Heritage Trade Up Application 2021

The Heritage Trade Up Programme is supported by the National Heritage Lottery Fund

The closing deadline for applications is 1pm on Friday, 9th April, 2021

**Section A: Applicant details**

**Name (first)**

**Name (last)**

**What is your preferred name, if different from the above?**

**Name of your organisation**

**Your role in the organisation**

**Email**

**Your organisation's address (street address)**

**Your organisation's address (street address line 2)**

**Your organisation's address (city)**

**Your organisation's address (county)**

**Your organisation's address (postal / zip code)**

**Your organisation's address (country)**

**Your preferred phone number for contact regarding this application**

**Mobile number (if different from above)**

**Your date of birth (we need this for ID check purposes only)**

**Website of your project (if you have one)**

**Facebook page for your project (if you have one)**

**Instagram account of your project (if you have one)**

**Twitter handle of your project (if you have one)**

**We want our programme to be as accessible as possible. If you feel you would require reasonable adjustments in order to attend the interview or to participate in an SSE programme due to a disability, caring responsibilities or any other reason, please give details below or contact us by phone or email to discuss further.**

**Section B: Basic Eligibility**

**(the below are Yes/No options)**

**I am a resident and eligible to work in the UK**

**I confirm that any grant funding I receive via the programme will be sent on supporting the development of my organisation in the UK**

**My organisation will reinvest the majority of any surplus into the organisation for a social or environmental purpose.**

**If my organisation winds up or closes, any remaining money or assets will be redistributed for social or environmental purposes – not to individuals.**

**If my project is working with children or vulnerable adults, I understand that I will need to provide an up to date criminal records disclosure before a grant is released.**

**You must be able to answer ‘No’ to the following questions:**

* **Are you currently declared bankrupt, or under a Debt Relief Order**
* **Are you barred from acting as a company director or charity trustee?**
* **Do you have an unspent conviction for fraud?**

**Section C: Connection to SSE:**

**Have you or anyone else from your project previously applied to the School for Social Entrepreneurs?**

**Please provide details of the programme(s) attended or applied for**

**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 National Heritage Lottery Fund? If ‘yes’ please give details**

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

**Section D: Your organisation’s details:**

**Please specify the region of the UK that your organisation covers or is based in:**

* England
* Scotland
* Wales
* Republic of Ireland
* Northern Ireland
* Channel Islands

**Please specify the region you are/will be based in**

**Which thematic area does your organisation most closely align with?**

* **Community Services**
* **Education**
* **Food & drink**
* **Health & social care**
* **Heritage**
* **Homes & gardens**
* **Leisure**
* **Media**
* **Retail**
* **Sport**
* **Technology**
* **Transport**
* **Visual & performing arts**
* **Other (please provide further information below)**

**Which of the following impact areas does your organisation most closely align with?**

* **Access to services**
* **Community cohesion**
* **Community pride & empowerment**
* **Education and learning**
* **Employment and training**
* **Environment**
* **Health and wellbeing**
* **Housing and homelessness**
* **Infrastructure support**
* **Local environment**
* **Poverty and low incomes**
* **Social-isolation**
* **Other (please give details)**

**Who are your main beneficiaries and/or audiences?**

* **A geographical community**
* **Black and minority ethnic (BAME) communities**
* **Families**
* **The general public**
* **Homeless or vulnerably housed people**
* **LGBTQ+ people**
* **Migrants, refugees or asylum seekers**
* **Older people**
* **Other social enterprises, charities, or heritage sector organisations**
* **People experiencing mental health problems**
* **People facing poverty/financially excluded**
* **People with disabilities or a long term illness**
* **People with drug, alcohol or other addictions**
* **Prisoners or people with convictions**
* **Women and girls**
* **Young people**
* **Other (please give details)**

**Legal Structure? (E.g. Unincorporated Association, Trust, Company Ltd by Guarantee, CIC etc.):**

* **Charitable Incorporated Organisation**
* **Charity**
* **Community Benefit Society**
* **Community Interest Company**
* **Community Interest Company Limited by Guarantee**
* **Community Interest Company Limited by Shares**
* **Company Limited by Guarantee**
* **Company Limited by Shares**
* **Co-operative Society**
* **Limited Company**
* **Limited Liability Partnership**
* **Limited Partnership**
* **Other**
* **Partnership**
* **Sole Trader**
* **Trust**
* **Unincorporated Association**

**Company/CIC registration number (if applicable):**

**Charity number (if applicable)**

**Other registrations:**

**Date Established:**

**What are the main planned services or products of your project? It’s okay if you don’t know yet, please choose the most likely**

* **Cafe**
* **Clothing**
* **Mobile/web app**
* **Workshops**
* **Wellbeing services**
* **Venue hire**
* **Advocacy work**
* **Apparel & clothing**
* **Arts & crafts - activities**
* **Arts & crafts - products**
* **Books & educational products**
* **Community venue or other space**
* **Construction, plumbing & electrical**
* **Consultancy**
* **Design - digital design services**
* **Design - graphic or illustration services**
* **Education & training**
* **Electronics**
* **Equipment hire**
* **Events - products**
* **Events - services**
* **Food & drink - cafe, restaurant or pub**
* **Food & drink - catering or hospitality services**
* **Food & drink - mobile vendor**
* **Food & drink - retailer**
* **Healthcare, mental health & wellbeing - services**
* **Healthcare, mental health & wellbeing - products**
* **Home & garden - products**
* **Home & garden - services**
* **Music products**
* **Performance**
* **Photography**
* **Printing or merchandising**
* **Recreational activities**
* **Repairs & up-cycling**
* **Social club or support group**
* **Sports & physical activities**
* **Sports equipment / venue**
* **Tech - software/app development**
* **Tech - support services**
* **Transportation**
* **Video production / editing**

**Do you provide services for children under the age of 18 or do you work with adults who are in a vulnerable situation (e.g. providing counselling, health and care or financial services to adults)?** *If yes, please upload your Safeguarding Policy at the end of this application form.*

**Section E: About you**

**Tell us about yourself - including your background, skills and experience (max. 300 words)**

**Do you feel you have personal experience of the issue your organisation works on? E.g., if your organisation represents a particular cultural heritage, do you share this background? Or if your organisation is trying to address a social issue, do you have experience of this issue? If this is not relevant to your organisation, please select ‘no’**

**Section D: Your organisation**

**Which heritage theme or sub-sector does your organisation work within ?**

**Tell us about your organisation (max 300 words)**

* Please give a brief history of your organisation. How and why was it set up?
* Does your organisation aim to achieve social and/or environmental impact, and what does this look like?
* What are its main activities?

**Who are the key audiences/beneficiaries and how many people do you reach annually? Please estimate figures if not available. (max 50 words)**

**How many paid staff does your organisation employ? Who else is involved, e.g. as volunteers or committee members? (max 50 words)**

**Please tell us about the makeup of your senior management team and Board. If available, please provide data on the percentage of senior leadership and board members who:  
- are women  
- are from Black, Asian or minoritised ethnic communities  
- are from the LGBTQ+ community  
- consider themselves to have a disability  
- represent the community where you operate (if applicable)**

**What positive changes or impact has your organisation achieved so far**? **(max 200 words)**

* If you have any statistics, evaluations or quotes, and case studies which demonstrate the impact your organisation has had, please tell us about them here or upload supporting documents at the end.

**Section G: Your financial track record**

**Please provide the following details for the last financial year and the current financial year, as far as possible.  If you do not have details for this financial year yet, please provide estimates and indicate this.  
  
*(If it is easier, you can attach this information as a separate file at the end of the application form. Please clearly label the financial year each document relates to.)*  
  
Please include:  
- Your turnover (income) and expenditure 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?**

**Section G: Your plans for growth**

**What are your plans for establishing a new trading activity?** *Please include**plans for increasing your trading income such as new activities, plans to increase sales, develop new products, take on new contracts, etc. (max 200 words)*

**What have you done and what do you need to do to make your plans for growth a success***? For example how have you tested the market? How have you identified if there a need or demand for any new work/services/activities? What are three key milestones that you will achieve over the next year to help you reach your goals? (max 200 words)*

**Projected income**

Please provide your estimated income and expenditure for the next year (max 200 words).

* Please outline how you have calculated these projections. For example, is the income based on estimated sales, grants, or contracts you have secured, plan to bid for or apply for? Provide us with any information that will help us understand how you have calculated your figures.
* 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.
* You may wish to upload supporting documents at the end of this application form.

**Section I: The learning programme**

**Why do you want to take part in the Heritage Trade Up programme? (max 200 words)**

* How will the learning programme make a difference to you and your organisation?
* What do you hope to be able to do differently as a result of this programme?
* What do you expect to get out of the programme?

**Section J: The grant**

* Please read the application information guide carefully regarding what you can use the grant for.
* **How do you plan to use your grant? (max 200 words*)*** *You may change this later if necessary, but it helps to understand your current plans. Please include an indication of how your grant utilisation will support more people to be involved with heritage.*

**Section K: About private benefit**

Does your organisation**…**

* 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?"

If yes, please provide details. This may be fine, but we may need further information or to add conditions to your grant. (max. 200 words)

**Section L: Other information**

**Is there anything else you wish to add as part of your overall application? (max 100 words)**

**Section M: Uploads**

**Please provide a copy of your organisation’s most recent annual.** *These should be 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 name the file in the format ‘FirstnameSurnameAccounts.doc’

**Please upload your governing document.**

Please name the file in the format ‘FirstnameSurnameGoverningDoc'

**Please upload your income & expenditure for the last financial year and current financial year, if applicable.**

Please name the file in the format ‘FirstnameSurnameIncome&Expenditure;

**Please upload your income projections, if applicable.**

Please name the file in the format ‘FirstnameSurnameIncomeProjections.doc’

**Please upload your safeguarding policy, if applicable.**

Please name the file in the format ‘FirstnameSurnameSafeguardingPolicy.doc’

**If you wish to provide any additional documentation, please upload it here.**

Use the name formatting as above

**Where did you hear about this programme? Please select one.**

* SSE – event or in person
* SSE – newsletter or email
* SSE – social media
* SSE – website or blog
* Lloyds Bank or Bank of Scotland Communications
* Lloyds Bank Foundation for Channel Islands
* Halifax Foundation for Northern Ireland
* From another organisation
* Someone I know has done the programme
* Word of mouth
* Other Social media
* Facebook
* Linked in
* Media – print
* Media – radio
* Media TV
* My local MP
* Flyer
* Other (please specify)