

## Resident Expenses and Incentives Policy

### 1 Purpose

- 1.1 The purpose of this policy is to ensure that:
- Residents have a clear and transparent procedure for eligible expenses that can be claimed for resident influence activity
  - We operate a consistent approach to resident expenses and incentives across Octavia
  - There is a straightforward method of claiming expenses
  - We cover the financial cost of all qualifying resident influence activities arranged by Octavia

### 2 Scope

- 2.1 This policy applies to tenant and leaseholders (which, for the purpose of this document, are referred to as 'residents').

### 3 Aims and objectives

- 3.1 We aim to provide excellent services to residents, and to be an organisation that they really value. To achieve this, we involve residents so they can genuinely influence our work.
- 3.2 Our Resident Influence strategy outlines our approach to working in partnership with residents to improve services, homes and outcomes. We provide a variety of ways in which residents can influence our services, such as being a member of our panels, attending a focus group or workshop, responding to surveys, becoming a mystery shopper or as members of our Board.
- 3.3 When a resident takes part in an influence activity we cover their reasonable costs, and sometimes offer incentives to encourage their involvement. We will ensure that:
- resident influence activities to improve services are free for residents;
  - our expenses and incentive payment processes are fair and transparent.

### 4 Definitions

- 4.1 For the purposes of this policy, Octavia defines resident influence, expenses and incentives as:
- **Resident Influence** can cover informal and formal activities. Informal activities may include, for example, discussions with residents and feedback to staff on services. Formal activities may include events such as services forums, and focus groups.

When we refer to influence activities in this policy we are referring to formal activities.

- **Expenses** are payments we make to residents to cover costs that they have incurred because of being involved in a resident influence activity such as travel or carers costs.
- **Incentives** are one way we encourage residents to be involved. Incentives can be financial such as prize draws with voucher prizes, or non-financial such as branded gifts, food and drink or entertainment.

## 5. Legislative / regulatory context

- 5.1 As a registered social landlord, Octavia has a regulatory responsibility to ‘support residents to develop and implement opportunities for involvement and empowerment’. As set out in the Regulator of Social Housing’s Tenant Involvement and Empowerment Standard.

## 6 Policy Statement

### 6.1 What you can expect from our service:

When you make a claim for expenses or an incentive payment for a one-off activity, we will refund you within 20 working days.

If you are a regular member of a group, and you make a claim for incentives, we will make the payment to you within 20 working days.

If your expenses claim is for more than we have agreed, or for items or services we do not cover, we will write to you within 10 working days to let you know which parts of the claim we will cover.

### 6.2 How do I claim expenses?

- When you take part in a resident influence activity, we will let you know what expenses you are able to claim.
  - **Claiming your expenses:** You should complete an Involvement Expenses and Incentives claim form and submit it to the member of staff responsible for the event, along with receipts / proof of purchase. Generally, we will transfer the money to your bank account within 20 working days.
  - **Expenses for items / services we do not cover:** If we think you have spent too much or you have spent money on services / items we do not cover, we will write to you within 10 working days to let you know why we will not be covering the expense.

### 6.3 Incentive payments for one off activities

- If you take part in a one-off activity, such as a focus group, a Resident Researcher project or our Digital Policy Panel (Click), you may be able to claim an incentive payment by completing the Expenses and Incentives claim form. These payments will usually be made in the form of shopping vouchers, and you will receive the incentive within 20 working days.
- If you are the winner of a prize-draw, you will receive the prize within 20 working days.

## 6.4 Payment amounts

- The following provides guidance on payment amounts for some of our main resident influence activities:

<b>Expenses</b>	
<b>Activity</b>	<b>Amount</b>
Public transport	Reimbursed for cheapest fare available, proof of journey needed (season ticket holders excluded unless they travel out of zone).
Driving	47p per mile
Parking	Parking fees over meeting period are reimbursed - receipt needed.
Congestion charge	Congestion charge (but not fine) reimbursed if the meeting is at a venue / time when the charge applies - receipt needed.
Taxi	Applies to residents who are unable to use public transport only – on corporate taxi account (must get prior staff agreement first).
Bike	20p per mile
Food and drink	Food and drink is usually provided for long events/meetings. Where not provided, we reimburse up to a limit of £10 - receipt needed.
Carers	Up to £11 per hour for care of children or other dependents – receipt needed.

<b>Incentives</b>	
<b>Activity</b>	<b>Amount</b>
Attending a focus group	£30 for 2 hour session, £50 for 3 hour or longer session
Resident Researcher project	£50 on completion of agreed project
Mystery shopping exercise	£30 on completion of remote exercise, £50 for completion of in person exercise
Task and Finish Group	£50 (for up to 1 day), £80 (for 2 days or more)
Completing a survey	Some surveys include a prize draw.

## 7 Equality, Diversity and Inclusion

- 7.1 We will apply this policy fairly and consistently. We will deliver all services and activities within the spirit and context of current Equality legislation including the Equality Act (2010).
- 7.2 We will not discriminate against any person or group of persons on the grounds of: age; disability; gender reassignment; marriage or civil partnership; pregnancy or maternity; race; religion or belief; sex; sexual orientation.
- 7.3 This policy has a positive impact on those with disabilities or living with a dependant by ensuring that they are reimbursed for costs associated with their care as a result of getting involved.

## 8 How we will manage your personal data

- 8.1 We will record customers personal information relating to the areas described in this policy, and this information will be held and processed in line with our privacy notice and the Data Protection Act 2018.

## 9 Contact for further information

- 9.1 For more information on expenses and incentives you can contact the Resident Involvement Manager–
- Tel: 020 8354 5500
  - Email: [be.involved@octavia.org.uk](mailto:be.involved@octavia.org.uk)
- 9.2 Alternatively you can speak with your Customer Housing Lead Officer / Supported Housing / Support Officer for more details.

## 10 Governance

<b>Consultation</b>	TPAS worked with Octavia and a selection of involved residents, non-involved residents and Your Voice residents on resident incentives between November 2021 and January 2022.
<b>Associated documents</b>	Resident Involvement Expenses and Incentives Procedure
<b>Policy category</b>	Operational
<b>Approved by</b>	Head of Partnerships, Insight and Performance
<b>Policy Owner</b>	Resident Involvement Manager
<b>Date approved</b>	21/12/2023
<b>Date effective</b>	21/12/2023

<b>Next Review date</b>	December 2026
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### 13 Revision history

<b>Date of revision</b>	<b>Author</b>	<b>Revision detail</b>
June 2023	Peter Walkinshaw – Resident Involvement Manager	<ul style="list-style-type: none"> <li>• Reference to ‘Connect Strategy’ updated to refer to ‘Resident Influence Strategy’.</li> <li>• Reference to ‘involvement’ updated to refer to ‘Influence’.</li> <li>• Reference to ‘Mystery Shopper’ added.</li> <li>• Reference to ‘cash’ removed.</li> <li>• Section on ‘incentive payments for regular involvement’ removed.</li> <li>• Reimbursement for ‘Food and Drink’ increased from £5 to £10.</li> <li>• Reimbursement for carer costs increased from ‘£9 per hour’ to ‘£11 per hour’.</li> <li>• Incentive for attending a ‘focus group’ increased from £20 to a range of £30 - £50.</li> <li>• Incentive for taking part in ‘Resident Researcher projects’ increased from £25 to a range of £30 - £50.</li> <li>• Incentive for taking part in a ‘task and finish group’ increased from a range of £25 - £40 to a new range of £50 - £80</li> <li>• Reference to ‘Resident Services Officer’ updated to refer to ‘Customer Housing Lead Officer’.</li> </ul>