

START UP GUIDANCE NOTES



Lloyds Bank and Bank of Scotland Social Entrepreneurs Programme



INTRODUCTION

The Lloyds Bank and Bank of Scotland Social Entrepreneurs Programme is run in partnership with the School for Social Entrepreneurs and jointly funded by Big Lottery Fund.

The programme aims to give social entrepreneurs the best possible chance of success, through access to support and funding. This programme has supported over 1,500 social entrepreneurs in the UK since 2012.

The Start Up Programme

The Lloyds Bank Social Entrepreneurs Start Up Programme will help you to get a new social enterprise up and running. There are 160 places available across eight Start Up locations.

This programme could help you:

- **Learn how to set up and run your organisation:** 12 - 14 learning days, spread over a year.
- **Fund your project** with a £1,000 grant.
- **Get to know other social entrepreneurs**, who'll support your plans and help you through tough times.
- **Be supported** by a one-to-one mentor.

What are these Guidance Notes?

This document explains more about the programme and grant, and how to apply.

Accessibility

If this document is formatted in a way that is not accessible to you, please email applications@sse.org.uk or call us on 0207 089 9120 so we can share an accessible version.

Remember to apply in time!

The deadline for applications is **1pm on Thursday 26th April 2018**.

Apply online at <https://www.the-sse.org/start-up-apply>

We recommend starting your application as early as possible, so we can help you with any questions you have.

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ELIGIBILITY

Can I Apply?

We want to back individuals who are committed to making a social or environmental impact, in a disadvantaged area or with people in need. You must already be leading a project, or have realistic and tested plans and be ready to start. For examples of previous entrepreneurial approaches we have supported, see the case studies on our website:

<https://www.the-sse.org/our-stories/>

If you can answer YES to all the following questions, then you can apply for the Start Up Programme.

About you

- Are you an individual who is leading or setting up a project, which will create social or environmental impact, working in disadvantaged areas or with people in need? (See the FAQs on page 14 if you need more info on this.)
- Are you over 16 years old?
- Do you live in the UK?
- Do you have the right to work in the UK?
- Are you committed to meeting and sharing with others who have been through and are going through the same process?
- Are you committed to attending the learning programme on at least 12 -14 days between October 2018 and October 2019, at one of our locations?

About your project

- Is your project or organisation less than two years old, with income of less than £15,000 per year? OR Is it in the planning stages, but ready to start? (See the FAQs on page 14 if you need more info on this.)
- Is your project's purpose to create a social or environmental impact, in disadvantaged areas or with people in need?
- Have you already taken some steps to put your ideas into action and have you tested your ideas?
- Is your project focused on benefitting communities in the UK? (We are unable to support international projects within this programme.)
- Will your project reinvest the majority of its profits for a social purpose? The majority

of the profits (after you have paid reasonable salaries) must be reinvested in the project or organisation or be put towards furthering a social or environmental purpose.

- If your organisation or project stopped running, would any assets left go to good causes or be distributed for a social purpose, not to individuals or for private gain?
- Will you be able to use a £1,000 grant to support the development of your project between Oct 2018 and Oct 2019?

If your project's annual income is more than £15,000, try [Trade Up](#) or [Scale Up](#).

Please do NOT apply if:

- You only want a grant and do not intend to attend the learning programme.
- You plan to develop a purely commercial business.
- Your project is primarily to provide business development support and advice to other organisations.
- Your project will be undertaking party political activities or will aim to induce people to convert to a religion (proselytising).
- You want to develop projects whose main beneficiaries live outside the UK.
- You only plan to run a one-off event or activity.
- The organisation you are leading has been active for more than two years at the time of the application. (If this applies to you, try [Trade Up](#).)
- You plan to use your grant fund your salary or living costs.
- You are barred from running a company or charity.
- You have an unspent conviction for fraud.
- You are currently declared bankrupt or have a Debt Relief Order.
- Other people from your project are also applying or you think you may send someone else. Only one applicant from each project or organisation can attend the learning programme.

THE PROGRAMME AT A GLANCE

WITNESS SESSIONS

Entrepreneurs share their experiences and discuss the secrets of their success.

You will be able to listen, learn and question them to help you examine and find meaning for your own project.

ACTION LEARNING SETS

You will work in a small group with a trained facilitator, to help you find ways of overcoming the stumbling blocks, dilemmas and other problems that your project faces.

PEER SUPPORT

You will bring your skills and experience to the group and learn from the skills and experience of the other members. This network of like-minded people will provide vital support to enable you to develop your enterprise.

EXPERT SESSIONS

Through questioning, observing and listening to experts, you will improve your abilities in financial management, income generation, business planning, sales and marketing, managing people, partnering and other essential skills.

MENTORING

You will be matched with a mentor, who will help you build your confidence and understanding, and develop yourself and your project.

GRANT

A £1,000 grant will help you get your project off the ground.

What time commitment does the programme require?

Quick info:

- 12-14 learning days, spread over a year
- Four meetings with your mentor, spread over a year

Full info:

The core of the learning programme is 12-14 days (depending on the location). These include at least eight study days spread over a year, plus four days for action learning sets. Here's a video which explains what action learning is: https://youtu.be/IAJ0z_IdZXE

A typical timeline is outlined here, but this may vary slightly from school to school:

Study Days (8 Full Days)	<p>2 days in October 2018</p> <p>2 days in November / December 2018</p> <p>2 days in February 2019</p> <p>1 day in April 2019</p> <p>1 day in September 2019</p>
Action learning sets (4 Full Days)	<p>1 day each in;</p> <p>January 2018, April 2019,</p> <p>June 2018 and September 2019.</p>

In addition, you will need to set aside time to meet with your mentor. You and your mentor schedule your meetings at times to suit you both: generally four sessions, each lasting around 1.5 hours, between November 2018 and October 2019.

There is also a graduation event at the end of the Programme which you will be invited to attend, to celebrate your achievements and your completion of the programme.

You will be invited to join our online community to access information about your programme and your grant, and to connect and share ideas with SSE's community of students and fellows.

The learning programme is only part of the picture though. You will need to be developing your project during the year and will need to have the time and commitment to do this.

Where will the course be held?

Quick info:

You choose one of eight locations in England.

Full info:

The programme will run in eight locations in England. When you apply online, you must choose a location as your first choice. You can also opt for a second choice, if you wish.

If your first choice of location is unsuccessful, you may be considered for your second choice, if spaces are still available.

You must be able to travel to attend training at your chosen schools. You can include reasonable travel costs to attend the training as part of your grant budget.

Please note that it is likely that London will be oversubscribed, so applying to a different location as your first choice may increase your chances of getting a place on the programme.

Region	Location
East of England	Ipswich
London and the South	London Winchester
Midlands	Birmingham
North West	Liverpool
South West	Plymouth Cornwall
Yorkshire & NE	York

THE GRANT

Quick info:

You receive a grant of £1,000, paid in two instalments.

Full info:

As part of this programme, you will receive a grant of £1,000 towards helping you implement your learning. You can use this to help you attend the programme and to help with the costs of developing your project. The grant can be spent on travel costs, running costs, marketing and other things to support the development of your project. You will be required to attend the learning programme to receive the grant. You will need to be able to spend your grant between October 2018 and October 2019.

It is helpful if you can tell us how you might spend your grant, but you can change this later in agreement with us. If you don't know yet, just say you don't know. It won't affect your application.

What you can use the grant for	What we cannot fund
The costs of attending the learning programme, including travel and subsistence	Your salary (including payment to yourself as a sessional worker), living costs or childcare
Project running costs - e.g. office rent, telephone calls, stationery for use directly on your project.	Renting office space in your own house
Events and activities	Academic studies, or those that are not relevant to the development of your project
Marketing and publicity - e.g. developing a website	Costs incurred before the grant is awarded
Salaries for sessional staff	Refurbishment of buildings
Other travel expenses	Any illegal activities
Volunteer expenses	Expenditure outside of the UK without prior agreement.
Insurance	Expenditure outside of the UK without prior agreement.

Criminal records checks
Supplementary training for yourself or others directly relevant to the development of your project
Other items that you can show are relevant to developing your project

Can I buy assets with the grant?

If you want to use the grant to contribute to a piece of equipment or an asset that is worth more than £1,000, such as purchasing a vehicle or building, you will need to talk to your grant manager first. (We will match you with a grant manager from SSE.)

How will my grant be paid?

You must have a UK bank account in your name only when you receive your grant. We cannot pay into joint accounts; though we may be able to pay to an organisation on your behalf (see below).

- Your grant will usually be paid in two instalments at the start and end of the programme year. We will pay £750 at the start of the programme and £250 at the end of the programme, once you have completed all the grant requirements.
- You will need to sign terms and conditions and provide us with all the necessary documents before we release the first payment. You will also need to provide us with some monitoring and financial information so we can release the remaining payments.
- In order to receive the full grant, you will need to attend at least 80% of the learning programme.

We will work with you if you face genuine difficulties in claiming or spending your grant.

Can I nominate an organisation to receive my grant on my behalf?

For various reasons, some people want the grant paid directly to their organisation, or to a

host organisation on their behalf.

If you are accepted on the programme, we will ask you if you want to make this arrangement. We will need to do some checks to make sure that the organisation is willing and able to accept the grant on your behalf and agree terms and conditions with that organisation.

“I came to the School for Social Entrepreneurs pretty much as a as a blank canvas and now feel like an emerging picture equipped with the tools to succeed and progress. It’s really empowering.”

**Rachael Pearson, Autism Isolation No More,
Start Up student**



HOW DO I APPLY?

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

Top tip: We recommend applying early, so we can help you if you have questions or problems. (We will be very busy in the week before the deadline.)

- Go to <https://www.the-sse.org/start-up-apply>
- 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.
- 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 tip: If you want to include a governing document, your accounts or any additional documents in your application (these are all optional), save them in the format "FirstnameSurnameAccounts.doc" so they are ready to attach.

Don't miss the deadline! Please don't submit your application past 1pm on 26th April 2018 without prior approval, as it will not be considered. Under exceptional circumstances, we may grant approval to submit your application late. You need to call programme manager Marta Zukowska on 0207 089 9120 to discuss this, ahead of the deadline.

HOW WILL MY APPLICATION BE ASSESSED?

INFO SESSION AND INTERVIEW (MAY AND JUNE)

If accepted to the next stage, you will be required to attend an information session of up to three hours at your chosen location, and an interview.

If you are successful, the school you have applied for will inform you of exact dates.

OFFER TO JOIN THE PROGRAMME (AUGUST)

You will be asked to accept terms and conditions for the grant and provide necessary documentation, including criminal records checks where appropriate.

WE ASSESS YOUR ONLINE APPLICATION

Once we have received your application, we will check that you meet the basic eligibility criteria and that your application is complete. Incomplete applications will be rejected.

Your application will then be assessed by the SSE team at your first-choice location, and then at your second-choice location (if there are places remaining). We may call to speak with you prior to being invited to an information session, to clarify any issues.

You will find out by June whether your application will be taken to the next stage.

SELECTION PANELS JUNE/JULY

Following interviews, we will draw up a shortlist. Shortlisted applicants will be invited to present their ideas to a selection panel, including representatives from our funders. If successful, you will receive a provisional offer of a place on the learning programme.

THE PROGRAMME BEGINS! (OCTOBER)

The learning programme starts in October 2018 and runs until October 2019.

*At interview stage, you may need to provide your proof of identity and right to work.

FAQs

What do we mean by “social or environmental impact in disadvantaged areas or with people in need”?

We are looking for projects that improve the lives of disadvantaged people or communities either through social or environmental benefits. You should be targeting your services to work with people in need.

We will not consider arts, heritage or animal projects unless they show that they are focused on improving the lives of disadvantaged people or communities.

What do we mean by “in planning stages, but ready to start”?

You may not have started your project yet, but we want to know that you have been working on the planning and that the project is ready to start. We want to know why you think your project will work and how you know you can deliver it. We don't expect all projects to be successful and we are happy to take a risk with you, but we want to know that there is a good chance of your project succeeding. You need to show us how you have tested your ideas and know your plans have a realistic chance of success.

We would expect that you can respond to some or all of the questions below:

- Have you had direct experience of the issues or of similar projects?
- Have you found out who else is running the kind of project you are proposing? Why will your project be different or additional to theirs?
- Have you talked to people about whether your project is seeking to help their needs, and about your ideas?
- Have you talked to experts in the field or people who have run similar projects?
- Have you started running activities or run a pilot project?

What do we mean by “an annual income of less than £15,000”?

If you had income of less than £15,000 in the last 12 months, from grants, sales or contracts that is fine.

If you have recently received a larger grant or contract, which has come in already but is for work to be completed over the coming year, then you may still be eligible. Contact us for advice.

What if I have particular needs which may prevent me from fully taking part in the learning programme?

If you have any particular needs or there are any barriers which may prevent you from taking part in the programme, please contact us to discuss on applications@sse.org.uk or 0207 089 9120. We are keen to enable people with disabilities and with other specific needs to access our programmes. If you need help with completing the application form, or attending the interview, let us know.

There is a separate small fund held by the SSE to enable students who have particular needs to access the programme. This will be negotiated individually with participants. If you do have specific needs and are concerned about this, please contact us to discuss.

What happens if my project will work with children, or adults in vulnerable situations?

If your project will be working with children under 18 years old or adults in vulnerable situations, you may need criminal records checks for staff and volunteers. Vulnerable situations includes health or personal care, assistance with finances or shopping because of age, illness or disability, transport to day centres, or other types of social work or therapeutic support.

The SSE can provide you with advice on this when you are setting up your project. You will be required to show that;

- You have an up-to-date criminal records disclosure. We can advise you on how to get this.
- Once you start providing services, you are following good practice on safeguarding, including getting enhanced checks for people who require them.

What about other requirements?

- You must ensure that health and safety standards are met to protect yourselves and others involved in your activities.
- You must have any insurance (e.g. public liability Insurance, employer's liability insurance, equipment insurance etc.) that is required for your activities.
- You must also ensure that you have any approvals, permissions, licenses or carry out any criminal record checks required by law.
- If you are providing therapeutic counselling services, you must be able to demonstrate that you are properly trained and supervised, e.g. through membership of an appropriate body. If you haven't got this already, we may make it a condition of your grant.
- You will also be required to put Equal Opportunities procedures in place once your project has started. We can advise you about this.
- You will be able to put your grant towards these costs.

Can I apply if my project is hosted by a larger organisation?

You don't need to have established a formal organisation, but if you have, it will have been set up for less than two years at the time of application. Your project may be hosted by a larger and older organisation. If so, it will have to have a degree of independence within that organisation. However, we do not normally accept franchises or organisations that are controlled by a local authority.

Can I apply if I have a full-time job?

You can apply to the programme if you are in full-time employment as long as you are able to manage your project and attend the learning programme in a way that fits in with your employment commitments. We would also expect you to have time to develop your project during the year, outside of the learning programme.

Can I apply for this programme if I have criminal convictions?

Previous SSE fellows have included people who have criminal convictions, some of whom have used their experience in prisons to make a difference to the lives of ex-offenders. You do not need to let us know about previous convictions unless they are relevant to your application.

If you have unspent convictions for fraud or any convictions which may affect your ability to run your project, including working with children, young people or adults who are vulnerable, you should let us know, as we may undertake checks during the course of the application assessment.

Can I apply if I already have been on an SSE programme?

If you have only been on short courses with SSE, then yes. If you have been on an SSE Fellowship Programme before, we would expect you to have already started your project, so the Start Up Programme will not be relevant. The Trade Up or Scale Up Programme, for more established projects, might be of more interest to you (details are available [on our website](#)). If there were exceptional circumstances as to why you did not complete the previous SSE programme, we may consider your application - please discuss this with us first.

If you are currently on any SSE programme that's longer than six months, you cannot apply for this programme. This includes any level of the Lloyds Bank and Bank of Scotland Social Entrepreneurs Programme, Community Business Trade Up 2018, the Fellowship Programme, Arts Council England and other long programmes run across the country.

Can I apply if unsuccessful in the past?

If you or someone else from your organisation or project has applied before and not been successful, you are welcome to apply again. We often have people on our programme who are applying for the second or third time, and whose ideas or plans have developed since they first applied. However, we would suggest that you check the feedback you received in the past. If in doubt, you can contact us.

Can more than one person from our project apply?

We will only assess applications from one person from your project or organisation. Please decide who you would like to attend the programme and they should be the one to apply. Because of the way the learning programme works and how the trust within the group is built, it is important that it is the applicant who attends all the sessions. In general, we will not allow others from your project to attend the programme.

Can I apply if I am connected to the School for Social Entrepreneurs, or to any of the funders of this programme?

We cannot accept applications from people who are staff or trustees of SSE. If you have a close connection with SSE, its host organisations, staff, trustees or the funders of this programme, please contact us before making an application.

Can I apply if I am supporting other businesses including social enterprises?

We do not usually accept applicants whose main work is providing training or business support services primarily to other businesses, including social enterprises or charities. This would include training, fundraising or management support. However, we sometimes consider applications where the services provided are mainly back-office support services, such as HR, accountancy or office space, or where training is provided for people who are unemployed in order to help them access employment. If in doubt, please contact us.

Can I apply if my project is a franchise?

We do not usually accept applications from projects that are franchises of another project. We expect that you would receive the support you need to set up from the parent organisation.

Can I apply if my project is controlled by a public sector organisation?

We accept applications from projects which are public sector roll-outs, or set up with the support of local authorities, as long as they are now fully independent. However, we do not usually accept applications from projects or organisations that are controlled by a public-sector organisation. If in doubt, please contact us.

What about Data Protection?

The School for Social Entrepreneurs is committed to protecting your personal information and acting in line with your rights under data protection laws and will treat all data in accordance with our Data Protection Policy here: <https://www.the-sse.org/your-data>

SSE will collect and use personal information provided by you in your online application or

separately, or which we otherwise lawfully obtain about you. We may use this information for:

- processing your application and managing the selection process for the programme
- conducting due diligence on you and your organisation as part of that process

This includes contacting you about the workshop or programme which you are applying for by phone or email.

If your application is successful, we may also use your information for:

- managing your participation in the programme
- managing your grant claims and payments
- matching you with a mentor
- monitoring your progress and the impact of the programme
- 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 and other programme funders for monitoring and reporting purposes. They will also only use your information for the reasons outlined 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>.

We ask you to provide your Equal Opportunities details. You are not required to give these and you can select the 'Opt Out' box. However, it is helpful for our future development and marketing that you provide this information. It can also help us to identify ways in which we can provide specific support to those who need it, for example applicants who may require additional support to attend interviews or participate fully in the programme.

For further information

If you need any advice on your application, please contact us on 0207 089 9120 or by email at applications@sse.org.uk.

For more information please go to our website (<http://www.the-sse.org/lbsep/>) and the specific programme page (<https://www.the-sse.org/courses/lloyds-bank-and-bank-of-scotland-social-entrepreneurs-start-up-programme-2018/>).

Complaints

If you wish to make a complaint about any aspect the programme, please see our Complaints Procedure: <https://www.the-sse.org/complaints/>

