

Apprenticeships Travel Expenses Policy

Metadata Training

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1. Policy Brief/Introduction

Claims for Travel and other expenses are not covered by the apprenticeship levy. No additional cost will be charged to the employer. Metadata will cover their own expenses until the end of apprenticeship programme. Our policy is in-line with the ESFA Apprenticeship funding rules for main providers (August 2019 to July 2020).

2. What can be funded - Eligible costs

1. Apprentices can only be enrolled against an apprenticeship standard once it is identified as 'approved for delivery' on the Institute for Apprenticeships and Technical Education website. We must make sure that the apprenticeship is eligible to access public funds in the employer's apprenticeship service account or government-employer co-investment before the individual starts.
2. Funds from an employer's apprenticeship service account, government-employer co-investment or the additional uplift paid for 16 to 18-year olds on frameworks must only be used for eligible costs directly related to the individual apprenticeship. These funds must only be used to pay for training and assessment, including end-point assessment, to complete an apprenticeship that is eligible for funding up to the limit of the funding band.
3. Metadata eligible costs for the delivery of training and on-programme assessment (that can be included in field "TNP1" on the ILR) are limited to the following:
 - Off-the-job training through a us or supporting provider, or evidenced costs for employer-provider delivery. This could include:
 - I. Some or all of the training aspects of a licence to practice or non-mandatory qualification. In both cases there must be a clear overlap between this training and the knowledge, skills and behaviours needed for the apprenticeship.
 - II. Self-directed distance learning (where it forms only part of the learning experience), interactive online learning (virtual classrooms) or blended learning relating to the off-the-job training element of an apprenticeship (clause 39(vi)).
 - III. Time spent by employees/managers supporting or mentoring apprentices. By this we mean the delivery of knowledge, skills and behaviours directly linked to the apprenticeship.
 - IV. Registration, examination and certification costs associated with mandatory qualifications excluding any licence to practice (see clause 3(vii)).
 - V. Regular planned on-programme assessments (tripartite progress reviews involving the metadata, employer and apprentice) to discuss progress to date against the commitment statement and the immediate next steps required.
 - VI. Materials (non-capital items) used in the delivery of the apprenticeship. By materials (non-capital items) we mean the equipment or supplies necessary to enable a particular learning activity to happen. These items would not normally have a lifespan beyond the individual apprenticeship being funded.

- VII.** Any administration directly linked to training and assessment, including end-point assessment. This includes costs relating to the ongoing development of existing teaching materials, lesson planning, the management of subcontractors, the processing of the ILR and quality assurance.
- VIII.** Additional learning and/or the cost to resit an exam linked to a mandatory qualification. Additional learning required to retake an end-point assessment.
- IX.** Accommodation costs for training delivered through residential modules where the residential training is a mandatory requirement for all apprentices. By mandatory we mean that there is a specific requirement in the apprenticeship which would apply equally to any apprentice, regardless of their location, employer or Metadata (including subcontractors).
- X.** Costs of an apprentice taking part in a skills competition if the employer and metadata have agreed that participation in the competition directly contributes to helping that individual achieve the apprenticeship
- XI.** The costs of taking part in any of the above activities may be included in the total negotiated price of training and end-point assessment. The employer and the metadata agree the price of the training and on programme assessment (field TNP1 on the ILR). For standards, the employer and the end-point assessment organisation agree the price of the end-point assessment (field TNP2 on the ILR).
- XII.** If the total negotiated price (TNP1 and TNP2) exceeds the maximum of the funding band, then the agreed total must be recorded on the ILR. The employer must pay in full the difference between the band maximum and the total negotiated price.
- XIII.** Where the third party is the apprentice's employer then only actual costs will be funded and these must be recorded.
- XIV.** Funds from an employer's apprenticeship service account or government co-investment must not be used to fund other services from a third party.

3. Ineligible costs.

- Metadata and the delivery of training and on-programme assessment, ineligible costs includes the following:
 - I. Enrolment with us (or subcontractor) induction, initial assessment, initial diagnostic testing, or similar activity.
 - II. Travel costs for apprentices under any circumstances.
 - III. Apprentice wages.
 - IV. Personal protective clothing and safety equipment required by the apprentice to carry out their day-to-day work.

- V. Development of original teaching materials related to the delivery of a new apprenticeship offer.
- VI. Off-the-job training delivered only by self-directed distance learning.
- VII. Any training, optional modules, educational trips or trips to professional events in excess of those required to achieve the apprenticeship. This includes training solely and specifically required for a licence to practice.
- VIII. Any fees to third parties associated with a licence to practice. This includes registration, examination and certification costs. This applies even where a licence to practice is specified in the apprenticeship standard and assessment plan.
- IX. Any fees to awarding bodies for non-mandatory qualifications (qualifications that are not specifically listed in the standard). This includes registration, examination and certification costs.
- X. Student membership fees that are required by professional bodies, even where linked to mandatory qualifications.
- XI. End-point assessment costs incurred by the Metadata. These should be included in the price negotiated between the employer and the endpoint assessment organisation.
- XII. English and Maths up to level 2 (this is funded separately). Repeating the same regulated qualification where the apprentice has previously achieved it, unless it is a requirement of the apprenticeship or for any GCSE where the apprentice has not achieved grade C, or 4, or higher.
- XIII. Accommodation costs where the apprentice is resident away from their home base, because of the requirements of their day-to-day work or because this is convenient for the employer or metadata. Residential costs associated with non-mandatory 23 learning, including qualifications and outward-bound activities, are also excluded.
- XIV. Capital purchases including lease agreements. Capital purchases are long-term assets that would have a lifespan beyond the apprenticeship being funded, such as land, buildings, machinery and ICT equipment (e.g. tablets and similar electronic devices).
- XV. Maintenance of capital purchases. This includes vehicle parts and labour, insurance and MOT.
- XVI. Time spent by employees/managers supporting or mentoring apprentices, where this is not delivering training required as part of the apprenticeship (e.g. generic line management responsibilities).
- XVII. Specific services not related to the delivery and administration of the apprenticeship. This includes the recruitment and continuing professional development of staff involved in apprenticeships, company inductions, managing agents, brokerage services (to an employer or main provider) and the costs of memberships or other costs paid to employers, or their representatives, associated with procurement registers or opportunities to secure

business.

- XVIII.** We must not pay inducements or any other payment not authorised by us to an employer, another training provider or to an end-point assessment organisation in relation to any part of the apprenticeship programme.

4. ESFA -Use link to see other apprenticeships funding rules

- https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/857045/1920_Provider_Rules_Version_2.0_FINAL.pdf
- <https://www.gov.uk/guidance/apprenticeship-funding-rules>