Grace Foundation Expenses & PR Guidance

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Grace Foundation Expenses & Purchase Requests Guidance: Updated September 2026

Claiming back Expenses

- Where an employee makes a purchase for business purposes, this may be reclaimed through the expenses process.
- To claim back an expense, an Expense Form must be completed, authorised by your Line Manager, and submitted to financegf@grace-foundation.org.uk.
- Any purchase of **£100 or more** must have prior Line Manager approval; otherwise reimbursement may not be made.
- Details of the item(s) purchased and the purpose of the purchase (e.g. enrichment club resources) must be included on the form.
- Expense forms must be submitted within **90 days** of the original expense; late claims will not be reimbursed.
- Proof of purchase is required for all items (excluding mileage). Please keep your receipts and attach a photo on the *Receipts* tab of the form.
- Personal purchases must always be paid for separately. Combined transactions may result in your claim being rejected.
- Mileage claims must include a full description of the journey (e.g. meeting details, course attended, or meeting location).
- Please allow up to two weeks after authorisation and submission for reimbursement. If payment has not been received after this time, please contact Finance.
- If you are submitting an expenses form for the first time, please also include your bank sort code and account number in your email (Shelley does not have access to Payroll details).
- All expense payments are recorded and tracked against your School's annual spending budget.

Drop Down Days & External Guests

- When purchasing catering for an event (e.g. Culture Days), the maximum total amount that will be approved is **£400.** Any cost above this must be funded by the school. Prior approval from your Cluster Leader is required, otherwise reimbursement will not be made.
- Where an external guest is attending a school for a Drop-Down Day or Workshop (e.g. Values Day, BHR Day, ROPP) and is charging Grace Foundation for their time, lunch should be provided by the school. If this is not possible, lunch up to the value of **£5 per head** (for the guest(s) only) may be purchased and reclaimed through expenses.

Accommodation/Breakfast:

- If you are required to stay overnight for business purposes, Grace Foundation will cover the reasonable cost of accommodation and breakfast, provided prior Line Manager approval has been obtained.
- Overnight accommodation should not be booked unless you are required either:
  - to work past **6pm**, or
  - to work the following day at the same location at least **60 miles away** from both your home and your normal place of work (unless otherwise agreed with your Line Manager).
- Where possible, submit a PR form to the Finance team in advance, with all relevant details (e.g. dates, accommodation).
- If accommodation has not been arranged by the Finance team, the employee may pay directly and reclaim the expense with a VAT receipt. Employees should only pay for their own accommodation and must not cover costs for non-GF employees.

Maximum reimbursement limits:

- Accommodation (room only): **£100 per night** (where possible)
- Breakfast (if not included in room rate): **£12**

If suitable accommodation is not available within these limits, employees must obtain prior approval from their Line Manager before booking.

Meals:

- An evening meal up to the value of **£15 plus one soft drink** will be reimbursed for overnight stays, with a VAT receipt. Gratuities and alcoholic or additional drinks will not be reimbursed.
- Lunch is not provided and will not be reimbursed – please make your own arrangements.

Purchase Requests

- Purchases can be requested via a Purchase Request Form.
- Forms must include:
    - a clear description of the item(s),
    - a website link,
    - cost of the item(s)
    - cost of delivery,
    - delivery preference,
    - the requestor's signature and date.
- Completed forms must be sent to your Line Manager for approval; the Line Manager should then forward the request to Finance with confirmation of approval.
- Any request totalling **£1,000 or more** must be authorised by your Cluster Leader.
- Purchases are made by the Finance team. Please allow at least **two weeks** from submission for purchases to be processed.
- All purchases are recorded and tracked against your School's annual spending budget.

Printing

Before creating any new documents for printing, first check whether there are existing official GF documents or leaflets you can use or edit. If none are available and you need to design something from scratch, refer to the GF brand guidelines for support. Once your design is complete, send it to your Line Manager or Cluster Leader for approval. (Please check spelling and grammar carefully before sending for approval)

Our preferred printing supplier is Hello Print. To place an order, complete a PRF as usual, including all necessary details such as format, size, paper type, quantity, and finish. Attach the final item to be printed. Please note that the standard 2-week processing time (starting from LM approval) also applies to printing orders.

Invoice Payments:

To request payment of an invoice, please email Finance with the following details:

- Date and name of event (e.g. *1 September 2026, BHR Day*)
- Supplier name (e.g. *Riverside, Raise, Loudmouth*)
- Price agreed with each supplier (please check include the VAT cost and add to the final cost)

Note: All invoices of **£1,000 or more** must have prior Line Manager approval.