

Lloyds Bank and Bank of Scotland Social Entrepreneurs Programme 2018-19

Application questions for Trade Up and Scale Up

Very important: please read

This document is **not** an application form.

You must apply online for this programme (see below). We will not be able to accept hand-written or email applications.

We know applications can feel daunting. So this document shares all the questions you'll be asked when you apply, to help you prepare and so you know what's coming.

We also know you might want to take this to your board, to discuss your application and the commitment that comes with getting a place on the programme.

We look forward to your online application!

How do I apply?

Apply online by 1pm, Thursday 26th April 2018.

- Go to <https://www.the-sse.org/apply-2018>
- Click your first-choice location.
- This will take you to our online application portal.
- You'll be asked to create a log-in (which takes a few seconds). Jot down your log-in details in case you need to save the application and return to it later.
- Complete your online application, saving as you go. It will ask you all the questions below.
- When you've completed all the questions, click "Complete". You'll then see a notice on the web-page thanking you for your application – this means it has been submitted.
- If you have any problems, contact us on applications@sse.org.uk or 0207 089 9120.

Top tips for applying

1. Read the Guidance Notes carefully before starting your online application.
2. We recommend applying early, so we can help you if you have questions.
3. Before you apply online, save documents needed for your application in the format "FirstnameSurnameAccounts.doc", so they are ready to attach.

What the online application will ask

[Everything following will be exactly as it is on your online application]

When you submit your application online, please upload:

1. Your most recent annual accounts, if available (full accounts, not abbreviated; draft accounts are acceptable if final accounts not yet available)
2. Your governing document (e.g. constitution / articles / partnership agreement / rules)
3. Your income and expenditure for the current financial year, and budget for the next year if required
4. Any other documents that are needed to support your application.

You won't be able to upload files that are larger than 5MB. If you're unable to upload them, please email them to applications@sse.org.uk (with an email subject line stating the programme name and your name),

Where we have indicated a maximum word number, this is only an indication. You will not be penalised for writing less or slightly more, as long as it isn't excessive. Brevity and bullet points are welcome!

Feel free to contact us to ask questions at applications@sse.org.uk or 0207 089 9120.

What about Data Protection?

The School for Social Entrepreneurs ("SSE") is committed to protecting your personal information and acting in line with your rights under data protections laws and will treat all data in accordance with our Data Protection Policy.

To process your application, SSE will collect and use personal information provided by you in this form or separately, or which we otherwise lawfully obtain about you. We may use this information to;

- process your application and manage the selection process for this programme,
- conduct due diligence on you and your organisation
- contact you about your application for this programme by phone or email
- If your application is successful, we may also use your information for:
 - managing your participation in the Programme
 - matching you with a mentor
 - sharing and promoting your story and the story of your social enterprise
 - other lawful reasons

We may share your information with our funders and partners, including the Big Lottery Fund and Lloyds Bank plc for reporting and impact measurement of the programme. They will also only use your information for the reasons above.

Further details, including how we share your information and your rights relating to our use of your information, can be found under our Data Protection Notice, a copy of which is available here: <https://www.the-sse.org/your-data>

From time to time we may contact you via email or telephone about programmes or services we think may be of interest to you.

1. If you do not want SSE to use your information to communicate with you, via email and telephone, about courses and services we believe may be of interest to you, you can opt out by ticking this box.

OPT OUT

All questions marked with asterix * are required fields and you will not be able to proceed further, unless you complete these sections. Application will be saving automatically, so before the point of hitting final 'complete' button, you may still amend your answers. After final completion

This is why we listed all questions that you will be asked in the application below.

PLEASE NOTE – we will not be able to accept any hand-written or email applications.

A. APPLICANT:

Details of the person who will attend the interview and the learning programme.

2. * Your full name
3. Your preferred name (if different from the above?)
4. * Your Date of Birth
5. * Your role within the organisation?
6. * Name of your organisation.
7. * Your preferred phone number for contact regarding this application
8. An alternative phone number, if applicable
9. * Email address
10. * Your organisations' address
11. * Town/City
12. * Postcode

We want our programme to be as accessible as possible.

Please let us know if you have a disability, caring responsibilities, or anything else that might affect your ability to attend an interview or to participate in an SSE programme.

Please confirm here if you feel you might require support or adjustment in order to participate would require reasonable adjustments in order to participate please include details below.

13. Please select 'Yes' or 'No'

YES (I May require support)

NO (I do not require support)

14. If selected 'Yes', please specify

B. PREVIOUS APPLICATIONS AND CONNECTIONS

15. * Have you or anyone else from your organisation previously applied for or attended any other SSE programmes? (YES / NO)

16. If 'Yes', please provide details of the programme(s) attended or applied for.

17. * Are you connected (financially or by family) to anyone who is employed by or is a director of SSE or any of its host organisations, or BIG or Lloyds Banking Group (No / Yes)

18. If 'Yes', please provide details

C. ABOUT YOUR ORGANISATION

If your organisation is currently independently registered, please complete Q20-Q26.

If you are running a project hosted by a larger organisation, please skip straight to Q27- Q30.

19. * Please confirm that the organisation that would receive the grant has agreed to your making this application. (I confirm)

20. * Legal structure of the organisation

- Charity
- Community Benefit Society
- Community Interest Company
- Company Limited by Guarantee
- Company Limited by Shares
- Co-operative Society
- Limited Liability Partnership
- Unincorporated Association
- Other

21. If you selected 'Other' or your structure is a combination of two or more of the above, please provide details:

22. If you don't have a legal structure yet, or you are planning to change it, please tell us your plans. You will need to have a legal structure by the start of the programme.

23. Date the organisation was established.

24. Company/CIC registration number (if applicable)

25. Charity number (if any)

26. Other registrations (if any)

27. Is your project hosted by another organisation? (YES / NO)

27. Is your project hosted by another organisation?

If you are running a project hosted by a larger organisation, please provide details of the host organisation below in Q27-Q30.

28. If your organisation or project is hosted or controlled by another organisation, please give details of your host.

29. Host organisation's phone number.

30. Host organisation's address, including postcode:

Please enter any social media accounts for the organisation below

31. Website

32. Facebook

33. Instagram

34. Twitter

1. ABOUT YOU

35. About you - please provide your response to:

** A brief profile of you, including your background, skills and experience, and your current role in the organisation or project.*

If your application is taken forwards this statement will be shared with the assessment panel as your bio.

If you are offered a place on the programme it will form the basis of your profile in the online student community (you will be able to edit it later).

(Max 300 words)

2. YOUR ORGANISATION

About your organisation:

- Give a brief history of your project. How and why was it set up?
- How many staff does it employ? How many volunteers are involved?
- What does the organisation currently do? Please give details of your activities and numbers of beneficiaries for each.

If your project is taken forwards, this statement will be shared with the assessment panel as the summary of your project.

If you are offered a place on the programme, it will form the basis of your profile in the online community (you will be able to edit it later).

36. * About your organisation - please provide your response to the above (Max 500 words)

3. EVIDENCE OF NEED

37. * Tell us about who your organisation is trying to help and the needs you are addressing.

- *Who are the people you are trying to help? Are they from a specific age group, gender, religion, geographical community etc.? What are their needs?*
- *Why are these needs not being met elsewhere? Why is your organisation well placed to meet these needs?*

(Max 300 words)

4. YOUR SOCIAL OR ENVIRONMENTAL IMPACT

38. * What difference has your organisation made so far?

Please provide details, including any statistics, evaluations or quotes, and case studies which demonstrate the impact your organisation has had. Approximate numbers are fine.

You can upload documents with your application to answer this question, if you prefer. Please label attachments clearly. An area to upload documents will be provided at the end of this online form.

(Max 500 words)

39. * Please indicate where the majority of your project work takes place (where the majority of your beneficiaries are based) (dropdown list)

40. * What is your main area of impact? Please select one. (Dropdown list)

41. If you selected 'Other', please specify. (Dropdown list)

42. * Who are your main beneficiaries? Please select one.(dropdown list)

43. If you selected 'Other', please specify.
44. * What is the main industry you are working in? Please select one.
45. If you selected 'Other' , please specify.
46. * Please select the main products/services that your organisation offers
47. If you selected 'Other', please specify

11. THE LEARNING PROGRAMME

48. Why do you want to take part in the learning programme?

- *How will the learning programme make a difference to you and your organisation? What will you be able to do differently as a result of this programme?*
- *How will it affect the impact your organisation makes? What do you expect to get out of the programme? How will you use the training and support on offer?*

** Please provide your response to the above question*

(Max 300 words)

5. YOUR FINANCIAL TRACK RECORD

49. * Please provide the details below or, where applicable, indicate that you will attach separately

At the end of this application you will be asked to upload your organisation's most recent accounts.

Please provide a copy of your organisation's most recent accounts, with your application. If you do not have finalised accounts yet, please provide management accounts for the period going back at least October 2017.

Please provide full accounts, not abbreviated accounts.

If you are running a project that is part of a larger host organisation, please provide a copy of both the host organisation's accounts, and a breakdown of your project's income and expenditure for the last financial year.

Please provide the following details for the last financial year and the current financial year, as far as possible. Attach as a separate file if that is easier, at the end of this submission. If you do not have details for this financial year yet, please provide estimates and indicate this.

Please include:

- *Your organisation's turnover (income) for each year.*
- *A breakdown of income sources for each year, e.g. grants, sales of products, contracts etc.*

- *Net profit or loss.*
- *Net assets (reserves) at the end of the year.*
- *If there is anything unusual in your accounts, including significant debts or unusual entries, it would be useful to explain these (if not explained in the accounts).*
- *Does your organisation have any assets, such as property or intellectual property?*

(Max 300 words)

6. YOUR PLANS FOR GROWTH

50. * Your plans for growth- please provide your response to the question: How do you plan to grow your organisation in the next year? (Max 500 words)

- *What are your plans for growing your organisation between now and the end of the programme period (to September 2019)?*
- *How will you be increasing your trading income? Tell us about new activities, plans to increase sales, develop new products, take on new contracts etc.*
- *How do you know there is a need or demand for this new work? How have you tested the market?*
- *What do you need to do to make these plans a success?*
- *What are three key milestones that you will achieve to help you reach your goals?*

7. YOUR BUDGET

51. * Please either provide the details below or, if applicable, indicate that you will attach separately.(Max 300 words)

- *Please provide details of your organisation' financial plans for 2018/19. Attach as a separate file if that is easier. You will be able to do this at the end of this application.*
- *Please provide your estimated income and expenditure projections through to September 2019, showing anticipated sources of income and anticipated costs.*
- *Please provide any information that will help us to understand how you have calculated your figures and know what your forecasts are based on.*
- *Specifically outline any grants or contracts that you have bid for, or plan to bid for, what these are for and at what stage these are at, and any sales predictions.*

8. THE GRANT

52. * Please read the guidance notes carefully regarding what you can apply for. Please explain below what you would like to use the grant for.(Max 300 words)

Please provide a draft budget of how you would use the (up to) grant on offer.

This is flexible, so if you are not sure yet, that is fine, just give us a rough idea. We understand that your plans may change and will work with you on this, if you are successful in getting a place.

9. ABOUT PRIVATE BENEFIT

Do you:

- Pay any dividends (payments to shareholders)?
- Pay rent to people who are on or have a close connection to anyone on your board or committee?
- Pay anything more than out of pocket expenses for volunteers and voluntary board members?
- Pay salaries to members of the board?
- Pay interest on loans to members of the organisation?
- Make any payments to for profit companies run by any of your board members or senior staff?

53. If so, please provide details. This may be fine, but we may need further information or to add conditions to your grant. Otherwise, please put 'n/a' (Max 200 words)

10. SAFEGUARDING

54. * Do you provide services for children under the age of 18? Do you work with adults who are in a vulnerable situation (e.g. providing counselling, health and care or financial services to adults)?

55. If so, do you have a safeguarding procedure in place and do relevant staff and volunteers have DBS checks that are required by law? Don't send your safeguarding policy now, but we will ask for evidence of this before a grant is paid.

UPLOAD SECTION

Upload the following files below:

- Your most recent signed off Annual Accounts (full, not abbreviated) or draft annual accounts for last financial year if the final ones are not available
- Your governing document
- Your income & expenditure for the current financial year and budget projections for 2018/19
- Any other documents that are needed to support your application

Please note each upload button will allow for one file only- uploading more than one will override previous uploads.

Please save all documents to show your name, to your own device and keep for your own records, for example, "FirstnameSurnameAccounts.doc".

If your files are too big (over 5MB), please email applications@sse.org.uk clearly stating your name and the programme you are applying for.

56. Please upload annual accounts here

57. Please upload your income and expenditure here

58. Please upload your governing document here

59. Any additional document to support application:

60. Any additional document to support application:

61. Any additional document to support application:

EQUAL OPPORTUNITIES SECTION

We ask you for some additional information for equalities monitoring purposes. These details will be separated from your application and will not be seen by those assessing your application. You can choose not to respond to any or all of the following questions. However, it is helpful for our future development and monitoring our reach and impact that you provide this information.

58. By ticking the box below, I agree to the use of my sensitive personal information (including information relating to my gender, race or ethnic origin), in the manner described above and as more fully set out in the Data Protection Policy at Data Protection Policy.

You can withdraw your consent to our use of your sensitive personal information at any time by emailing SSE at office@sse.org.uk or writing to SSE at Data Protection Queries, School for Social Entrepreneurs, 2nd Floor, 139 Tooley Street, London, SE1 2HZ.

62. I agree to use of my sensitive information, as outlined above.

63. Which programme are you applying for?

64. Which school are you applying to attend the programme at?

65. Which of the following best describes how you think of your gender?

- Woman (including Trans woman)
- Man (including Trans man)
- Non-binary
- In another way (how would you describe this?)
- Prefer not to say

66. If you describe your gender in another way, how would you describe this?

67. Is your gender identity the same as you were given at birth?

68. What is your ethnic group? Choose one option that best describes your ethnic group or background

Delivery locations- what proportion of your activities impact beneficiaries in the following areas (please indicate a % against all areas where your project is currently active):

69. England

70. Scotland

71. United Kingdom - Other

72. Channel Islands

73. Do you feel you have lived experience of the social issue or cause your enterprise is trying to address?

74. Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months (including any problems relating to old age)?

75. If you answered 'yes' to the above question, please indicate your disability:

76. If selected 'other impairment', please specify

77. How would you describe your sexual orientation?

78. If you selected 'Other', please specify

79. What is your religion?

80. Do you have caring responsibilities? (Please tick all that apply)

81. Please indicate your highest level of education attainment to date. We collect this information to try and ensure our programmes remain accessible to people from a range of educational backgrounds.

Submission page:

If you have checked your responses and are ready to submit your application, please click the 'Complete' button below!

Press 'Complete' button