

## Enterprise Development Programme: Application guidance Mental Health

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### What is the Enterprise Development Programme?

The Enterprise Development Programme (EDP) is a five-year programme, funded by Access – The Foundation for Social Investment. It is managed by a coalition of partners, including multiple infrastructure bodies (sector leads) and Social Investment Business as a strategic grant partner.

The programme piloted in the homelessness and youth sector in 2018. Following great success, the equality and mental health sector joined the partnership in late 2019. Each sector is involved in the programme for three years.

Support from the programme enables organisations to grow financial resilience and impact by providing a mixture of grant and learning support to help get enterprise ideas off the ground.

Those interested in applying will have to share details of enterprise ideas or motivations and explain how this idea will benefit your wider organisation, service users and community.

If accepted onto the programme, participating organisations work collaboratively with sector leads – the [Association of Mental Health Providers](#), the [Centre for Youth Impact](#), [Equally Ours](#), [Homeless Link](#), [Ubele Initiative](#) or [Groundwork](#) throughout the programme’s journey to best identify support needs (both learning and grants) and create a co-designed support package.

Co-designed packages of support will likely include some of the following:

- Access to a bespoke learning package co-designed by you and your sector- lead.
- The opportunity to apply for either a feasibility or development grant to put your learning into action (grants are capped at a maximum of £30,000 and are subject to agreed conditions, milestones, and evidence of growing income).

- Extensive peer-learning and networking opportunities.
- Access to a team of pro bono legal experts to act as a sounding board and guide you through the legal considerations of trading.
- Invitations to conferences on enterprise development and social investment within the wider charitable sector.

## Who is eligible for applying to EDP?

Organisation applying to programme must meet the following criteria:

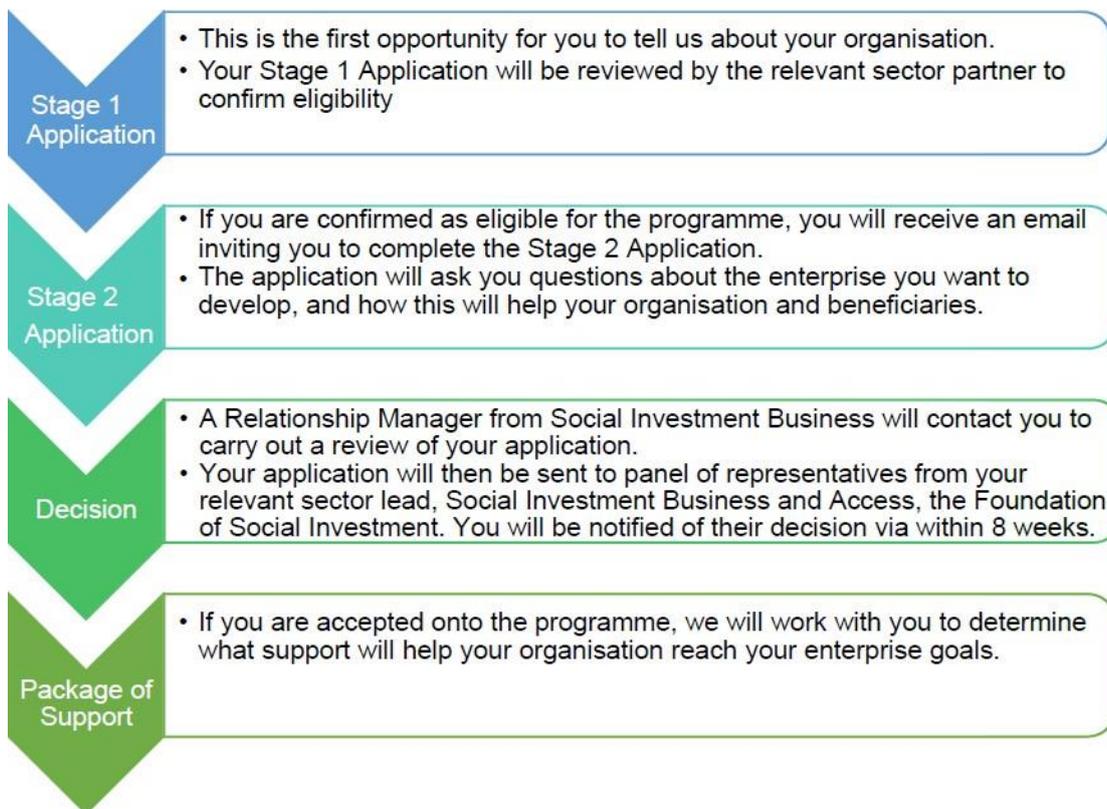
- Be interested in exploring new models of trading to help build financial resilience but that require initial grant and learning support to get these ideas off the ground. The long-term goal of applicants may be to take on social investment but that isn't a requirement for a place on EDP.
- Must be a social enterprise, charity or not-for-profit company based and working in England
- Be an incorporated organisation and have a clear social mission
- Distribute less than 50% of post-tax profits and reinvest at least 51% of surpluses into pursuing their social mission, and have a constitutional or contractual lock on their social mission, dividend, and surplus distribution policy (also known as an asset lock)
- Funding cannot be used for activities that promote religious or political purposes
- If you are a faith-based organisation, you can apply but your services must be open to people of all or no faith.

For this round, we would **particularly welcome applications** that demonstrate some of the following:

- Organisations that support rural areas of England
- Organisations that provide mental health provision in the midlands
- Organisations that provide specialist or crisis support for those with severe mental health/illness
- Organisations that offer meaningful training / employment pathways for beneficiaries within their enterprise operation
- Organisations with lived experience within their leadership
- Enterprise operations that have been in existence for over 6 months and have already achieved sales

## What is the application process?

### Stage One – eligibility application form overview



The first step of the process is to complete Stage One of the application form. It will take you up to 45 minutes to complete this.

The form is designed to get an understanding of:

- Your organisation, its setup, what you do and where you operate
- Your social mission and purpose
- Some brief understanding of your enterprise idea
- Understand your organisation's income streams
- Who your organisation supports

### Stage One Guidance by Question

Although most questions are self-explanatory, below you will find guidance on some of the questions on the form to help you complete your application.

#### Section 2 Organisation details

***In what year was the organisation established (this will usually be the year the organisation was incorporated)?*** By this we mean when did your organisation become incorporated so you could trade, for example became a registered charity, company limited by guarantee, social enterprise etc.

**What is the organisation's legal status?** – Please select from the drop down list your organisation's legal status as registered with companies house and/or the charity commission:

Charitable Incorporated Organisation  
Company Limited by Guarantee  
Company Limited by Shares  
Community Interest Company Limited by Guarantee  
Community Interest Company Limited by Shares  
Industrial and Provident Society  
Limited Liability Partnership  
Local Authority  
Mutual (Friendly Society)  
Registered Society (BenCom is a Community Benefit Society)  
Registered Society (Cooperative)  
Unincorporated  
Other

Further guidance on legal status can be found here on the [Charity Commission](#) and [Companies House](#) website.

**What is your organisation's mission?** – By this we mean your organisation's mission as outlined in your governing document:

### **Section 3: Organisation Attributes - Diversity**

The primary purpose of these questions is to monitor that we are encouraging; receiving and accepting applications from a diverse range of organisations representative of our sector partner populations and doing all that we can to provide for organisations that might require extra support.

The data will also feed into wider on-going programme reporting and learning. Data will only be reported at the aggregate level and will never be used to identify a particular organisation or individual. Completion of these questions is encouraged but voluntary.

**How many people are there that are 'decision makers' within the organisation?** – In the number you provide, please ensure you include your trustees/directors, as well as any senior management team who have organisational decision-making responsibilities. By 'decision makers' we mean those that decide on core strategic and financial matters, not individuals involved in a consultation prior to decisions that are subsequently taken by another group.

**How many of these decision makers are from BME?** How many people in positions of authority come from a Black and Minoritised Communities?

**How many of these decision makers are LGBT?** How many people in positions of authority identify as Gay, Lesbian, Bisexual, Transgender, Queer, or Intersex

**How many of these decision makers identify as having a disability?** This should include those who have a physical or mental disability.

**How many full-time employees does the organisation have?** We mean those who work 35 hours or more a week.

### Section 3: Organisation Attributes

**How many Part Time Employees does the organisation have?** We mean anyone who is an employee working less than 35 hours.

**How many volunteers does the organisation have?** This should include any volunteers or Trustees who don't get paid for their time.

**What is the organisation's scale of delivery?** By this we mean the primary geographical focus of your services e.g., Local, Regional, Multi-Regional, National or International.

**Region** - What region of England are you based in?

**What are the top 3 postcodes of operation for the organisation's current activities?** We understand you might operate across more than 3 postcode areas, please provide the 3 postcode areas where the organisation works with the largest numbers of beneficiaries/customers.

**How many income streams does the organisation have?** This is the number of income streams that your organisation has contributing to its overall income. For example, if your organisation is selling a product to the public, as well as generating income through governmental contracts, it will have 2 Income streams.

#### **Primary and secondary income answer definitions –**

B2B = Business to Business (e.g., delivering a service/trading with another business directly),

B2C = Business to Customers (e.g., trading directly with the public such as selling products or a service to service users, general public, communities),

Business 2 Government contracts (e.g., work with local authority),

Business 2 Government grants (e.g., grants from your local authority)

Donations (e.g., receiving donations from the public)

**What was the organisation's turnover as per your last set of accounts?** This is your combined income figure from all sources as reported in your most recent set of accounts.

**Primary Beneficiaries** – We are aware that the organisation may serve several beneficiary groups. Please select the largest group you serve.

**Other Beneficiaries** – To select multiple options press the control button (ctrl) on your keyboard to select each group of people

**Primary Outcome Area** – We are aware that the organisation may have several outcome areas. Please select the outcome area that the organisation works mainly in.

**Other Outcome Areas** – To select multiple options press the control button (ctrl) on your keyboard to select each relevant outcome

***Is relevant lived experience present within the leadership of your organisation?*** Are there people with lived experience of the issues you are trying to address (e.g., homelessness, unemployment, mental health) through your service in positions of leadership?

***If yes, please give details. If no, please share other ways you involve lived experience if relevant?*** Please provide details of how you involve your beneficiaries and people with lived experience in the design and delivery of your services.

## **Section 4: Enterprise Status and Idea**

***Are you already trading?*** By trading we mean the sale of goods or services to generate income. Are you already bringing in income through this type of trading?

***What of the following best describes your primary mode of product and/or service delivery?*** We appreciate your work may fall under a few categories, but please choose which category best describes the overall support/services you provide.

***Does your organisation's provision specialise in supporting any of the following issues or type of mental health conditions?*** [you can tick up to a maximum of three, if applicable] We appreciate your work may fall under a few options, but please choose up to 3 that best describes the type(s) of mental health provision you provide.

***Stage of Enterprise Development*** – Please select the one that most accurately describes the stage your enterprise idea is at present:

**Ideation** – you are thinking about the skill set and asset base of your organisation but would like support to identify potential revenue models to help form a more concrete idea of what sort of trading activity you could develop to help diversify your income.

**Testing** – You have an idea which you are testing but are yet to start to put it in to action.

**Implementation** – you have developed a business model and have thought about the operational running and potential impact this could have but are keen to access further support to launch your idea effectively.

**Scaling** – You are currently trading effectively but are looking to grow this activity and need support to do so.

***Please provide us with a short description of what trading/enterprise ideas you have for your organisation.*** Here you can tell us what your product/service is, how it would be delivered and who your target customers are.

***Does your proposed venture offer meaningful training / employment pathways for beneficiaries?*** Will your enterprise idea provide employment/training opportunities to your beneficiaries? If you select yes, you can tell us more about these opportunities in the text box provided.

## **What happens after you have submitted your Stage One application?**

Your responses will be reviewed by a designated sector lead, and our aim is to provide you with a response to your application within 5 working days of the Stage One round closing. Organisations successful at this stage will be invited to complete a Stage Two Application.

## **What happens if you are invited to Stage Two of the application process?**

You will receive an email from us with a link to the next stage application form.

The aim of the application at Stage 2 is to:

- Understand more about the services you offer as an organisation
- Understanding your current trading activity
- Understand more about your enterprise idea and why you want to do this
- Understand what research you have carried out
- Understand what skills as an organisation you have already to carry out your idea
- Understand what policies your organisation has in place
- Establish what support you might need through EDP if successful

## **Need any help?**

If you have any questions when going through your Stage One application form that this guidance doesn't answer, please email: [enterprisedevelopment@sibgroup.org.uk](mailto:enterprisedevelopment@sibgroup.org.uk)