

Community Business Trade Up 2023

Application Form

The **Community Business Trade Up 2023** will run in partnership with the School for Social Entrepreneurs (SSE) and funded by **Power to Change and the Dulverton Trust**.

We know you may not have everything in place yet. Please try to answer all the questions as fully as possible. If you don't know something, please say this or write "N/A" rather than leaving blank.

Feel free to contact us to ask questions at eric.vintner@sse.org.uk

This form should be completed in the name of the lead applicant, who will be the person who will attend the interview and the programme.

Support with completing your application form:

- **Guidance:** Please carefully read the Application Guidance.
- **Questions:** See the questions and draft your responses. This downloadable set of application questions, with guidance provides space for you to plan your answers and share these with others in your organisation. You will then need to copy your answers to this online form.
- **Webinars:** To find out more about the programme, help you understand the criteria and how to apply, you will be able to book onto webinars. We will share information of those events via our website page. If you book and can't attend, we can send you a recording.
- **Helpdesk:** Ask questions and get advice on completing your application at eric.vintner@sse.org.uk or 017 2621 6101
- **One-to-one support:** If you have difficulty filling in forms because of dyslexia, language or disability, or need one-to-one advice about applying, we have a limited number of one-to-one sessions available. Please contact the helpdesk if you need to access these.

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
- sharing and promoting your story and the story of your community business
- other lawful reasons

We may share your information with our funders and partners. 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>

In proceeding with your application you agree to us processing your application in accordance with our data protection policy.

We want our programme to be as accessible as possible.

If you feel you would require reasonable adjustments prior or in order 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.

You can save your application to return to later. Please save the URL link provided when you click save for later.

- **Important:** The form has an auto-refresh after 24 minutes and any unsaved data will be lost. Please press 'save for later' at the bottom of each page regularly to ensure your form saves. Once you have filled in your email address below and pressed 'save for later' you will receive a URL to save.

A: Your details

A1. Name

A2. What is your preferred name, if different from the above?

A3. What are your preferred pronouns?

A4. What is the name of your organisation?

A5. What is your role in your organisation?

A6. Email address

A7. Your mobile phone number (or other phone number if no mobile)

A8. Your year of birth – We need this for ID check purposes only.

A9. Please confirm you will be the lead participant and will commit to attending at least 80% of the learning programme

A10. Please confirm that you are at least the age of 16 and resident and eligible to work in the UK

A11. Have you or anyone else in your organisation previously applied to SSE, Power to Change, or The Dulverton Trust?

If so, please provide details

A12. Do you work for or are you connected (financially or by family) to anyone who is employed by or is a board member of SSE, Power to Change, or The Dulverton Trust?

If so, please provide details

A13. How did you hear about this programme?

Please specify

A14. For in-person sessions, in which region would you prefer to attend?

B: Your organisation

B1. Have you already established an organisation, e.g adopted a constitution or registered a company or charity?

Is your project hosted by or part of a larger organisation?

If so, please provide details

B2. What is the full legal name of your organisation?

B3. Any other names that your organisation uses?

B4. Please provide the address for your organisation

B5. What is the legal structure of your organisation?

If other or N/A please provide details

B6. What date was your organisation registered?

B6a. If your organisation is older than 5 years, but you believe it is still in its early stages, please explain.

B7. Charity number (if applicable)

Company number (if applicable)

FCA number (if applicable)

B8. Please confirm that your organisation or project is based in the England and that most of your beneficiaries are based in the England.

B9. Please provide your organisation or project's details, web and social media accounts

Phone number

Email address

Website (if applicable)

Twitter (if applicable)

Instagram (if applicable)

Facebook (if applicable)

B10. Does your organisation work with children, young people or adults in a vulnerable situation? If yes, please attach a copy of your Safeguarding Policy, if you have one.

Questions B11-B15 are included to help us understand more about your business and what kind of support you might need on the programme. They will not be used for assessment purposes.

B11. Does your organisation have an Equalities and Diversity Policy or equivalent?

B12. Does your organisation have a Health & Safety Policy in place?

B13. Does your organisation have a Privacy Policy covering GDPR in place?

B14. Does your organisation have a Policy covering fraud, anti-money laundering and anti-bribery?

B15. Does the organisation have a Conflicts of Interest Policy in place?

C: More about your organisation

C1. Where you work: Please provide up to three postcodes of where your project activities are mainly based. This might be the same as your address or a different postcode where your activities take place.

This might be the same as your address or a different postcode where your activities mainly take place.

C2. What region is your organization based in?

C3. What is the main impact area of your organisation?

C4. What is the secondary impact area of your organisation?

If other, please describe

C5. Main activities: What is the main activity of your community business? Please select one.

If other, please describe

C6. Social or charitable purpose: Choose the option that best describes your social or charitable purpose.

You must have a social or charitable purpose, but you don't have to be a charity to apply.

C7. Board members/Leadership: How many people are involved in leading your organisation, including committee members, board members, steering group, or other key staff and volunteers.

C8. Staff: Approximately how many people are paid to work for your organisation (if any)?

We just need a number, you don't have to work out full time equivalent numbers

C9. Volunteers: Approximately how many volunteers are involved in your organisation?

A broad idea is fine. Include board members who actively volunteer

C10. Beneficiaries: Approximately how many people have benefitted from your activities in the last year?

A broad idea is fine, you don't need to count them!

D: Your Finances

D1. Last year: Income in the last financial year: What was your organisation's income in your last financial year (if any)?

D2. Last year: Expenditure in the last year: What was your organisation's expenditure in your last financial year (if any)?

D3. Last year: Tell us a bit more about your last financial year. Please tell us about: Your income: Tell us a bit about where this has come from - eg grants, sales, contracts etc. Anything else that would help us to understand your finances.

You can upload a separate document if that is easier.

D4. This year: What is your organisation's income likely to be this year?

D5. This year: What is your organisation's expenditure likely to be this year?

D6. This financial year: Please tell us about your current financial year. Please tell us about: Your income: Tell us a bit about where this has come from - eg grants, sales, contracts etc. . Anything else that would help us to understand your finances.

You can upload a separate document if that is easier.

D7. Your financial plans: Please tell us briefly about your financial plans for the next year. Please tell us about: What income do you think you will bring in next year. Where will this come from? How much grant income and sales income are you aiming for? Is any of this secured already?

You can upload a separate document if that is easier.

D8. Private benefit: Say yes if any of the following are true: Do you:

*Pay dividends (payments to shareholders)?

*Pay rent to people who are on your board or have a close connection to the organisation?

*Pay salaries above the market rent?

*Pay interest on loans to members of the organisation or board members?

*Pay companies or business that are linked to board members?

D8a. Please tell us more about this

E: Tell us more about your work and your plans

Here is where you can tell us about yourself, your organisation and why you want to take part in the programme.

You have the choice to answer the following questions either:

a) In writing, below

b) In a voice recording, no more than 1 minute per question*

*If you are sending in a voice recording, you can either upload it below or email it to eric.vintner@sse.org.uk (we recommend sending via WeTransfer). Title your email "**CBTU 7 application**" and include your name and contact details.

Please ensure that the questions are covered in whichever format you choose. All formats are weighted equally, and the different options are simply provided to ensure that you are as comfortable and confident as possible with the application process.

Do you wish to complete this section using a voice recording?

E1. Do you have lived experience of the issue that your organisation addresses?

E2. Summary: Provide a brief description of your organisation or project. Where is it, what does it do, what activities or services does it provide?

E3. Locally rooted: A community business is locally rooted. It is based or working in a locally defined area or place within the community. It build links within a defined geographical area (e.g. a ward or constituency in a local authority). Tell us a little bit about your community, how your organisation started and how it serves this community's needs.

Hint: You can use bullet points to highlight how you work in the local geographical area.

E4. Broad community impact: A community business has broad community impact across the local community through different services and activities, or by ensuring that it includes groups which may be excluded from participation, in the absence of dedicated effort. Describe how your organisation benefits and supports a broad range of members of the local community.

Hint: How do you know if your community business is having an impact? Your organisation's impact might be captured in an annual report, an evaluation or an annual survey with people who use your services. Summarise findings from some of these sources.

E5. Trading: A community business generates income through trading, often benefiting the community through its trading activity. Additionally, profits are reinvested to benefit the community. Examples of this are sales through an onsite cafe, hiring rooms, selling services or products. Describe how your organisation generates income through trading, from goods

or services, or a combination of both. Estimate what proportion of your organisation's total income is generated through trading. If you generate a surplus or profit, explain what it is used for.

E6. Local accountability: A community business is accountable to its local community. It can demonstrate that the local community is involved in planning and supporting the community business, over and above using services. Examples of this are an open membership structure or evidence of how local people get involved to shape projects and influence how the organisation runs – perhaps by contributing to working groups or the board. Describe how your organisation is accountable to the local community.

Hint: Use bullet points to give examples of how you involve the local community in decisions about how the organisation operates, perhaps through local board members, volunteers and staff. Your social media reach may highlight how your relationships with the local community have influenced decision making.

E7. The learning programme: Why do you want to take part in this learning programme? How will this learning programme make a difference to you and to your organisation?

E8. The grant: How will the grant of up to support your learning and grow your business in the next year? Hint: See the guidance for information about how the grant can be spent

F: Monitoring

F1. Roughly what proportion of your beneficiaries....

...are people from minoritized ethnicities?

...are people with disabilities?

...identify as LGBTQIA+?

...are younger people (35 or under)?

...are older people (60 and over)?

...are people who are economically or educationally disadvantaged?

...are people with experience of long-term unemployment?

...are people with experience of homelessness?

...are women and girls?

...are ex-offenders?

...have refugee status or have experience of migrancy?

F2. Your leadership: Tell us about the make up of your board and senior leadership as a group, if you know. You don't have to identify individuals.

Our organisation is led by people who

...live in our local area?

...are people from minoritized ethnicities?

...are disabled?

...are women and girls?

...identify as LGBTQIA+?

G: And finally...

G1. Is there any thing else you would like to tell us?

G2. Uploads

Unincorporated organisations only - Provide a copy of your constitution (we can access this information online if you are registered with Companies House, FCA or Charity Commission)

Provide a copy of your most recent statutory accounts (if available) These should be full accounts including income and expenditure/profit and loss - not abbreviated or fillets accounts

Information about your current financial year (if not answered on form or previously uploaded)

Information about your next financial year (if not answered on form or previously uploaded)

A case study or your social impact report (optional)

Your Safeguarding Policy (if required and not previously uploaded)

If submitting a voice recording(s) for Section E, please upload them here if you have not already uploaded them

Any additional information you want to share

G3. Authorisation: I confirm that the board has authorised me to agree provide these details and to submit this application.