**Step Up Word Application Form**

You can use this form to draft your answers before submitting an online application form.

If you are having problems with the online application form or are unable to use it due to accessibility issues, you can use this form instead.

Before starting to draft your application, please ensure that you have read, understood and that you fully comply with the eligibility criteria. We also strongly recommend that you read and understand the guidance before applying.

**Section 1: About You**

Preferred Pronoun

First Name

Last Name

Email

Phone

Communication Preference (Email/Phone/Both)

Date of Birth

Address

Street

City

State/Province

Postal Code

Country

Local Authority Area

Please provide details of any accessibility requirements here

How did you find out about us?

* Please confirm that you understand and accept our obligations under the General Data Protection Regulation (GDPR) set out in our [Privacy Policy](https://www.firstport.org.uk/privacy-policy-2/).
* Please confirm that you have read and meet the eligibility criteria
* Please confirm you are aware that social investment is a loan, and you are comfortable taking on debt and repayment requirements

**Section 2: Your idea**

What is the name of your idea or Registered Organisation Name?

What is the address of the registered organisation?

Please provide us with a brief introduction of your idea/business (max 500 characters)

Which sector is most relevant to your idea?

* Arts and Creative Industries
* Community Centres and Halls
* Early Learning and Childcare
* Education, Training, and Employment
* Environment and Recycling
* Financial Services
* Food, Catering & Hospitality
* Health and Social Care
* Housing
* Information, Consultancy & Support Services
* Property, Energy, Utilities, and Land Management
* Retailing
* Sport and Leisure
* Tourism, Heritage and Festivals
* Transport
* Other (please specify)

Where are your main beneficiaries located?

* Aberdeen City
* Aberdeenshire
* Angus
* Argyll and Bute
* Clackmannanshire
* Comhairle nan Eilean Siar
* Dundee
* Dumfries and Galloway
* East Ayrshire
* East Dunbartonshire
* East Lothian
* East Renfrewshire
* City of Edinburgh
* Falkirk
* Fife
* Glasgow City
* Highland
* Inverclyde
* Midlothian
* Moray
* North Ayrshire
* North Lanarkshire
* Orkney Islands
* Perth and Kinross
* Renfrewshire
* Scottish Borders
* Shetland
* South Ayrshire
* South Lanarkshire
* Stirling
* West Dunbartonshire
* West Lothian
* Scotland Wide

What is the successful growth strategy that you want to repeat or scale?

How do you know it was successful?

**Section 3: Organisation Set Up**

**Organisation Details**

Is your organisation incorporated yet? (Yes/No)

Please enter your registered charity number (if applicable)

What is the legal set-up of your organisation or the intended legal set up if not yet incorporated?

How are finances managed and kept on track? (Does the enterprise have an accountant and/or accounting software? Is the enterprise able to provide quarterly management accounts? Who is responsible for finance?)

**Bank Details**

Account Holder's Name or Business Account Name

Account Number

Sort Code

**Organisation Set Up**

How many full time equivalent employees are there?

**Repaying the Loan**

Remember that if you are applying for £10k or under, you should aim to repay within 2 years – if over £10k, you should aim to repay within 5 years.

How are you intending to repay the loan (max 255 characters)?

Repayment start date

Repayment end date

Total amount requested

Please outline how you plan to spend the award

**Supporting Documentation**

* Cashflow (accepted formats .xls, .xlsx) Remember to include repayment plan
* Management Accounts - For period between last annual accounts (or start date) and present (accepted formats .pdf, .xls, .xlsx)
* Business Plan (accepted formats .doc, .docx, .pdf)
* Annual Accounts – Most recent annual accounts, if any (accepted format .pdf)
* Constitution- If your organisation is a SCIO or other form of organisation where your constitution is not available online (accepted formats .doc, .docx, .pdf)
* Growth Strategy Upload- Evidence that your growth strategy is or has previously been successful (accepted formats .doc, .docx, .pdf, .xls, .xlsx)

**Section 4: Board Members and Key Staff**

Please complete the following for each board member and key staff member. By submitting their contact details, you confirm that you have obtained permission for Firstport to contact them for the purposes of undertaking ID checks and that they have read and understood Firstport's data policy.

First Name

Last Name

Email

Role

Skill Set

**Section 5: Expenditure**

How are you planning to spend the money? Please enter all items of expenditure required. Just to remind you, you may need to supply evidence of spending, e.g. receipts, payroll etc.

Description of item of expenditure

Value of item of expenditure

**Section 6. Equal opportunities**

**What is your sex?**

1. Female
2. Male
3. Prefer not to say

**Do you consider yourself to be trans, or have a trans history?**

1. Yes
2. No
3. Prefer not to say

If yes: If you would like to, please describe your trans status (for example non-binary, trans man, trans woman)

**Which of the following options best describes your sexual orientation?**

1. Straight/Heterosexual
2. Bisexual
3. Gay or Lesbian
4. Other sexual orientation
5. Prefer not to say

**Age band**

1. 16-25
2. 26-35
3. 36-49
4. 50-59
5. 60+

**Do you identify as disabled?**

1. Yes
2. No
3. Prefer not to say

If yes, does this condition or illness / do any of these conditions or illnesses affect you in any of the following areas? (Tick all that apply):

* + Vision
  + Hearing
  + Mobility
  + Dexterity
  + Learning, understanding, or concentrating
  + Memory
  + Mental health
  + Stamina or breathing or fatigue
  + Socially or behaviourally
  + Other

**What is your ethnicity?**

1. White
2. Asian/Asian British
3. Black/Black British
4. Mixed or multiple ethnic groups
5. Other ethnic group
6. Prefer not to say

Ethnicity Details:

**What is your employment status?**

* Self employed
* Part-time employed
* Full-time employed
* Student
* Looking after home or family
* On a government training scheme
* Unemployed
* Retired
* Unable to work due to health or disability
* Prefer not to say

**What qualifications do you hold (if any)?**

* Degree or Postgraduate degree
* None
* levels/GCSEs, S levels, Highers
* Professional qualification
* Self-taught
* SVQ
* Prefer not to say

**Does the leadership of your organisation identify in the following areas? By the leadership of the organisation, we mean that the majority of the key decision-makers have a shared identity. As an indication, this might be 75% or more of the Board of Trustees/Management Committee AND 50% or more of senior staff identify as from a community or characteristic (Tick all that apply):**

* + Communities experiencing racial inequity
  + Faith communities
  + Migrants
  + Disabled People
  + Older people
  + Children and young people
  + Women and girls
  + LGBT+ People
  + People who are educationally or economically disadvantaged

**Does your organisation target or intend to benefit specific groups that commonly or historically experience structural inequity? Please select any category that you anticipate that the majority (75% or more) of people supported or benefiting will identify (Tick all that apply):**

* + Communities experiencing racial inequity
  + Faith communities
  + Migrants
  + Disabled People
  + Older people
  + Children and young people
  + Women and girls
  + LGBT+ People
  + People who are educationally or economically disadvantaged

Please provide details if your organisation targets people with other types of lived experience that are not included above: