Do not fill in this form…..Do not fill in this form…….Do not fill in this form

Lloyds Bank and Bank of Scotland Social Entrepreneurs Programme 2020-2021
Trade Up Application Form

The closing deadline for applications is Thursday 30th April at 1pm.

Very important: please read

Please read the application guidance notes before completing the online application form. This document is not an application form. Only online applications will be accepted.

We know applications can feel daunting so this section lists all the questions you'll be asked in the online application and the documents you may need to upload to help you prepare so you know what's coming.

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 on LBSEP2020@sse.org.uk or 0207 089 9120 if you have read the guidance notes but are unsure about suitability for the programme.

All the best,

The SSE Team

Accessibility

If the online application is formatted in a way that is not accessible to you please contact us at LBSEP2020@sse.org.uk or 0207 089 9120

We recognise that discrimination of all sorts infiltrate every part of our society, and we are working hard to counter that wherever we find it. To that end, we actively encourage applications from people of all faiths, races, gender identities, sexual orientations, economic circumstances and backgrounds, as well as those from disabled communities. No educational qualifications are needed to join our programmes.

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 Lloyds Banking Group, the National Lottery Community Fund, 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

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

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 (link) to save. You will also receive a copy by email (please check your junk mail if you don't receive it).

We want our programmes to be as accessible as possible.
If you require reasonable adjustments in order to take part in an interview or to participate in the programme due to a disability, caring responsibilities or any other reason, you will be able to provide details in the application form or contact us by phone or email to discuss further.

Section A: Applicant details

Name (first)

Name (last)

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

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

Name of your organisation

Your role in the organisation

Your preferred phone number for contact regarding this application

Mobile number (if different from above)

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)

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)

The programme will be delivered throughout the UK. Please choose your preferred location.

Section B: Previous SSE applications and other connections

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 Lottery Community Fund or Lloyds Banking Group? If 'yes' please give details

Please confirm that the organisation that would receive the grant has agreed to your making this application. YES NO option

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

Where is, or where will your project be based?

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

What is the main impact area of your organisation?

- Community cohesion
- Debt and financial inclusion
- Education and learning
- Employment and training
- Environment
- Health and wellbeing
- Housing and homelessness
- Infrastructure support
- Poverty and low incomes
- Tackling crime
- Tackling inequalities
- Other (please give details)

Who are your main beneficiaries – e.g. young people or children with disabilities? Choose the main beneficiary group from the list below

- A geographical community
- Black and minority ethnic (BAME) communities
- Families
- Homeless or vulnerably housed people
- LGBTQ+ people
- Migrants, refugees or asylum seekers
- Older people
- Other social enterprises or charities

- 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)

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 C: About you

Do you have direct experience of the issues you are trying to address?

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

Section D: Your organisation

Tell us about your organisation (max 300 words)

- Please give a brief history of your organisation. How and why was it set up?
- What is the social or environmental purpose of the organisation?
- What are its main activities?

Who are the key beneficiaries and how many are there? (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)

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 E: Your plans for growth

What are your plans for growing your organisation in the next year?   *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? (max 250 words)*

Projected income

Please provide your estimated income for the next year.

- 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.
- You may wish to upload supporting documents at the end of this application form.

Section F: The learning programme

Why do you want to take part in the 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 G: 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 to support your learning about growing your organisation? (max 150 words***) You may change this later if necessary, but it helps to understand your current plans.*

Section H: Your legal structure

What is its current legal structure of your organisation? - For example: Charity, Community Interest Company, Company Limited by Shares, Unincorporated Association, etc.

If you don't have a legal structure yet or you are planning to change it, or you are hosted by a larger organisation, please explain here. You will need to have a legal structure in place by the start of the programme.

When did you first register your organisation?

Company/CIC registration number (if applicable)

Charity number (if any)

Other registrations (if any)

Section I: Detailed financial information

Please provide the following information where possible for **your last financial year and**

your current financial year. If you do not have details, 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.)*

- Your organisation's turnover (income) and expenditure for your last financial year and your current financial year
- Net profit or loss
- Net assets (reserves) at the end of for **your last financial year and your current financial year**

Please provide a breakdown of income sources for your last financial year and your current financial year **e.g. grants, sales of products, contracts, etc.**

If there is anything unusual in your accounts, including significant debts or unusual entries, please explain here (if not explained in the accounts).

Does your organisation have any significant assets, such as property or intellectual property?

Section J: 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 K: Other information

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

Section L: Uploads

Your most recent accounts

Please provide a copy of your organisation's most recent annual accounts when prompted to do so at the end of this application form. *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 upload your governing document.

Please name the file in the format 'Projectname GoverningDoc' e.g. 'FreshStart GoverningDoc'

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

Please upload your income projections, if applicable.

Please upload your safeguarding policy, if applicable.

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

Please name the file in the format 'FirstnameSurnameFilename'; or 'ProjectnameFilename'; - e.g. HelenBrookerAccounts

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)