





EPA Travel, and Subsistence Policy

THIS POLICY WAS AGREED BY TRUSTEES ON (Date):	21 st November 2024
REVIEW DATE (every 3 years):	November 2027
CHAIR OF TRUSTEES:	
CEO:	

Introduction

If an individual is not sure whether they will be able to make a claim in a particular situation, they should ask before they incur any expenses, as this may not be reimbursed. Clarity should be sought before a claim is submitted.

It is very important that claims are not made outside the terms of this policy and guidance unless permission has been given specifically to deal with a particular situation.

Expenses incurred by Trustees and Governing bodies form part of this policy, with any claims being authorised by the Chair or in the case of the Chair by the CEO.

Travel

General Principles

Employees should only make business journeys when they are absolutely necessary. Other options should always be considered before travel is undertaken which are more efficient and cost effective: for example email, telephone, zoom etc.

Where a business journey is necessary, employees are expected to organise it in the shortest and most effective way.

Employees whose post requires them to undertake business travel are responsible for their own travel arrangements and these must be carried out in the most effective and efficient way to perform the job. EPA will support necessary business travel, including reimbursement of costs arising from the use of employees' own vehicles.

Environmentally friendly travel should be encouraged. Mileage payments will be made within Her Majesty's Revenue and Customs (HMRC) guidelines.

Mileage Payments

Employees who use their own car, van, motorcycle or cycle for official MAT work purposes are entitled to be reimbursed in accordance with HMRC approved mileage rates. Where a number of employees undertake the same or a similar journey, they should always travel together. The rates are currently (September 2024). An employee who takes a passenger in their own car or van on a business journey, is entitled to passenger payments of up to 5p per mile.

First 10,000 miles	45p per mile plus 5p per mile paid for each passenger paid to the driver
Over 10,000 miles	25p per mile plus 5p per mile paid for each passenger paid to the driver

Training event	20p per mile plus 5p per mile paid for each passenger paid to the driver
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The basic criteria for claiming official mileage is that this should be calculated from the employee's workplace and back again. Normal everyday home to office mileage is the employee's responsibility. Where it is more beneficial for employees to travel direct from home to an outside appointment or vice versa, rather than call in to the workplace first, they are only entitled to claim the number of miles over and above their normal home to work mileage. On this basis, all travel claims in any one day should always exclude the employee's normal home to office miles regardless of the reason e.g. training course etc.

The only circumstance in which normal home to office mileage is payable is where a second journey from home to a place of work is made on the same day in order to carry out official duties. Where an employee agrees to work on a day they would not normally work, it is still their responsibility to get to and from work (including training courses). Therefore, no home to office mileage is payable.

Other conditions

Where an employee is required to travel from their normal workplace to carry out their day to day role, travelling time is included within their normal working day. However, employees who are expected to travel to training courses can claim no more hours than their normal working day including travelling time. Where there are excessive demands placed on an employee, for example very long distances travelled which extend significantly over the working day and where such occurrences happen repeatedly over a short period of time, then management will have discretion, as a gesture of goodwill, to allow some time in lieu as recompense.

Business use Motor Insurance

Employees who use their own vehicle for work should ensure they have the appropriate insurance to cover business travel. This is normally referred to as 'Business, Social and Domestic' cover by Insurance companies. It is the employee's responsibility that they are insured. See also the Driving at Work Policy.

Rail Travel

If an employee requires a rail ticket for business purposes they must contact the authorised person who can organise this for them.

Employees are expected to travel standard class and take advantage of off peak or other reduced rates such as split tickets if the circumstances allow. First Class travel may be only be used in exceptional circumstances with prior consent of CEO/Chair.

Parking Expenses and Fines

Bus fares and car-parking charges incurred on Academy business may be reclaimed in full. EPA will **not** reimburse in respect of parking and similar fines.

Accommodation

All overnight stays must be appropriate, relate to business needs and provide value for money. These need to be approved in advance by the appropriate authorised officer.

In some situations, particularly certain training courses, accommodation is provided as part of the package, in which case employees do not need to make any claim. In other cases, the employee will be reimbursed the actual cost of bed and breakfast incurred.

Non refundable expenses

Claims for the purchase of alcohol, parking fines or any motoring offences will not be reimbursed.

Out-of-pocket Expenses

Employees attending residential training courses are entitled to claim an allowance to cover incidental out-of-pocket expenses (e.g. telephone calls to home). The amount is published with other allowance figures and is updated annually on 1st April; payment of the allowance is limited to 6 weeks for any one course.

Exceptionally, if employees need to travel abroad, escorting clients/pupils, attending conferences etc., a separate allowance in respect of out of pocket expenses may be claimed.

Eye sight test

Annual eye sight tests for DSE users may be claimed through expenses.

The EPA will pay for basic glasses only if a separate pair is required from normal use for display screen equipment. The cost must be agreed with the AFM prior to purchase.

Authorisation

The formal responsibility for authorising business journeys rests with the Head (or Chair if the Head/CEO is claiming). Employees are advised to seek approval in advance for any unusual journeys where there is likely to be any doubt about the legitimacy of the journey or of the amount of mileage that can be claimed.

Methods of Claiming

Employees should complete the Expenses Claim, scanning and attaching the relevant VAT receipts. Claims should be made on such dates notified by the Finance & Payroll Team and submitted immediately to cost centre budget holder/Head in order that processing by the

APO may take place in time for the following month's payroll. Claims must be made on a monthly basis; if an employee delays and then submits forms covering a substantial period they must expect a delay in processing and payment.

Employees should note the terms of the declaration on the claim form. No one should make or approve a claim if the conditions explained in this policy have not been met. EPA will take a very serious view of fraudulent or negligent claiming or certification.