Social Enterprise Support Fund

2021/2022

Application questions – Round 1

Please note: you must apply using our online form at
http://sesf.org.uk/apply

Accessibility

If this document is formatted in a way that is not accessible to you, please email help@sesupportfund.org.uk and we will share this information in a more appropriate format.

COMMUNITY FUND | Social Enterprise Support Fund

Delivered by

THE BIG ISSUE INVEST   Key Fund Growing Enterprise in Communities   resonance   school for social entrepreneurs   UnLtd

Introduction

Below are the application form questions with notes on completion. This is to help you prepare your answers. **You must apply on the online form on the website, not this form**. We cannot accept emailed applications.

Please read the Application Guidance and FAQs first. This will help explain why we are asking the questions and will help you provide the correct information.

You must complete all questions that are marked as required and attach documents as requested. You should have appropriate authorisation from your organisation to complete all parts of this form in full.

If you are using a phone or tablet, the questions and tables will format much better in landscape.

PLEASE READ

SAVE AND RESUME

Please save your work regularly - ideally at the end of each page.
If you don't, you may lose your information.

PLEASE ENSURE YOU COPY THE LINK OR ENTER AN EMAIL EVERY TIME YOU SAVE.
A new link is created each time you save. We cannot access the form or retrieve it for you, so unless you keep the link or have it emailed to you, **your application will be lost**.

If you do save, you can return to your application,
BUT YOU MUST COMPLETE BEFORE THE DEADLINE.

When you submit the application form, you should receive an email to confirm submission. If you don't receive this, please contact us.

Word counts: Some boxes have a maximum number of characters you can use. This is the system that this software uses. If you prefer to use a word count, 600 characters is aproximately 100 words.

Documents you need when you apply

These are the required documents we will ask you to attach at the end of the form:

- **Annual accounts for the last two financial years** if you have them. These must be full accounts, not abbreviated or filleted. Draft accounts are fine, if this is all that is available. If you have not yet prepared a set of accounts because your organisation is too young, please submit management accounts instead.
- **Management accounts** for the period up to at least **30th September 2021**. If your statutory accounts cover this period, that is fine. If not, please provide financial information up until at least the end of September 2021.

- **For applications over £50,000, a cashflow statement for the next 12 months.** This is a requirement for applications over £50,000, but if you are applying for less and you want to include a cashflow statement please do feel free, as it helps us to understand your organisation. It would also be helpful if you could provide:
- A recent **social impact report or short case study** about your work.

Please save documents with your organisation name in the file name – for example, *"OrganisationName-managementaccounts"*

Please get in touch via email if you have any further questions: help@sesupportfund.org.uk

A: Your details

A1: Legal name of your social enterprise   Required

Please tell us the legal name your organisation is registered under.

A trading subsidiary may apply on its own behalf if it fulfils the criteria. However, if a charity and its trading subsidiary are applying together as a group, please give information for the whole group and tell us about this in the notes at the end.

A2: Other names used by your social enterprise, if any

Please tell us if your organisation has a trading name or any other names.

A3: In one sentence, what does your social enterprise do?   Required

For example, you might say what it does, who it benefits, where it is, such as "We provide befriending services for older people in Newcastle"

A4: Main address of your social enterprise   Required

This is your main contact address

A5: Project postcode: Where do most of your activities take place?   Required

It may be the same as above or different if your activities take place elsewhere. If more than one place, give the postcode for the main one.

A6: Website (if you have one)

A7: Social media accounts (if you have any)

It is really helpful to have details of your Facebook or other social media accounts if available.

A8: Primary contact for this grant   Required

This should be the CEO or a board member who is authorised to make this application. Please provide the name they use for official purposes and a year of birth for ID purposes. This is so we can do basic due diligence checks. This question asks for the primary contact's name, role and contact details.

A9: How did you find out about this programme?

For example, did you see it on a Facebook post from UnLtd or an ebulletin from SSE or information through another organisation? (max 300 characters, approx. 50 words)

B. Eligibility criteria

This is a check that you fit the eligibility criteria for this programme.

B1: Does your social enterprise mainly work with people who live in England?	Required

(must be yes to be eligible)

B2: When was your social enterprise registered?	Required

(must be prior to 31st December 2020 in most cases to be eligible, but see below for exceptional circumstances)

Your social enterprise must have been incorporated for at least one year to be eligible for this fund. This means it must have been registered with EITHER Companies House, the Financial Conduct Authority (FCA) or the Charity Commission one year ago. You can check the date of registration on the [Companies House](#), [Charity Commission](#) or [FCA Mutuals Register](#)

B2a: If registered less than a year - Please explain:

Only organisations that have been registered for at least a year can apply. If your organisation has been in existence for over a year, but has recently changed legal structure (e.g. moving from an unincorporated charity to a CIO) then explain the change here.

B3: Is your social enterprise legally incorporated and asset locked?	Required

(must be yes to be eligible)

There is more information about this in the FAQs. All charitable companies, CIOs and CICs can respond Yes to this question. If you have another structure, you may want to check the Guidance or the FAQs for further details. If you are not sure, you can contact us.

B4: Was your annual income between £20,000 and £1.8 million either in your last financial year, or the previous financial year (pre-COVID-19)?	Required

You will be asked to demonstrate this with a set of company or charity accounts for the last financial year, or a set of management accounts for the year to 30th September 2021. If your organisation has been established recently, and has income of £20,000 over the last 12 months, but not in your last financial year, please contact us.

B5: Is your social enterprise substantially reliant on income from trading?   Required

(must be yes to be eligible)

Your social enterprise must have a business model which is substantially reliant on income from trading to deliver social impact. By income from trading, we mean both sales of goods and services, as well as the delivery of contracts to supply goods or services.

If you were not able to trade last year, you must be able to demonstrate that you were previously substantially reliant on trading, or that your business model is substantially reliant on trading. There is more information about this in the FAQs.

B6: Is your social enterprise financially resilient?   Required

(must be yes to be eligible)

We mean that:

- *Your social enterprise is not facing insolvency proceedings*
- *It can manage debts and loan repayments*

It may be facing difficulties at the moment, but with our support, it will survive the next 12 months and beyond.

B7: Do you have a dual authority bank account (or are you prepared to put a dual authority bank account in place if offered a grant)?   Required

(must be yes to be eligible)

Dual authority means that at least two unrelated people must sign cheques or release funds from your account.

C: Your social enterprise

C1: What is the legal structure of your organisation? Required

*Choose **one***

You must be incorporated to apply, which means you must be a charitable company or charitable incorporated organisation (CIO), or registered with Companies House or the FCA. If you are not sure, contact us.

- *Charitable company*
- *Charitable Incorporated Organisation (CIO)*
- *CIC Ltd by Guarantee*
- *CIC Ltd by Shares*
- *Community Benefit Society*
- *Co-operative Society with an asset lock*
- *Company Ltd by Guarantee with an asset lock*
- *Company Ltd by Shares with an asset lock*
- *Other*

If Other, please provide information

C2: What is your charity number?

(if you have one)

All registered charities have a charity number, but some charities are not required to register.

You can find this at https://beta.charitycommission.gov.uk/

A charity number, company number or a FCA number is required.

C3: What is your company number?

(if you have one)

All companies and CICs will have a company number. You can find this at https://beta.companieshouse.gov.uk/

C4 – What is your FCA registration number?

(if you have one)

For Community Benefit Societies, Co-operative Societies and other mutuals - You can find this at https://mutuals.fca.org.uk/

C5: Where is your social enterprise based?   Required

*Choose **one***

*Where you deliver the majority of services, or your head office if you deliver
across multiple locations? If you are unsure, there is a map available here
(clicking will download the map).*
- *East Midlands*
- *East of England*
- *London*
- *North East*
- *North West*
- *South East*
- *South West*
- *West Midlands*
- *Yorkshire and Humber*

C6: Does your social enterprise work with children under 18 or adults at risk?   Required

Y/N

C6a: If yes, do you have a safeguarding policy in place?

Y/N

C7: What sectors do you operate in?   Required

*Choose **up to two** that best represent your social enterprise from the list.*
- *Agriculture, Forestry and Fishing*
- *Nursery or children's day care*
- *Arts and entertainment*
- *Real estate management (excluding housing)*
- *Catering and food services*
- *Retail trading*
- *Community development*
- *Social care*
- *Education*
- *Sustainable energy supply*
- *Financial services*
- *Tech4Good (e.g. IT services, Apps dev etc.)*
- *Healthcare*
- *Tourism and accommodation (e.g. hotels)*
- *Housing*
- *Transportation*
- *Manufacturing*
- *Wholesale trading*
- Other (*If other, please state which*)

C8: Who does your social enterprise work with? Required

*Choose **up to three** groups that best represent your social enterprise from the list.*

- *Vulnerable children (0-16)*
- *Vulnerable young people (16-25)*
- *Vulnerable parents*
- *Vulnerable older people (65+)*
- *Experiencing unemployment*
- *Living in precarious housing or homeless*
- *Living in poverty and/or financial exclusion*
- *Dealing with addiction issues*
- *Health condition, life threatening illness or end of life*
- *Learning difficulties and other neurodivergence*
- *Mental health needs and conditions*
- *Unpaid carers*
- *Ex-offenders and prisoners*
- *Experienced crime or abuse*
- *Refugees, asylum seekers and other migrants*
- *Roma/Traveller communities*
- *Living in rurally isolated communities*
- *No specific group*
- *Other (if other, please state which)*

C9: How does your social enterprise involve people with direct lived experience of the issues that your social enterprise deals with? Required

For example, do you have people with lived experience on the board, or as staff members or volunteers, or do you consult with them? For a definition of "lived experience" please see the FAQs. (max 600 characters, approx. 100 words)

C10: Please tell us about the make up of your board and leadership…

Inclusivity is a real priority for us. Completing this section will help us to ensure that our assessments and funding are inclusive, reaching diverse communities and those who have been most affected by Covid-19 and by increasing inequality. This will be used by assessors to understand your social enterprise's governance and leadership.

This is only one part of our assessment process - social enterprises which can demonstrate strength against our other priorities should continue to apply.

We are collecting this data as part of the public interest conditions under GDPR rules (Schedule1, Data Protection Act 2018) to support equality of opportunity or treatment.

Please read the Application Guidance on the meaning of Leaders with Lived Experience before completing this section.

How many people are on your Board? *(i.e. directors or trustees)*

How many people are in your Senior Leadership Team, if any? *(i.e. your CEO together with senior managers)*

Please tell us about the make-up of your Board and your Senior Leadership Team.

Your Board

Your Board	None	Up to 25%	26% to 50%	51% to 100%	Prefer not to say
…from Black, Asian and minority ethnic communities?	○	○	○	○	○
…from the LGBTQIA+ community?	○	○	○	○	○
…consider themselves to have a disability?	○	○	○	○	○
…identify as women, non-binary or intersex?	○	○	○	○	○
…have lived experience of the issue that your social enterprise addresses?	○	○	○	○	○

Your Senior Leadership Team

Your Senior Leadership Team	None	Up to 25%	26% to 50%	51% to 100%	Prefer not to say
...from Black, Asian and minority ethnic communities?	○	○	○	○	○
...from the LGBTQIA+ community?	○	○	○	○	○
...consider themselves to have a disability?	○	○	○	○	○
...identify as women, non-binary or intersex?	○	○	○	○	○
...have lived experience of the issue that your social enterprise addresses?	○	○	○	○	○

Your CEO

Your CEO	Yes	No	Prefer not to say
...from Black, Asian and minority ethnic communities?	○	○	○
...from the LGBTQIA+ community?	○	○	○
...consider themselves to have a disability?	○	○	○
...identify as women, non-binary or intersex?	○	○	○
...have lived experience of the issue that your social enterprise addresses?	○	○	○

C11: Have you received support, investment or training from any of the SESF Partners in the past?   Required

The SESF Partners are Big Issue Invest, Resonance, School for Social Entrepreneurs, The Key Fund and UnLtd.

Y/N

You may have had training, advice, a grant or loan finance from these organisations. You can select as many as apply. This will help us understand if you are already known to us and may help us speed up your assessment. If you haven't had support from these organisations before, that is not a problem. You will be assessed on the same basis, but we may need a little more time.

C11a: If you have received support, which organisations have you received support from?

(tick all that apply)

- *Big Issue Invest*
- *The Key Fund*
- *School for Social Entrepreneurs (SSE)*
- *Resonance*
- *UnLtd*

C12: If yes, please choose, which of these organisations you would prefer to assess your application?

This will help us direct your application to an organisation that already knows you.

- *Big Issue Invest*
- *The Key Fund*
- *School for Social Entrepreneurs (SSE)*
- *Resonance*
- *UnLtd*

D. Your impact

D1: Describe how your social enterprise addresses social need.

Required

For example, what activities does it run, what services does it provide, who does it help? (max 1250 characters, approx. 200 words)

We want to support organisations that are making a difference. Tell us about the activities of your organisation, who you were helping and what difference your organisation made. You can upload an impact report or case study at the end of the application if that helps.

D2: What did your social enterprise do differently during the COVID crisis?

Required

For example, you may have had to close services, change how you delivered services or you may have developed new services? (max 1250 characters, approx. 200 words)

We understand that organisations have had to respond in different ways. We want to understand what the last year has been like for you, to put your application in context.

D3: How many FTE (full time equivalent) staff did your social enterprise employ on 31st March 2020?

Required

Please include those on furlough. Two staff working half time is 1 FTE staff member.

D4: How many FTE staff did your social enterprise employ on 31st March 2021?

Required

Please include those on furlough.

D5: How many volunteers does your social enterprise usually have?

Required

We know this may have changed recently. Give a good estimate, but it doesn't have to be exact. Please include unpaid board members.

D6: Roughly how many people have directly benefitted from the activities of your social enterprise over the last 12 months?

Required

We mean people who are taking part in activities or directly receiving services. Where possible, please only count each person once, even if they accessed your activities or services more than once.

D7: Roughly how many people directly benefitted from the activities of your social enterprise in the year before COVID-19?

Required

We want to understand how things have changed for you. If you were not active pre COVID-19, then just write '0'

D8: How often and for how long do people benefit from your activities, on average?

Required

This will help us understand how intense the support you provide is, especially if you reach fewer people because of this. For example "We work with trainees for two days a week for a 12-week period, and then they have a personal mentor who offers support on a monthly basis over six months." (max 100 words)

D9: Is your social enterprise targeted at Black, Asian and minority ethnic communities?

Required

Y/N

D10: Is your social enterprise targeted at LGBTQIA+ communities?

Required

Y/N

D11: Is your social enterprise targeted at people who consider themselves to have a disability?

Required

Y/N

D12: Is your social enterprise targeted at women?

Required

Y/N

E: Your financial situation

E1: What is your financial year end date?   Required

E2: Do you have a set of statutory annual accounts for your last financial year?   Required

These are accounts that you submit to the Charity Commission, Companies House or the FCA. If yes, please include them in the uploads at the end of the application. They should be full accounts, showing income and expenditure as well as the balance sheet. You can submit draft accounts if they are not yet finalised. If you have registered in the last 20 months, you may not yet have had a set of accounts.

E3: What was your total income in the last financial year?   Required

(or last 12 months if you do not have annual accounts yet)

E4: Please tell us about how your financial situation has changed recently.

Do not include loans or equity income. If zero, please write "0". You will need to enter something in every box to continue. Please note that if you are using a phone or tablet the table will format much better in landscape

	Actual for financial year pre April 2020 (pre COVID-19)	Actual for last financial year	Expected for this financial year
The year end date – *e.g. 31/03/2020, 31/03/2021 etc*			
Income from trading			
Sales	£	£	£
Rent/lettings	£	£	£
Contracts	£	£	£
Other income from trading	£	£	£
Total Income from trading	£	£	£
Non-Trading Income			
Donations	£	£	£
Grant income	£	£	£
Government COVID-19 support *(e.g. Furlough, Small Business Grant)*	£	£	£
Other non-trading income	£	£	£
Total non-trading Income	£ automatically calculated	£ automatically calculated	£ automatically calculated
TOTAL INCOME	£ automatically calculated	£ automatically calculated	£ automatically calculated
Expenditure	£	£	£
Profit/Loss	£ automatically calculated	£ automatically calculated	£ automatically calculated
Percentage of total income that is from trading	£ automatically calculated	£ automatically calculated	£ automatically calculated

E5 Please explain why your income or expenditure has changed, if at all?

For example, increased grant income due to emergency COVID funding, sales dropped as café closed etc. (max 100 words)

Required

E6: Which types of emergency government funding or loans related to COVID-19 have you had (if any)?

Tick as many as you have had

- *Small Business Grant*
- *Retail Leisure and Hospitality Grant*
- *Job Retention Scheme (furlough)*
- *Bounce Back Loans*
- *CBILS backed loans*
- *Other government COVID-19 grant schemes*
- *None of the above*
- *Other*

Required

E6a: If other, please state which?

Required

E7: What else did you do during COVID-19 to manage your money?

For example, reducing services, delaying expenditure, requesting reallocation of grant funding, applying for other funding? (max 600 characters, approx. 100 words)

Required

E8: Approximately how much unrestricted cash reserves do you currently have?

These are your current assets, i.e. cash in the bank or money about to be paid to you, that is not restricted for specific purposes.

Required

E9: How have your reserves been impacted in the last 12 months? Are you likely to run out of money in the next 12 months?

We want to support organisations who are in need, but who are going to be sustainable in the long term. (max 600 characters, approx. 100 words)

Required

E10: If you hold more than six months of cash reserves, do you have any specific reasons for this?

Cash reserves are your reserves that are not locked up in buildings, equipment or other fixed assets. You may need to have larger cash reserves if you need to maintain a building, for example (max 600 characters, approx. 100 words)

E11: If you have a negative balance sheet in the last financial year, or your organisation is currently in debt, please explain how you are managing this.

A negative balance sheet means that your total liabilities are greater than your net assets. *(max 600 characters, approx. 100 words)*

F: Your trading activity

F1: Please provide a description of your trading activities.   Required

For example, is your trading income from a café or shop, services, sales of donated goods etc. If you have traded les,s or not at all in the last year, please describe your normal trading activities. (max 1250 characters, approx. 200 words)

F2: What are your plans for trading over the next 12 months?   Required

Tell us about how you expect to trade over the next year, including continuing or expanding current activities, or developing new trading activity.

If you have not traded much in the past, but your future business model is substantially dependent on trading, please explain what has changed and how far your plans are developed.

This fund is focused on organisations that are substantially reliant on trading. If you have not traded before, your plans to trade must be well developed, realistic and achievable. We would expect that your organisation would be substantially trading within 12 months (max 1250 characters, approx. 200 words)

G: Your funding request

G1: How much are you applying for? Required

You can apply for up to £100k, but most grants will be between £10k and £50k. Note that the grant is for 12 months only. If you are asking for more than your annual income, then you will need to explain this carefully. This amount should be the same as the total budget (G11)

G2: Are you requesting more than £50,000 grant funding? Required

If yes, please attach a cashflow statement for the next 12 months at the end of the application form. Please make it clear if you are including this grant in your cashflow or not.

G3: Funding request name Required

Please give your funding request a name. This is for reporting purposes for The National Lottery Community Fund (TNLCF). It doesn't matter what it is, but it helps us and TNLCF to understand quickly what you are asking for. It could be something like "Help to re-open our café", or "Ongoing support for our community", or "Getting kids back to school". (max 100 characters, approx. 15 words)

G4: Summarise your request for funding Required

For example: We need funding to help us get back to trading. We want to open our café, which is a training café for people who have been homeless, but we need PPE, and to make the space COVID-secure. We have brought staff back from furlough, but we do not expect our sales to cover staff costs for at least 6 months. We want to be able to do marketing and outreach to help bring our customers back. (max 600 characters, approx. 100 words)

G5: How will this funding help you to support the communities you work with? Required

Tell us what you plan to do and how it will make a difference to the people you work with - For example. Our café is a training café supporting homeless people. This funding will help us to reopen the café and start providing training services for 60 homeless people over the next year. (max 1800 characters, approx. 300 words)

G6: How would this funding help you to get your social enterprise back on track?

Required

This question is about how this fund will strengthen your social enterprise. Tell us the difference this will make to your organisation, to your ability to trade, to your staff and volunteers etc. Help us to understand the long term impact on your social enterprise.

For example: This funding will help us restart our trading, by bringing staff back from furlough, providing training and support to staff members and volunteers, support marketing activity and develop a new online ordering service to increase our trading. This will help us ensure that our café will be self-sustaining within the next two years. (max 1500 characters, approx. 240 words)

G7: In summary, tell us about the intended impact of this funding. What difference it will make to your community and your social enterprise?

Required

For example: This funding will provide training for 12 people with learning disabilities, help retain jobs for two people with learning disabilities and provide a community space for around 500 people. (max 600 characters, approx. 100 words)

G8: Please provide three outcomes you want to achieve with the funding from SESF?

Required

What are three key outcomes you would like to achieve with this funding? These could be about how you are working with your community and/or about how your social enterprise is strengthened. As far as possible, try to make these specific and measurable.
For example: " We will employ a community outreach worker who will reach 500 new families in our area". (up to 25 words each)

Outcome 1:

Outcome 2:

Outcome 3:

G9: How many FTE staff will be supported through this funding?   Required

Only include paid staff (not sessional workers and volunteers) that will be directly funded with this grant. Please use full time equivalent (FTE) – so 0.5 for someone working on this project half time.

G10: Have you applied to anyone else to fund this activity?   Required

Y/N

G10a: If so, please give details and when you expect to hear from them

G11: Tell us how you want to spend your grant   Required

You can apply for funding for a 12-month period from the Grant Offer date. See guidance for what can be covered. The total budget should be the same as the funds requested above (G1).

External Consultancy and Support: If you wish to, you can bid for external support and consultancy to help you strengthen your social enterprise. You can bid for up to £5,000, though we may cap this at 15% of your total grant. This might be helping you with business planning or strategy, improving internal systems such as financial systems, getting specialist HR support, help with demonstrating your impact or other things. Sadly, we cannot fund fundraising consultants. This relates only to business consultancy support – It does not include purchasing services such as website design, sessional staff etc, which you can include in Project Costs or Other.

Budget *type*	*Amount*	*Detail of funding request (e.g. which posts will salary costs fund, details of project costs, what equipment is required etc.)*
Salaries		
Project costs		
Equipment		
External consultancy and support		
Other		
TOTAL		

H: External Consultancy and Support:

H1: Have you included external consultancy and support in your budget?

Required

Y/N
You can bid for up to £5,000 of external consultancy and support, though we may cap this at 15% of your total grant. If you ask for this, we will also offer you two one-to-one support surgeries and signposting to consultancy support. These support surgeries are optional.

H2: What external consultancy and support would you like help with, if any?

Required

If you are asking for external consultancy or support, then please describe what this is and how you will use it. If you don't know yet, there will be an opportunity to discuss this with us if you get a grant.

For example: We need additional support with developing our business model and marketing, to support us in entering the catering market. We want to hire a consultant to help us understand this business, develop our pricing structure, identify clients and support marketing. (max 600 characters, approx. 100 words)

H3: How would you define your external consultancy and support needs?   Required

*This will guide us in developing our one-to-one support surgeries and to understand your needs. Please choose up to **five** options, or indicate you don't know yet.*

- *Leadership Support/Mentoring*
  - *Coaching, mentoring or supervision for senior staff or board members*
- *Diagnostic Review*
  - *An all-round health check for your organisation to assess strengths and weaknesses*
- *Business Planning*
  - *Developing/revising our overall business model/business planning*
  - *Developing/revising our business model for a specific product/service*
- *Marketing and Communications*
  - *Branding*
  - *Marketing*
  - *Social media*
  - *Developing or improving websites*
  - *Community engagement*
- *Sales, Product and Pricing*
  - *Sales strategy and market segmentation*
  - *Product development and pricing*
  - *Managing retail outlets*
- *Impact Strategy and Measurement*
  - *Developing or reviewing impact strategies*
  - *Developing a theory of change*
  - *Developing measurement frameworks*
  - *Data collection, analysis and reporting*
- *Income Generation*
  - *Winning contracts/working with commissioners*
  - *Crowdfunding*
  - *Community share offers*
  - *Working with corporates*
  - *Developing fundraising skills and strategies with trusts and foundations - (we cannot directly support bid writing with this fund)*
  - *Developing fundraising skills and strategies for individual donors*
- *Strategy and Partnerships*
  - *Support to develop partnerships with other organisations to deliver services*
  - *Mergers and takeovers*
  - *Organisational strategy*

- ***Equality, Diversity and Inclusion*** Required
  - *Training on equality, diversity and inclusion*
  - *Organisation wide development or review of EDI practices and policies*
  - *Support with reaching diverse communities and supporting inclusive service delivery*
  - *Reviewing employment and volunteering strategies*
  - *Board representation and user involvement*
- ***Preparing for Social Investment***
  - *Understanding social investment*
  - *Preparing for social investment*
- ***Financial Skills, Strategy and Advice***
  - *Understanding basic finances and accounting (budgeting, cashflows, reporting, accounts)*
  - *Improving financial planning and management (financial procedures, strategy, reporting and processes)*
  - *Taking on and/or managing financial software systems (using financial software, EPOS systems, online booking)*
- ***Tax and VAT Advice***
  - *Tax advice (VAT, tax reliefs, gift aid)*
- ***HR Support***
  - *Advice on restructuring and redundancy*
  - *Improving recruitment systems*
  - *Reviewing staff remuneration*
  - *Improving HR systems, policies and procedures*
  - *Managing staff*
  - *Managing volunteers*
- ***Legal Structures and Governance***
  - *Legal structures (including changing or updating governing documents, establishing trading subsidiaries, charity registration)*
  - *Reviewing board performance, structures and engagement*
- ***Policies and Procedures***
  - *Advice on GDPR*
  - *Safeguarding practice and procedures*
  - *Health and safety*
  - *Other*
- ***Other***
- ***Don't know yet***

I: Equal Opportunities Monitoring

We are monitoring the leadership inclusivity of organisations that apply for our funding. We asked for information on your Board, Senior Leadership Team and CEO earlier on in the application form, which will be used in the assessment of your application.

The more detailed information collected here is solely for monitoring and will not be used in assessing your application*. The information on this page will be kept separately from your application and will not be seen by assessors.*

This is to help us ensure that our funding is as inclusive as possible. We are collecting this data as part of the public interest conditions under GDPR rules (Schedule1, Data Protection Act 2018), to support equality of opportunity or treatment. We are using data categories developed by 360Giving.

Please tick as many boxes as apply to your Board or Senior Leadership Team. It doesn't matter about numbers here. If you don't know or prefer not to say, you can tick those boxes at the bottom of each section.

There are separate questions for YOUR BOARD, YOUR SENIOR LEADERSHIP TEAM and YOUR CEO

Ethnicity

Do any of your board members/Senior Leadership Team/CEO identify as Black Asian and Minority Ethnic?

Y/N/Don't know/Prefer not to say

If yes, please tick all that apply:

- ☐ ***Black/African/Caribbean/ Black British***
    - ☐ *African*
    - ☐ *Caribbean*
    - ☐ *Any other Black/African/Caribbean background: If other, please describe*
    - ☐ *Don't know*
    - ☐ *Prefer not to say*
- ☐ ***Asian/Asian British***
    - ☐ *Indian*
    - ☐ *Pakistani*
    - ☐ *Bangladeshi*
    - ☐ *Chinese*
    - ☐ *Any other Asian background: If other, please describe*
    - ☐ *Don't know*
    - ☐ *Prefer not to say*
- ☐ ***Mixed***
    - ☐ *White and Black*
    - ☐ *White and Asian*
    - ☐ *Any other Mixed/Multiple ethnic background: If other, please describe*

- [ ] *Don't know*
- [ ] *Prefer not to say*
- [ ] ***Other group experiencing ethnic or racial inequality***
  - [ ] *Arab*
  - [ ] *Jewish*
  - [ ] *Gypsy, Roma and Traveller communities*
  - [ ] *Any other ethnic group: If other, please describe*
  - [ ] *Don't know*
  - [ ] *Prefer not to say*
- [ ] ***Don't know***
- [ ] ***Prefer not to say***

Disability

Do any of your board members/Senior Leadership Team/CEO identify as disabled, with particular impairments which have a long-term impact on quality of life?

Y/N/Don't know/Prefer not to say

Please tick all that apply:

- [ ] ***Physical impairment***
  - [ ] *Mobility*
  - [ ] *Visual impairment/partial sight/sight loss*
  - [ ] *Hard of hearing/deaf/hearing loss*
  - [ ] *Speech impairment*
  - [ ] *Don't know*
  - [ ] *Prefer not to say*
- [ ] ***Mental health***
- [ ] ***Cognitive differences***
  - [ ] *Learning disability*
  - [ ] *Learning difficulty*
  - [ ] *Neurodivergent*
  - [ ] *Don't know*
  - [ ] *Prefer not to say*
- [ ] ***Long-term health conditions***
- [ ] ***Other: please describe***
- [ ] ***Don't know***
- [ ] ***Prefer not to say***

Gender Identity and Sexual Orientation

Do any of your board members/Senior Leadership Team/CEO identify as LGBTQIA+?

Y/N/Don't know/Prefer not to say

Please tick all the boxes that apply:

- ☐ *Bisexual*
    - ☐ *Bisexual men*
    - ☐ *Bisexual women*
- ☐ *Gay men*
- ☐ *Lesbian/Gay women*
- ☐ *Transgender*
    - ☐ *Trans men*
    - ☐ *Trans women*
- ☐ *Non-binary*
- ☐ *Other: please describe*
- ☐ *Don't know*
- ☐ *Prefer not to say*

J: And finally…

J1: Is there any other information you need to tell us about this application?

(max 1250 characters, approx. 200 words)

J2: Permission to contact you about other offers	Required

The SESF Partners (SSE, Resonance, Big Issue Invest, Key Fund and UnLtd) would also like to contact you in the future about other courses, funding, investments and support that they offer, whether or not you are successful with this application. They will always treat your personal details with care and never sell your details to others for marketing purposes.

- *I consent to the use and processing of my personal data by the SESF Partners in order to provide me with information and advertising regarding their products or services, including by email. I understand that I may withdraw my consent at any time.*

Y/N

Checklist

☐ Please check that you have completed all the questions

☐ Please check that all the eligibility questions are complete and correct.

☐ Please check that G1 (the amount you are asking for) is the same as your total budget in G11

Please tick to let us know you are attaching the following documents:

☐ Annual accounts for your last financial year (if available)

☐ Annual accounts for the previous financial year pre COVID-19 (if available)

☐ Management accounts to at least 30th September 2021 (if not covered by annual accounts)

☐ Cashflow (required if applying for over £50,000, optional if up to £50,000)

☐ Social Impact report or case study (optional)