

Social Scale-up Grant - Self-Assessment Survey

The following questions will help you determine if your organisation is eligible for a Social Scale-up Grant and is:

- A strong applicant; OR
- A high-potential applicant; OR
- Unlikely to be shortlisted for the 2018 Round of Social Scale-up Grants.

You can take this **Self-Assessment Survey** anytime of the year.

Applications for the Social Scale-up Grant will **OPEN in February 2018**.

If you are applying on behalf of a larger organisation that operates a social enterprise initiative through a subsidiary, please answer for the social enterprise subsidiary only.

ELIGIBILITY QUESTIONS

Please answer the following four **eligibility questions** relating to your social enterprise:

1. Does your social enterprise have a proven model for creating jobs and/or employment pathways (training, qualifications or work experience) for Australians (in Westpac Foundation's target groups) who face barriers to employment, or are often excluded from the mainstream job market?
2. Has your social enterprise supported 10 or more people facing barriers to employment (within Westpac Foundation's target groups) into an Award wage paying job (casual, part-time or full time), or employment pathways towards a job?
3. Is your social enterprise registered and operating in Australia?
4. Does your social enterprise have Deductible Gift Recipient (DGR) Item 1 Status?

If you have answered **YES to all of the above eligibility questions**, please continue the survey and answer the qualifying questions.

If you have answered **NO to any of the above questions**, your social enterprise is **not eligible** for the 2017 Round of Social Scale-up Grants.

If you have DGR Item 1 status you could consider applying for a **Westpac Foundation Community Grant** – see our web site for application details.

QUALIFYING QUESTIONS

Please answer the following nine **qualifying questions** relating to your social enterprise:

1. Has your social enterprise been operating for 18 months or more?
2. Is your social enterprise looking for funding to achieve both the scaling-up of its operations and increasing its social impact? (i.e. increasing the percentage of gross annual income it earns from trading AND increasing the number of participants who face barriers to Award wage paying employment / employment pathways).
3. Does your social enterprise have a robust business plan outlining its strategy for at least the next 3 years (including financial forecasts out to FY2020/2021)?

4. Is your social enterprise's gross annual income for this financial year (FY2016/2017) expected to be \$300,000 or more? (Please INCLUDE income from government grants, donations, fundraising or philanthropic funding AND the sale of goods and services).

5. Comparing your current and projected financial forecasts, will the gross annual income of your social enterprise have increased by \$300,000, or more, over the next three years, i.e. by FY2019/2020? (Please INCLUDE income from government grants, donations, fundraising or philanthropic funding AND the sales of goods and services).

6. Is the income from trade generated by your social enterprise at least 50% of the gross annual income expected for this financial year (FY2016/2017)? (i.e. income from trade as generated from the sale of goods and services, EXCLUDING income from government grants, donations, fundraising, or philanthropic funding).

7. According to your financial forecasts for FY2020/2021, will the income from trade generated by your social enterprise grow to be at least 75% of its gross annual income? (i.e. income from trade as generated from the sale of goods and services, EXCLUDING income from government grants, donations, fundraising, or philanthropic funding).

8. Can your social enterprise demonstrate that it employs an experienced management team (with relevant experience in the business operations of the social enterprise and the social support elements provided to employees), has an experienced Board and is well governed?

How many **QUALIFYING** questions did you answer **YES** to?

- YES to six or more qualifying questions
- YES to five qualifying questions
- YES to four or less qualifying questions

If your Social enterprise answered **YES to six or more qualifying questions** and **YES to all the eligibility questions**, your social enterprise is likely to be a **strong applicant** for the Social Scale-up Grant.

Applications will open in February 2018.

If you answered **YES to five qualifying questions** and **YES to all the eligibility questions**, your social enterprise may be a high-potential applicant and therefore be eligible to access non-financial support through our More than Money program.

Applications will open in February 2018.

If you have answered **YES to four or less qualifying questions**, your social enterprise **should not apply for the Social Scale-up Grant**, at this stage.

Thank you for taking the time to complete this survey, please contact the Westpac Foundation at westpacfoundation@westpac.com.au for further information.