



## **Ropley C of E Primary Event Expenditure Policy**

To ensure PTA funds are used responsibly and maximise the benefit to the school community, all event organisers should follow these principles when planning activities and purchases:

### **1. Minimise Expenditure**

Before purchasing any item, organisers should consider whether it can be:

- \* Borrowed from the school, PTA members, or the wider community.
- \* Donated by local businesses, families, or supporters.
- \* Obtained through sponsorship or in-kind support. For those who want it, school can promote businesses and than them publicly on social media/ flags at events etc.

### **2. Sale or Return**

Where possible, items should be sourced on a sale-or-return basis to minimise financial risk and avoid unnecessary waste.

### **3. Use Existing Resources**

Organisers should make reasonable efforts to use existing PTA or school equipment, decorations, and supplies before purchasing new items.

### **4. Spending Approval**

- \* Event budgets should be agreed with the PTA Committee (FROGS) and Headteacher before expenditure is incurred.
- \* Any unbudgeted expenditure over £20 must be pre-approved by the PTA Chairs and Headteacher.
- \* Any single purchase or commitment over £20 must receive prior approval from both the PTA Committee and the Headteacher.

### **5. Value for Money**

Where practical, organisers should obtain at least two quotes for purchases or services over £50 and select the option that offers the best overall value.

### **6. Expense Claims and Reimbursement**

- \* All expenditure must be supported by receipts.



- \* Anyone seeking reimbursement must complete a PTA Expense Claim Form (see below) - and submit together with receipts via email [ropleyfrogs@gmail.com](mailto:ropleyfrogs@gmail.com), to the Treasurer within 30 days of the expense being incurred.
- \* Purchases made without the required prior approval may not be reimbursed.
- \* The Treasurer may request additional information before processing a claim.

## **7. School Partnership**

The Headteacher should be consulted on any expenditure that:

- \* Involves school facilities or resources.
- \* Creates an ongoing cost or maintenance commitment.
- \* May have a reputational, safeguarding, or operational impact on the school.
- \* All posters must be simple in line with school style and standards. Please avoid garish AI generated posters. Only use official school logos.

### **Guiding Principle**

The PTA's aim is to maximise funds raised for pupils by keeping event costs to a minimum and making full use of donations, borrowing opportunities, sponsorship, and community support wherever possible. Every pound saved on event costs is a pound that can be invested in the school and its children.

**FROGS EXPENSE CLAIM FORM**



Send with receipts/return receipts to: [ropleyfrogs@gmail.com](mailto:ropleyfrogs@gmail.com) or FROGS post box in lobby

CLAIMANT NAME

DATE OF CLAIM

EVENT

PRE APPROVAL £20 +

DATE	DESCRIPTION	AMOUNT	RECEIPT	ALLOCATION

**\*TOTAL:**

I confirm that the above information is correct to the best of my knowledge:

Signed: \_\_\_\_\_

**\*If there are excess items, please return them and claim only for what is used.**

**Bank Details for Transfer**

Account Name: \_\_\_\_\_

Account No: \_\_\_\_\_

Sort Code: \_\_\_\_\_

**Treasurer input only:**

Acceptance Signature \_\_\_\_\_

Payment Ref: \_\_\_\_\_

Date paid: \_\_\_\_\_

Additional Info: \_\_\_\_\_

Link to receipts / saved: \_\_\_\_\_