

Grace Foundation Expenses & Purchase Requests Guidance: From September 2023

Claiming back Expenses

- Where an employee makes a purchase for business purposes this may be claimed back through expenses.
- In order to claim back an expense an expense form must be completed and authorised by your line manager.
- Details of the item/s purchased, and the purpose of the purchase must be included on the form. Please make sure you indicate (using the columns provided) the type of expense (e.g., enrichment club resources).
- Please ensure you submit your form within 90 days of the original expense otherwise it will be considered expired.
- Forms must be signed and dated by both the employee and your line manager and sent to financegf@grace-foundation.org.uk
- Proof of purchase is required for all items (excluding mileage) so please ensure you keep your receipts and scan them along with your signed form to Shelley (financegf@grace-foundation.org.uk).
- Please ensure that any personal purchases are paid for as a separate transaction as otherwise your receipt/claim may not be accepted.
- Where claiming for mileage, you should include a full description of the journey on your expense claim form, including business context / who you were meeting / course attended / location of the meeting.
- Please allow two weeks after authorisation & submission of your forms for expenses to be paid. If they haven't been paid by this point, please contact Shelley.
- If you are submitting an expenses form for the first time, please also include your bank sort code and account number on your email as we do not have access to this information from Payroll.
- All expense payments are recorded and tracked against your Academy's annual spending budget.

Drop Down Days & External Guests

- Where an External Guest is attending an Academy for a Drop-Down Day or Workshop (e.g., Values Day, BHR Day, ROPP) and charging Grace Foundation for their time, lunch will not be provided by or reimbursed by Grace Foundation for the guests nor for any Grace Foundation employees.
- If there is no fee/the External Guest is voluntary, lunch up to the value of £5 per head can be purchased for the Guest/s only and reimbursed through expenses.
- Please ensure you communicate this to Guests in advance (so they can bring their own) or make lunch arrangements that will be paid for directly by the School.

Accommodation/Breakfast:



- If you are required to stay away overnight for business purposes GF will pay reasonable cost of such accommodation and breakfast for the following morning, provided you have obtained prior approval from management.
- You should not book overnight accommodation unless you are required to work past 6pm on the night in question, or to work at the same location the following day, at least 75 miles away from both your home and your normal place of work. (Unless prior agreed with line manager).
- Where this can be purchased in advance please send a PR form to Shelley with all relevant details – e.g., dates, accommodation.
- Where accommodation has not been booked in advance by Shelley, the employee should pay the hotel bill and claim the expense back in the normal way. All claims should be accompanied with a VAT receipt. Individuals should only pay for their own accommodation and should not under any circumstances pay for non-GF employees.

The maximum GF will pay for accommodation and breakfast is as follows:

Accommodation (room only rate) £100

Breakfast (if not provided with room) £10

If unable to find suitable accommodation within these limits, the employee should contact their Line Manager for prior approval of a higher amount.

The reasonable cost of an evening meal (up to £15 plus one soft drink) will be paid for by GF whilst you are required to stay away from home overnight. Gratuities and the cost of any additional drinks will not be reimbursed. All claims must be accompanied by a VAT receipt.

Lunch is not provided and will not be reimbursed – please make your own arrangements.

Purchase Requests

- You can request that a purchase is made by submitting a Purchase Request Form. See ***Mileage & Expenses Guidance Documents*** folder.
- Please enter all required information, including specific description of the item being requested and a link to the website.
- All forms must be signed and dated by the requestor and sent to your Line Manager for approval who should then forward to Shelley by email expressing approval.
- If the total amount comes to £1,000+ the authoriser will always be Dave.
- Shelley will purchase and reply to confirm this to your email. Please allow at least 2 weeks for purchase to be made from request being sent.
- All purchase requests are recorded and tracked against your Academy's annual spending budget.

Invoice Payments:

Please email Shelley with the following information: Date & Name of event (e.g., 1st September 23, BHR Day), List of suppliers (e.g., Riverside, Raise, Loudmouth...) & finally the price agreed with each supplier.