger will receive an extra 5p per mile in addition to corporate rate. *</td>
</tr>
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<tr>
<th>Type of expense</th>
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<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transport</td>
<td>Variable – at standard rate.</td>
<td>Tickets/receipts must be provided before these can be paid. Residents should travel off peak where possible. For rail travel, Estuary will provide tickets in advance where possible.</td>
</tr>
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<tbody>
<tr>
<td>Taxi</td>
<td>Arranged in advance by Customer Engagement Team</td>
<td>Taxis will be arranged on a case by case basis. No taxi fare will be reimbursed without prior agreement from the Performance and Customer Engagement Manager. Taxis should only be used where public transport is not feasible and should be booked by the Customer Engagement team.</td>
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</thead>
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<tr>
<td>Parking</td>
<td>Variable</td>
<td>Where possible meetings will be arranged at venues without parking costs but where this is not possible parking costs will be reimbursed once a receipt or ticket has been provided. Any fines incurred cannot be claimed.</td>
</tr>
</tbody>
</table>

* If you are using your vehicle for 'business' purpose (including carrying passengers) you must ensure that it is insured for business use. Your insurance policy should state that your cover includes use of your vehicle ‘for occasional business purpose’. Please check with your insurance company as policies differ and they will be able to advise you about your circumstances as a volunteer with Estuary.

This policy is non-contractual and may be subject to change.
Estuary does not accept any responsibility for any accident or damage caused, or any loss incurred during the use of your vehicle for resident involvement. See Resident Car User form.

5) Care Costs

5.1 If agreed in advance by the Performance and Customer Engagement Manager, Estuary Housing Association will cover the childcare or carer costs. You will need to provide a receipt or invoice from a registered care agency or child minder and the cost to be a reasonable amount depending on the local rate. Where the cared for person is in receipt of Direct Payments from the Local Authority, the support worker engaged to deliver the care can also be used with prior consent and supporting documents. The support worker cannot be a relative.

5.2 The Customer Engagement team must be given details in advance and provided with documentation showing the registration status of the provider. No care expenses will be paid to a member of the same household.

6) Telephone, Internet and Computer use

Cost of telephone calls made specifically for resident involvement can be reimbursed on production of an itemised telephone bill, and a log of calls made and purpose.

Internet access and laptops are available for residents to use in Centre Place Family Centre reception from 9am-5pm Monday to Friday. There is one laptop available for loan subject to availability, to be booked at reception in advance. Wi-Fi is available in Centre Place reception for residents to use and this should be taken advantage of where possible.

7) Other Expenses

There may from time to time be additional expenses incurred through involvement. These will be reimbursed on production of receipt and completed expense form if agreed in advance by the Performance and Customer Engagement Manager.

If a tenant feels they have incurred a cost not covered by this policy (for example stationary, postage), then they must contact the Customer Engagement team to discuss this.

8) Rent Arrears

Where an involved resident has rent arrears with Estuary Housing Association, then their reimbursement will be paid into the resident’s rent account.

9) Claiming Expenses

All expense claims must be submitted on Estuary Housing Association’s Residents Expense Form and submitted to the Performance and Customer Engagement Manager for authorisation.

Expenses will be paid in one of the following ways:
• Cheque
• Into residents Estuary rent account
• Into residents bank account.

No claims will be reimbursed by petty cash.

10) General

It is the responsibility of the lead officer for each involvement activity to ensure that involved residents are made aware of this policy. Estuary Housing Association does not expect residents to be out of pocket when undertaking involvement duties. Lead officers are responsible for ensuring that residents undertaking tasks on behalf of the association that incur expenses complete an expenses form and are reimbursed as soon as possible.

Related Policies and Documents

Resident Expense Form
Resident Involvement Statement
I.T Policy