

Business Plan Contest: Social Venture Track Expense Form

Due Friday, April 20, 2012 by 12:00 noon

INSTRUCTIONS: *One form must be completed per team to apply for reimbursement grant funding*

- Complete: Applicant Payment Information, Compliance to Funding Terms, & Expense Information
- Attach original receipts (all expenses must be incurred by April 5, 2012)
- Maximum grant award is \$1,000 per team
- Submit signed hard copy of this form & receipts to Social Enterprise Initiative, Loeb House 3rd floor

Applicant Payment Information

Name (First, Last): _____

Team Name: _____

HBS ID#: _____ SSN or Resident Alien #: _____ Are you a US Citizen: Yes No

Country of Citizenship: _____

If not a US Citizen, please submit the [Foreign National Information Form](#)

Telephone number: _____ Email: _____

Mailing address for check to be sent:

Street City State Zip Code Country

Checks will be mailed late May/early June so **please provide off-campus address** if you will be moving before late June. If your name does not appear on the mailbox, you must include a c/o name or your check may not be delivered.

Permanent legal address (must be non-Harvard address)

Street City State Zip Code Country

If not in your name, please include c/o information: _____

Compliance to Funding Terms

Team member name: _____ Date: _____

Team member signature: _____ HBS Email: _____

By signing above, I certify that these expenses were for educational purposes in support of the development of the business plan submitted for this year's HBS Business Plan Contest.

Payment Authorization (to be completed by SEI Administrator)

Please process a Business Plan Social Venture Track payment to _____

in the amount of: \$ _____ and charge to account: 430-39480-6440-000001-674376-0000-00000.

Please contact Liz Cavano, lcavano@hbs.edu, with any questions.

Approved by _____ Date: _____

Professor Michael J. Roberts

Expense Policy

The Business Plan Contest offers the opportunity for Social Venture Track teams to obtain reimbursement for up to \$1,000 of eligible expenses that were legitimately incurred in the course of preparing the business plan submission. **This reimbursement is available only to HBS MBA students who officially entered the Contest by the December 14, 2011, 12:00 noon deadline.**

Students may be eligible for funding either through the SE Independent Project Reimbursement Grant program or the Rock Center Business Plan Contest Reimbursement Funding program, depending on their project and/or expenses. While students can apply to both programs, they can only accept funding from **one**. For more information, please see <http://www.hbs.edu/socialenterprise/mba-experience/independent-projects/eligibility-and-criteria.html>.

- Eligible expenses incurred AND paid for between August 31, 2011 and **12:00 noon on April 5, 2012** (the date semifinalist plans are due) will be considered for reimbursement. See bullets below for eligible and ineligible expenses.
- An original receipt showing payment or an invoice is required for all items listed in the **Expense Information** section. Invoices MUST include a line showing your payment, including the date of the payment, the method (check, credit card, etc.) and the amount paid. If the invoice does not include this information, that expense will not be accepted for reimbursement.
- **Eligible expenses include:** purchased research reports, telephone calls required for research, photocopying of business plan for submission, hosting services for running a beta version of a web site, software tools required to build a web site or develop other aspects of the product/service.
- Payments to others for services performed (i.e., legal, accounting, etc.) are approved as long as the individuals providing the services are **not** relatives, the services are purchased at fair market value and a receipt for your payment has been issued. Gift cards/certificates to third parties (purchased as survey incentives, e.g.) are reimbursed up to \$25 per person with an overall maximum of \$100.
- **The following expenses are NOT eligible:** travel, meals, entertainment, or hardware or electronic items for team members. Also note that we will not reimburse specifically for color copies of your plan (if it puts you over the \$1000 limit), so we recommend making black and white copies or making sure the extra cost fits into your budget.
- If you elect not to submit an entry, you will still be eligible for reimbursement of up to \$1,000 of legitimate expenses (incurred/paid by the date specified above). However, in order to be eligible, you must still submit a document to the Business Plan Contest. This document may be either a business plan or a substantive report (of equal length and depth of a business plan) that describes your reasons for not pursuing the business opportunity. The philosophy here is that the \$1,000 grant is designed to facilitate the learning process, and we do not want to penalize teams who learned that their idea was not worthy of pursuit. At the same time, we need to see evidence that substantive intellectual work was done.
- Turn in **one reimbursement request form per team** as the check will be cut to one individual only.
- The completed Business Plan Reimbursement Request form plus all related ORIGINAL receipts must be submitted to The Social Enterprise Initiative, Loeb House 3rd Floor by **12:00 noon on Friday, April 20, 2012**. No exceptions will be made for late requests, forms and/or receipts.