



# PEAKS & PLAINS

Housing Trust

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The Trust

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Involved Customers  
Expenses Policy

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## 1. INTRODUCTION

- 1.1. The Trust recognises the valuable role that customers play in matters relating to their homes and neighbourhoods, promoting accountability, transparency, providing feedback on and improving services, as well as developing future services.
- 1.2. Whilst involved customers act in a voluntary capacity, it is not expected that they should be out of pocket when acting on Trust business.
- 1.3. Involved customers expenses will not be treated as earned income and therefore not be subject to income tax and national insurance if they are paid at the tax free limits i.e. 45p for first 10,000 miles and 25p thereafter.
- 1.4. If any personal tax liability should arise as a result of involved customers activities, the Trust will pay the liability on behalf of the tenant including the liabilities resulting from the payment

## 2. TRAVEL

### 2.1. Travel by public transport

- 2.1.1. The Trust will normally pay standard-class rail fare. However, this may be substituted by discounted first class rail or other transport, provided the cost does not exceed the cost of a standard-class fare for the same journey.
- 2.1.2. Involved customers should make reasonable efforts to inform the Customer Voice Team in advance of the journey, to enable the Trust to benefit from the best rates possible, by booking in advance or arranging discount railcards.

### 2.2. Travel by private motor vehicle

- 2.2.1. The rates of travel by motorcycle/ private motor vehicle are set out in Appendix 1 of this report
- 2.2.2. Where claims are over £25.00 per journey, they should be capped at the cost of a standard class rail fare equivalent.
- 2.2.3. Payment of speeding or car parking fines is the responsibility of the involved customer concerned.

### 2.3. Travel by taxis

- 2.3.1. The rate for travel by taxi will be the amount of actual fare shown on a receipt or they will be booked by the Trust using the contracted taxi provider.

## 3. ACCOMMODATION

- 3.1. Overnight accommodation shall be considered when the participant's personal circumstances such as length of stay away from home, mobility and/or any disability are taken into account
- 3.2. In all cases, where an overnight stay is appropriate, the Trust shall arrange, and make payment for such accommodation in advance.
- 3.3. The accommodation shall be required to provide the appropriate meals from the time of arrival, until the time of departure, and shall be confirmed with/by the Trust in advance.

#### 4. SUBSISTENCE ALLOWANCES

- 4.1. Expenses to reimburse the actual costs of subsistence are also payable to members where, due to carrying out an approved duty, there is an absence from the usual place of residence for a period of time of more than 4 hours and within the time periods as described in the following paragraphs.
- 4.2. These subsistence expenses are paid in order to enable members to purchase an appropriate meal where required. Claims for subsistence expenses should provide details of the approved duty and the time of departure from, and arrival at, the normal place of residence. Receipts should be provided with the claim. Guests will not be paid for except carers of involved customers (see 4.4).
- 4.3. The following rates apply for periods of absence:
  - Breakfast – if the absence from the usual place of residence is for one hour or more before 9.00 am – the cost of the meal (receipted) limited to the rate set in Appendix 1 if not taken in Hotel
  - Lunch - if the involved tenant is absent from the usual place of residence between 12 noon and 2.00 pm – the cost of the meal up (receipted) to the rate set in Appendix 1
  - Evening meal and beverages, if the absence from the usual place of residence is for more than 4 hours ending after 7.00 pm – the cost of the meal (receipted) up to the rate set in Appendix 1 after 6.30 pm (or the Table d'hôte price of the hotel where the involved customer is staying in if this is more than the set rate); and
  - Meals paid for by the Trust as entertaining or as part of training events will not be considered under this policy.

## **5. CARERS**

- 5.1. Carers expenses will be paid in respect of costs necessarily incurred by involved customers in arranging care for:
- A child or children under the age of 15
  - An dependent requiring care
- 5.2. The involved customer claiming for the cost of a carer must notify the Trust of the identity of the carer, who for a claim to be made, must not be a member of the claimant's immediate family or household nor be funded by any other means.
- 5.3. Involved customers who need a carer themselves to fulfil their duties as an involved customer, can claim the carers expenses in line with this policy as if the Carer was an involved customer, provided the expenses are not already funded and have occurred directly and exclusively as a result of the involved customer fulfilling their duties.
- 5.4. The rate of carers' expenses is set out in Appendix 1.

## **6. CONFERENCES AND TRAINING**

Involved Customer may claim travel and subsistence expenses as set out in this policy provided that their attendance at the conference/ training has been formally approved in advance.

## **7. BREACH OF CODE OF CONDUCT**

The right to travel and subsistence expenses will be removed whilst an involved customer is suspended from customer voice activity for breach of the Code of Conduct or for any other reason.

## **8. PAYMENT OF EXPENSES AND RESPONSIBILITIES**

- 8.1. All claims must be submitted in a timely manner, on the appropriate claim form and be signed by the claimant. The items and amounts claimed should be stated clearly including details of car mileage undertaken or fares paid. Involved customers are responsible for ensuring that their claims are accurate and complete and that receipts are provided and attached to the claim form, in respect of any items of expenditure forming part of the claim
- 8.2 Claim forms must be submitted to the Customer Voice Team within 2 months of the relevant meeting taking place. Late claims will not be accepted and entitlement to the expense claim will be lost.

- 8.3. Claims will be processed and paid into the claimants' bank account within 28 calendar days of submission of the claim. The Trust does not offer other options for payment of the claims.
- 8.3. Involved customers remain responsible for the accuracy of the claims they submit. If the claim form is unsigned or unclear it will be returned to the claimant for completion/clarification, rather than processed for payment. If involved customers are unclear how to complete the claim form they should consult the Customer Voice Team.
- 8.4. If a claim or part of a claim is disallowed the involved customer will be informed within 10 working days and given a reason, the Trust shall pay any/all undisputed amounts of the claim as outlined in the payment process. If the involved customer does not agree with a decision to disallow a claim, they then have 10 working days to ask for the matter to be reconsidered by the Customer Voice Team and Head of Customer Experience, whose decision on the subject will be final

**9. REVIEW OF EXPENSES RATES (APPENDIX 1)**

- 9.1. Rates will be reviewed annually by the Governance Committee

**POLICY INFORMATION**

Policy Statement Name:	Involved Customers Expenses Policy
Status:	V5
Approved by:	Executive Management TAM
Drafted By:	Head of Customer Experience
Date approved:	01/12/2022
Next Review Date:	December 2024

## APPENDIX 1 – INVOLVED CUSTOMERS EXPENSES POLICY / EXPENSE RATES 2022/ 23

These rates will be reviewed annually and approved by Governance Committee.

<b>TRAVEL</b>	
Travel by Motorcycle	24p per mile
Travel by Private Motor Vehicle	45p per mile for the first 10,000 miles and 25p thereafter
Hybrid Car mileage will be paid at the rate above	

Where claims are over £25.00 per journey, they will be capped at the cost of a standard class rails fare equivalent.

Travel by Taxi where appropriate	The actual fare shown on a receipt or taxi's will be booked by the Trust using their contracted taxi provided.
Travel by Public Transport	Will not exceed standard rail fare

<b>SUBSISTENCE</b>	
Breakfast	Limited to £10
Lunch	Limited to £10.00
Dinner	Up to £15 after 6.30pm (or table d'hôte price)

<b>CARERS AND CHILDCARE</b>	
The rate of carers' expenses is	£10.90 per hour*

\*Based on real living wage hourly rate [Living Wage Foundation | For the real cost of living](#) (to be adjusted should this rate change).

<b>INTERNET / BROADBAND</b>	
The rate is for involved customers that are standing members of the Trust's Challenge Group, where digital communications are being reviewed by the group on behalf of the Trust	Limited to £10.00 per month