EXPENSE POLICY GUIDANCE

An expense policy explains what your group's money can be spent on, how to submit expenses, and who approves them. This helps the individuals who are submitting expenses by minimising confusion or inconsistency.

We ask all groups to have an expense policy on their page.

Writing your expense policy

Your expense policy could include things like:

- What types of things your group spends money on
- What kinds of expenses you can or cannot accept
- Whether there are minimum or maximum amounts
- What information you need to approve an expense request (e.g. receipts, pre-approval)
- How you can be contacted if someone has questions about this process
- How regularly your group will review and approve expenses
- When approved expenses will be paid out by the Social Change Nest, on Tuesdays and Fridays

It should feel practical, easy to use, and make clear what you tend to spend money on. We've included some examples on the next page, which you can edit to make relevant for your group, or create your own. You can edit your policy at any time if you need to make changes.

*The word limit on the Open Collective platform is 16,000 characters. If yours is longer, we suggest you put it on a public Google Doc and share the link on the platform instead.

Uploading your expense policy

Once you have written your expense policy please upload it to your page by:

- Going to your page's **dashboard** (Make sure you have selected your Collective page dashboard and not your personal profile)
- Scroll down on the left to **Settings > Policies**
- Copy and paste your policy into the text boxes **Invoices expense policy** and **Reimbursement expense** policy
- Scroll down to **press save**

Read the Open Collective instructions for further help and information.

Expense policy examples:

Mutual aid fund

We accept claims for the cost of medications, food, transport to appointments, counselling and anything related to your transition. We also support trans, nonbinary, and intersex (TIN) folk with bills and living expenses. We do not currently accept claims for money for pet expenses.

If you are applying for the first time, please provide the first half of your postcode and a link to one of your social media accounts in the "additional invoice information" box. This is to verify your identity and prevent scammers from taking money from trans people.

Please also let us know how much you need (max. £60 per month) and what you need it for (e.g. bills, food, debt etc etc) in the "additional invoice information" box.

We don't allow reoccurring grants set through open collective, we ask that you don't set your grant to reoccur automatically as it adds strain to our grant team and can create duplicate expenses.

For our full policy, please read the below document for full requirements when submitting for funding. [Insert link to full policy]

Social football club

We will accept expenses for equipment, pitch bookings, event costs, and transport.

Please provide a valid receipt or invoice showing the total amount, date, and what the payment is for.

We will approve in 1-3 days, then The Social Change Nest will release funds the next Tuesday or Friday.

Any issues, please contact any of the admins via this platform, email or WhatsApp.

Youth organising

All individuals and organisations submitting invoices for reimbursement must ensure that expenses are legitimate, business-related, and properly documented. Eligible expenses include staffing salaries, travel expenses (transport, accommodation, meals in line with the company's Travel Policy), office supplies and materials used for client or internal work, subcontractor fees with prior approval, professional services (including legal, marketing, or design support), snacks and refreshments for team meetings or office use, and approved equipment hire.

Invoices must include a unique invoice number, the supplier's name and contact details, our billing information, a clear description of the goods or services provided, dates of service, an itemised breakdown of costs, the total amount due, and supporting receipts. Invoices must be submitted within 30 days of the expense date, via email to [email address]. All invoices will be reviewed within 10 working days, and approved payments will be processed on the next Tuesday or Friday by The Social Change Nest. Expenses that are not reimbursable include alcohol, entertainment, fines, personal purchases, travel upgrades, and any charges lacking appropriate documentation or prior approval. Failure to comply with this policy may result in delays or denial of payment.

Community theatre company

Why do we need an expenses policy?

We need an expenses policy so that our participants and facilitators can feel comfortable in spending their own money on items knowing that they can be reimbursed.

We encourage that participants read this policy before they submit an expenses request via our Open Collective account hosted by The Social Change Nest.

What constitutes an expense?

An expense may refer to a prop, a piece of costume, or materials required for items used during a production, i.e. puppet or set materials.

An expense may also refer to the money needed to guarantee the ongoing functioning of the group, for instance the rent on our rehearsal space, or fees related to venue booking or professional hiring - i.e. a tech hire.

In exceptional cases it may refer to a bus or train ticket, or petrol.

When is it encouraged that a participant or facilitator requests an expense?

An expense should only be requested if it has been confirmed by word of mouth or in writing that it is an acceptable expense by a director. The current directors are [name] or [name].

When is it discouraged that a participant requests an expense?

An expense does not refer to a fee or invoice for professional services rendered. We are run by volunteers, and participants never pay to participate.

More information on expenses

1. An individual submits an expense claim on your page using the appropriate information you've outlined in your expense policy
2. The group's admins receive a notification and can review then approve or reject the expense claim
3. If rejected, they can add a note so the individual can edit or change their claim
4. If approved, SCN receives a notification to pay out the expense
5. All of the steps are visible on the platform so the individual and the group can keep track of the process

Please see our step by step guide on submitting expenses here. To find out more about how to approve an expense on Open Collective, click here.

Each group should have **at least 2 page admins** to ensure there is someone at all times that can approve expenses. Admins cannot approve their own expenses, so this also allows each to approve or reject the other's claim. It is entirely up to the group to nominate which admins can approve expenses. Expenses do not need to be approved by us as your host. Please inform us if there are any changes, or additional admins added to your page.

As the collective admin, your collective role is to approve expenses, and SCN, as your fiscal host, will release the funds once we see they have been approved.

We will process payments on **Tuesday and Friday**. If you have any queries, please email us at hello@thesocialchangenest.org, or call 07712 872277 (10am to 5pm Mon-Fri).

Cash and cheque

We recognise that there may be vulnerable members of the community that need support and are unable to use technology to make contributions in return for the help they receive. It may be that your group spends or receives in cash or cheque - unfortunately this is not possible via Open Collective. If cash or cheque is the only way of paying an expense, please get in touch with us to discuss.