

# Expenses policy for Freelancers at Emil Dale



## Table of Contents

<b>1. Introduction</b> .....	2
1.1 Purpose and Scope.....	2
1.2 Location of Policy .....	2
<b>2. Policy</b> .....	2
<b>3. Travel rates</b> .....	2
3.1 Public Transport and Taxi .....	3
<b>4. Props or costume for Projects with a prior agreed budget</b> .....	3
<b>5. Printing</b> .....	3
<b>6. Outreach events/ activities</b> .....	3
<b>7. Training</b> .....	4
<b>8. Non-qualifying expenses</b> .....	4
<b>9. Procedure for payment</b> .....	4
<b>10. Loans and advances</b> .....	5
<b>11. Document control</b> .....	6

## 1. Introduction

For the purposes of this policy, the abbreviation of Emil Dale School of Performing Arts Limited (EDSA) will be used to cover business operations from Emil Dale Academy, Emil Dale Part-Time and The Factory Playhouse.

As a Freelancer for Emil Dale School of Performing Arts Limited (EDSA) you may need to pay for some goods or services while doing company business. EDSA intends to reimburse any business expenses providing that they have been agreed prior to spend.

### 1.1 Purpose and Scope

This policy sets a framework for claiming expenses incurred on behalf of EDSA by Freelancer's **only**. For other staff members or stakeholders, a separate policy applies. The policy ensures Freelancer's act reasonably when incurring expenses.

### 1.2 Location of Policy

This policy is available to access EDSA's Microsoft Teams and will be emailed to all Freelancer's. It can also be requested by emailing [accounts@emildale.co.uk](mailto:accounts@emildale.co.uk).

## 2. Policy

This policy provides guidance to Freelancer's for claiming expenses incurred by them when undertaking activities on behalf of EDSA. The policy includes details of the types of expenses that may be claimed, and the procedure for making the claim.

For expenditure, incurred on behalf of EDSA that does not fall within the normal definition of a business expense, it is imperative that approval is obtained from a budget holder in advance of incurring the expenditure. Budget holders are the Business, Compliance & Strategy Manager, and the Principal **only**.

All staff must seek value for money and claim reasonable expenses where it is authorised and appropriate. For example, if a Freelancer is authorised to buy props for a project, they must seek to purchase an economical, value-for-money version of an item. Similarly, if a Freelancer is claiming travel expenses, they should seek to buy the most economical version of their travel (i.e. first class travel will not be reimbursed if there is an option for standard travel fares).

If a budget has been allocated to a Freelancer to purchase items to be claimed back as expenses, that does not mean the Freelancer must spend all of the money allocated. For example, if a budget of £200 has been allocated but the Freelancer only requires £150 worth of items, they then should **not** seek to spend the remaining £50 unnecessarily.

Additional unusual expenses will be paid by EDSA providing they are agreed prior to being spent/bought, by written agreement of either the Business, Compliance and Strategy Manager or the Principal. Suitable receipts must then be provided for those expenses incurred.

Some expenses made while conducting company business may be exempt from reimbursement, as listed in this expenses policy.

## 3. Travel rates

Emil Dale School agrees to pay travel to Freelancers according to the following rates.

- Train/ tube – up to £20.00 per day (copies of receipts must be provided)
- Car – up to £20 per day – mileage calculator to be demonstrated from home address to the location of teaching work, at a rate of 0.25p per mile.\*\*\*
- Bus/ coach – up to £20 (copies of receipts must be provided)

*Note\* a freelancer can only claim a maximum of £20 per day, even if they have to use multiple modes of transport to get to EDSA. For example, if a freelancer uses both train and taxi to get to EDA, and the receipts are £18 for train, £5 for taxi, the freelancer must submit copies of both receipts and will be reimbursed a maximum of £20.*

**\*\*\* No travel claims can be made if the Freelancer is travelling from within a 20 mile radius of SG4 OTP. In this instance, You are expected to meet the full cost of all journeys between your home and EDSA.**

If a Freelancer is required to teach at the Knights Templar School, EDSA agrees to pay an additional fee of £5 for the journey providing that the Freelancer is incurring the cost of the journey themselves. I.e. if the Freelancer is getting a lift from another person or is travelling on the coach, they are not entitled to claim the additional £5.

Note\* If a Freelancer were required to work from home to deliver classes, then no travel expenses are incurred and therefore travel expenses cannot be claimed despite it being a working day.

### 3.1 Public Transport and Taxi

Taxis are a very expensive way to travel and should be avoided in favour of buses, trains and tubes/underground. Use of taxis is limited to absolutely essential need or when a taxi is taking enough people to make it more cost effective than other forms of transport. Please ensure you obtain prior approval from your line manager/director in writing via email before incurring taxi costs you intend to reclaim in expenses.

Costs of public transport and taxis incurred directly in the course of EDSA business, including travel to and from airports from Outreach events, may be reclaimed upon presentation of a valid receipt.

Taxi fares for journeys between the office/home and EDSA/local railway station may not normally be reimbursed. However, a taxi would be permissible to a local railway station if large and heavy items of luggage are being carried whilst travelling on business. If in doubt, please speak to the Business, Compliance & Strategy Manager.

## 4. Props or costume for Projects with a prior agreed budget

Some projects or class presentations at Emil Dale Academy are allocated a budget, which is communicated in advance of the commencement of project.

The project/ class lead will be responsible for managing the budget, and claiming expenses incurred back according to the procedure presented below in Section 8.

## 5. Printing

EDSA agrees that printing required for Freelancer's classes or specifically related to EDSA classes (full-time or part-time) can be printed on-site at EDSA and will not be chargeable to the Freelancer.

Any additional printing (personal printing) must be paid for by the Freelancer at a rate of 10p per print side, made payable at reception. **No tabs allowed.**

For more information on the process for requesting printing, please refer to the Freelancer and Staff Handbook.

## 6. Outreach events/ activities

For any outreach events or activities, EDSA will arrange and pay for travel and accommodation for the event.

EDSA will only pay travel expenses from the Freelancer's home to the venue, and return.

EDSA will pay for meal expenses incurred at Outreach events (note\* there will be a cap on this expenditure depending on the requirements of the day – all expenses will be agreed prior to the Outreach event being organised and agreed).

## **7. Training**

From time to time, EDSA may ask for a Freelancer to undertake training that they believe necessary for that staff member to undertake their work safely and support the work of the Company i.e. safeguarding or first aid.

EDSA will pay for this without expenses having to be incurred by the Freelancer.

In the event that training expenses do need to be incurred by the Freelancer, EDSA will reimburse them according to the procedure below.

Note\* EDSA will not pay for Freelancer training that isn't deemed as a requirement of the Company. If a Freelancer wishes to undertake their own continued professional development through training courses, this is at their own expense.

## **8. Non-qualifying expenses**

Emil Dale School of Performing Arts will not pay expenses listed below:

- When expenditure has been spent without prior agreement from the Business, Compliance & Strategy Manager or Principal.
- Meals/ food including food from the café. Note\* no tabs in the café, all food or drink must be paid at the time of collection from the café.
- Travel expenses above the £20 per day.
- DBS or safeguarding checks.
- Personal insurance for the Freelancer (i.e. public liability insurance).
- Lodging/ accommodation.
- Tolls.
- Informal meetings, gatherings or social events.
- Props or costumes where a budget has not been prior agreed for a project or class activity.
- Work-related software.
- Music/ tracks.
- Sheet music.
- Reimbursement for broken or damages devices.
- Mobile phone or internet usage.
- Loss of personal property whilst on-site or travelling to EDSA.
- Vehicle fines (such as parking or speeding fines).
- Office supplies outside of those required to deliver the Freelancer's work.
- Visas or passports for business travel.
- Additional travel requested by a Freelancer at outreach events for personal travel requirements (note\* EDSA may agree to provide the freelancer with the equivalent monetary value for a return journey rather than pay for tickets that may not be used).
- Training outside of courses requested by EDSA.
- Counselling or welfare support.
- Formal wear expenses.
- Child care.
- Personal grooming expenses.
- Laundry or dry cleaning fees.
- Personal entertainment fees.
- Travel incidentals.
- Physio, osteopath or other such physical treatment options.
- Medical expenses.
- Tax payments.
- Interest, card charges or fees incurred as a result of paying for expenses.
- Working from home expenses (such as internet) or travel expenses when working from home.
- Professional subscriptions.
- Interview/ microteach expenses.

This list is not exhaustive – if in doubt please speak to the Business, Compliance & Strategy Manager.

## **9. Procedure for payment**

1. The Freelancer will be responsible for purchasing expenses. Emil Dale Academy will not pay expenses in advance unless special consideration is granted by the Business, Compliance & Strategy Manager.

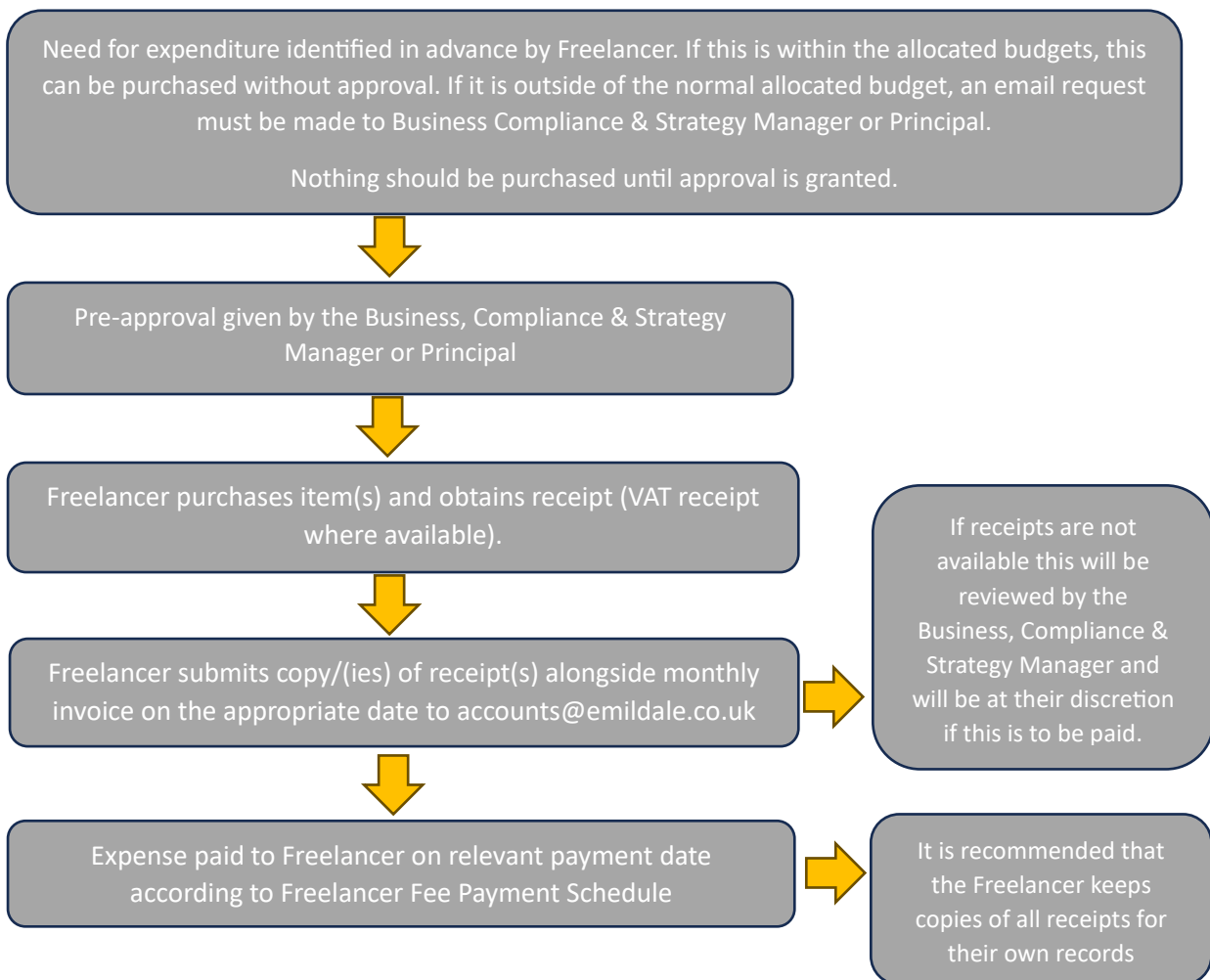
2. The Freelancer must submit copies of expense receipts alongside their invoice for fee payment on a monthly basis. Dates for submission are listed on the Freelancer Fee Payment Schedule.

**Expenses must be listed on the invoice separately from the Freelancer's fee.**

3. Expenses will be paid alongside the Freelancer's invoice on the pay date specified on the Freelancer Fee Payment Schedule.
4. Freelancers must keep their original copies of receipts and should keep this documented for their own records.

For the avoidance of doubt, the freelancer will pay expenses (with prior agreement, unless travel expenses as specified), to be reimbursed alongside the Freelancer's fee paid in accordance with the Freelancer Fee Payment Schedule. If receipts are submitted after the monthly submission date, it will be paid on the next monthly run.

In the event that a receipt cannot be provided, expenses submitted will be reviewed but it is however, at the discretion of the budget holder whether or not that item is approved for payment.



## 10. Loans and advances

Loans and advances will not be paid to any Freelancer, and should not be requested unless the required expense is a large sum of money that the Freelancer cannot meet. This must be requested via the Business, Compliance and Strategy Manager.

## 11. Document control

<b>Version Number</b>	<b>Date of Issue</b>	<b>Review Date</b>	<b>Author</b>	<b>Changes Made/ detail</b>
01	4 <sup>th</sup> August 2023	July 2024	Sarah Moore	First issue