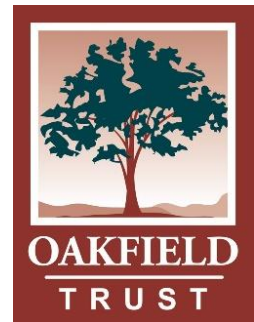


Get Started Grant

Guidance for Applicants



Introduction

Get Started grants help new social entrepreneurs in Ireland to start up their businesses and can help pay for costs associated with this up to a maximum of €5,000.

Who can apply?

You can apply for Get Started if you have an idea for a social enterprise but need some funding to get it up and running. There are no restrictions around ideas, but it should be new rather than a continuation of something already existing. We also prioritise applications from individuals we have not previously awarded.

Section Two: Eligibility Checklist

Applications must meet the following eligibility criteria:

- The applicant is aged 16 or over:
- Your idea based in Dublin or Ireland.
- Does your idea involve politics or the advancement of religion.
- The enterprise is an independent organisation and not the project or subsidiary of an existing body.
- If it is not completely independent (for example if it has a parent company) – you must give details of this. If you do (or will) receive funding from that parent company, you must give us as much detail about this as possible.
- The enterprise is in the early stages of development – i.e. the 'idea' or 'start-up' phase – and has not begun trading on a regular basis.
- The idea does not form part of the applicant's current employment.
- If the enterprise requires premises to start trading, the applicant must have identified a property and be able to confirm an agreement in principle.

If the application does not meet these criteria, it will be ineligible for Oakfield Trust funding.

If you have any questions about eligibility that aren't answered below, please contact us via email at gebbs@oakfieldtrust.ie or via phone on 086 1279 362.

Eligibility FAQs

Q: My enterprise will be trading across the whole of Ireland. Is this eligible?

There are no geographical restrictions on trading. However, we prefer, the majority of the social impact to be delivered in Dublin and then beyond.

Q: I've run an income-generating pilot – does this count as trading?

If you have already conducted brief activity to test the market for your idea, but are **not** regularly trading (e.g. you may have run a pop-up stall, or a trial workshop), then your idea is still likely to be eligible for Get Started funding, and the results of this activity could in fact strengthen your application. However, if you have been regularly trading for some time, and this is ongoing at the point you apply, it is more likely that you have moved past the early stage that Get Started funding supports. In this case, you should contact us for further advice on the other support we can offer for later stage enterprises.

Q: I've already set up as a sole trader/private company limited by shares. Am I ineligible for funding?

Oakfield Trust funds individuals as opposed to organisations, so you can still apply whether or not you have set up a legal entity for your project, and regardless of the type of entity you have chosen. However, at assessment, we will want to know why you have chosen to go down a particular route, and whether you are committed to sticking with it.

Setting up as a sole trader or private company limited by shares is more common in traditional commercial organisations as both of these models allow profits and assets to be paid out of the business to private individuals or bodies. A key feature of a social enterprise is that it does not allow this, and instead reinvests profits back into achieving its social aims. Even if it needs to close down, any remaining assets (after debts are paid) must be passed on to another social enterprise or charitable organisation – usually with similar aims. This feature is usually reflected in its choice of legal model.

If it is important to you that your organisation can continue to distribute profits or assets, then your idea is unlikely to receive Get Started funding and we would be more likely to point you towards support on setting up a standard commercial business.

However, we are aware that many new social entrepreneurs initially register as sole traders or private companies limited by shares for other reasons – perhaps this is the model that seems easiest, or most familiar - or they want to claim their social enterprise name. If this is the case, but you are committed to setting up a social enterprise, we can help provide guidance on changing to a more appropriate model (and may even be able to fund costs associated with this if your application is successful). In such cases, an offer of funding might be conditional on you making this change.

In any event, we would always strongly encourage applicants to base their choice of legal structure on what is best for the business, as opposed to being influenced by eligibility criteria for any particular funding stream – via Oakfield Trust or any other source. Please contact us if you would like further advice on this subject.

Q: What is 'direct social impact'?

When a social enterprise carries out work or provides services itself for the good of its beneficiaries (this could be individuals, a community, or even the environment) we define this as 'direct social impact'. On the other hand, when a social enterprise provides services to other **organisations**, who then go on to do the work with beneficiaries, this would be defined as 'indirect social impact'.

For example: an enterprise providing counselling services to a vulnerable group would be seen as direct social impact; an enterprise providing counselling training to a charity who then provides this counselling to their beneficiaries would be seen as indirect social impact.

Q: What type of enterprise typically requires premises to start trading?

Most bricks-and-mortar retail enterprises, community cafés, or any community-focused enterprise which requires a permanent base of operations as part of their commercial/social strategy.

Now that you've confirmed your eligibility, it's time to move on to the rest of the form.

Section Three: Personal Details

This is where you fill out your basic contact details.

If you have any accessibility requirements, please tick the box. Oakfield Trust endeavour to make the assessment process as accessible as possible, so it's important for us to know if you have any requirements.

If you are developing the idea with someone else, please give further details. If you would like this other person to attend the assessment with you, that can be accommodated, but please remember that we fund individuals, and so you will be the main point of contact.

Section Four: Your Social Enterprise

If you don't have a name for the proposed enterprise, that's fine – just put n/a.

If you haven't incorporated the social enterprise yet, that's also fine. If you have, please let us know the legal structure and the charity/company number if applicable. You can find this number on the [Charities Register](#) (charities) or the [CRO](#) (companies).

Some enterprises work across multiple sectors, but there should be a main sector which fits the enterprise in the drop-down list. If there isn't, please select the closest fit.

As above, some enterprises provide social impact across a range of geographical areas. If your beneficiary group is not localised, please select 'Ireland-wide'.

Introduction

The introduction to your idea / social enterprise should be brief and factual. The following points should be covered:

- What services/products the enterprise will offer.
- How the enterprise will generate an income.
- How the enterprise will provide social impact.

Tell us about yourself.

We're interested in what makes you the right person to take this idea forward. Passion absolutely counts, but it's also worth considering the following:

- Do you have personal / lived experience of the social problem you're trying to address?
- Are you qualified to do it? If you're offering a specialised service, do you have the professional qualifications required? If you're working with vulnerable people, do you have professional/personal experience? Do you have business experience?
- What kind of support network do you have? Do you have proposed co-directors / trustees? What skills do they have? What skills do you lack?

You certainly don't have to answer all of the above, but you should show that you have considered some of the points.

Please tell us about the business potential of the idea.

Get Started applicants should have considered the basic business potential of their social enterprise.

- Is there a market for the enterprise's services/products?
- Have you identified your competition? Are there other organisations providing similar services/products? Are there other organisations providing different services/products, but potentially tapping into the same market?
- Have you established a pricing structure for your services/products? Are your customers willing to pay these prices?

Again, you don't need to cover everything here, but the above may be helpful to consider.

Please tell us more about the social problem you are trying to solve.

- What difference are you making? Who are your beneficiaries? What impact will you have on them? How will you measure the impact?
- Is there a need for the enterprise's social impact? What is the scale of the need?
- Have you identified your competition? Are other organisations providing similar social impact or working with the same beneficiaries?
- If you require third-party referrals (i.e. through schools, local authorities, GPs), is the process established in principle and have key contacts been made? If not, how do you plan to make these contacts?

Please tell us how you would use any surplus profits.

By 'surplus profits', we mean income left over after all the monthly bills are paid. Some of this is likely to go back into the business to fund growth. Be aware that commercial organisations tend to reinvest surplus profits to boost trading; social enterprises must show that some of the surplus profits will be reinvested in delivering social impact, whether that is through the core services or other service delivery.

If you were successful with your application, what are the key steps you would take in terms of getting the enterprise up and running?

Get Started funding is usually spent within a year of the award, so having a clear plan of how you intend to proceed is important. What are your priorities in the first six months? What are your milestones? Where might you need further guidance and support?

Supporting Documents

Pitch Document

Your pitch document should be submitted as a **Word document** or **PDF**.

Ideally it would be 1 page long and not exceed 1 page.

You should approach your pitch document as if you are summarising your application for a reader who will not have access to your application form, business plan, or financial information.

A popular approach is to include a short paragraph on each aspect below:

- The background of your social enterprise, its core functions and why it exists
- Trading track record (if applicable) and how your organisation will generate income
- Your social aims and how the organisation will generate social impact
- Your highlights and successes so far
- What you need the Start Up award for
- Why you should be funded

Business Plan

Your business plan must be submitted as a **Word document** or **PDF**.

It must not exceed 3 sides of A4. It should be minimum two pages.

We appreciate that business plans come in all shapes and sizes, but we strongly recommend you use the headings and associated guidance below to ensure you cover all the information we need to assess your application. We think it will make it easier to get together. We understand that for some very new social enterprises it might be difficult to get into specifics but just do the best that you can.

Section 1 of Business Plan – Vision

Provide a concise statement of your vision/ultimate goal for the enterprise. Try to present a clear picture of what you would like your enterprise to accomplish. This should act as the foundation for all your strategic planning and be reflected in your Mission and Objectives (see: [Section 4](#)).

Section 2 of Business Plan – Background

Provide an overview of your enterprise, briefly addressing the following points:

- **An outline of the social problem you are tackling.**
- **Brief information on your beneficiaries.** These are the people you are trying to help and who are affected by the social problem detailed above.? How many people have you helped so far?
- **Evidence that your beneficiaries’ needs are unmet.** - your own research, reports from agencies, government stats, and demand for your existing services as evidence.
- **A summary of the activities you have delivered so far.** Successes and milestones, both in terms of delivering social impact and developing your income streams.
- **A summary of how a Scale Up award would allow you to expand on what you already do.**

The other sections of the business plan will provide you with the opportunity to expand and provide more detail, so this section is for overview purposes only.

Section 3 of Business Plan – Leadership

Provide details about yourself and other key people involved in your enterprise. You should include information about:

- **Your relevant skills and experience.**
- **The skills and experience of any other key people involved in your enterprise.** Board members, mentors or key supporters, as well as front-line service delivery.
- **Key partnerships and external support.** Any connections you have made with individuals and bodies that will be important to its continued success.

Section 4 of Business Plan – Mission and Objectives

Your mission statement should be a concise summary of your overall aims. It should outline why you exist, capture the soul of the organisation, inspire change and stimulate progress. For example:

Mission

- To improve the lives of the children who use the centre through:
 - o Improving the parenting skills of the parents using the centre
 - o Increasing children’s self-esteem
 - o Helping parents give each other support

The objectives are the practical activities that you use to achieve your overall aim. For example:

Objectives

- Objective 1: to provide workshops, information and advice on parenting skills.
- Objective 2: to provide opportunities for play, drama, and dance.
- Objective 3: to run a drop-in centre with a play area.
- Objective 4: to organise outings for parents.

Both your Mission and your Objectives should tie into your vision statement in **Section 1**.

Section 5 of Business Plan – Products and/or Services

Provide details about the products and/or services your enterprise offers. These should relate to the Mission and Objectives outlined in **Section 4**.

- Be clear about which products/services you are already offering.
- Any new products/services you will offer in the event of a successful application.
- New targets you will set in the event of a successful Scale Up application.

Section 6 of Business Plan – Operations

The operations section tells us about staff, premises and other resources required for your enterprise. It should also give us an overview of your plans for the next year and individual responsibilities.

- **Staff.** Briefly outline the number of staff required (including any existing employees), job remits, and salary requirements.
- **Resources.** For example premises, vehicles, furniture, and IT equipment. Tell us about the resources you already have or that you will need to help you deliver your products/services, as well as any additional resources you require.
- **Time plan.** What is your timetable for the next 12 months? Tell us briefly your key aims or milestones over this period and when you would expect to achieve them. These should relate to objectives as detailed in **Section 4**.

It is important that **Section 5** (Products and Services) and **Section 6** (Operations) reflect each other in terms of what is provided by the enterprise and what is required to provide it. We should also see both sections reflected in the submitted cashflow projections.

Section 7 of Business Plan – Market Analysis

If possible, provide evidence of a market for your products/services. You should show a **paying market**, not just a **social need**. It needs to be business that can make money.

In this section, you should aim to include the following:

- **Any statistics** which shows why you believe your products/services have a market.
- **An overview of your customers – for example:**
 - o Who are your customers to date? Any regular customers or contracts?
 - o Do you have plans to target new customers in the future?

- **Details of competitors – for example:**
 - Who else provides products/services to the customers/beneficiaries that you have identified?
 - How busy are they? How does this impact on your market?
 - Do they offer the same or a different range of services?
- **Briefly explain your competitive advantage.** Why will people use your enterprise as opposed to your competitors?
- **Provide a very brief summary of your pricing policy.** What will you be charging for your products/services? How have you calculated this?
- **Very briefly, give examples (if any exist) of how similar ideas have worked elsewhere.** Outline successes and failures of them and what you have learned.

Section 8 of Business Plan – Social Impact

Provide information about the social impact you will delivering through your enterprise.

- **Explain the social impact you will deliver. For example:**
 - How will your social enterprise make a difference to your beneficiaries?
 - How will it help improve quality of life for individuals affected by a particular problem or issue?
 - Will it create jobs or relieve poverty?
 - Will it improve the environment?
 - Include facts and figures to evidence what you have achieved.
- **Explain how you would monitor the social impact of your enterprise.**
 - Identifying the social impact of your work is vital in order to communicate the value of what you do. Explain the systems and approaches you'll use for capturing social impact or change. For example:
 - Will you collect baseline information to record changes that result from your work?
 - Will you set up a series of indicators that are regularly monitored?
 - Will you ask people to complete questionnaires?
 - Will you keep records on the people you work with?
 - How will you track what happens to people you work with?

Cashflow Forecast Document

Your cashflow projections should show us how you see your business progressing over **the first year** in terms of the income streams you plan to develop and the expenses you expect to incur.

These projections must be presented in our Excel cashflow template (available as a download from our website – the Get Started version). We understand many applicants have already compiled their own cashflow projections in their own template, but you **must use our template**.

Please submit the document as an Excel spreadsheet, not a PDF of the same.

You should also include **key assumptions** – notes to explain your calculations – in the space provided at the bottom of the template. Feel free to be as detailed as you can here. This section of the document is vital in helping us understand how you have arrived at your figures and your forecasts.

Section Five: Directors / Trustees

The Directors or Trustees involved in the organisation.

Section Six: Disclosures and other Details

These are important questions but not all are mandatory.

Section Seven: Budget

Here you need to itemise your funding request, ideally under categories of spend. This request will form the basis of your award if you are successful.

Eligible Costs

Get Started funds can be used for a wide range of costs associated with starting up the enterprise. While individual applications vary, typical costs at this stage include:

- **Legal fees for setting up a legal entity.** Choosing which type of legal entity is a complex question and we would recommend researching this point or getting professional advice before making a decision – but usually this means incorporating as a company limited by guarantee (perhaps with charitable or community interest company status) or a similar format.
- **Rent for premises/office space.** This should be a specific sum based on discussions with the landlord. You should also state how many months this rent will cover, e.g. Rent (3 months): €1,300.

- **Venue hire.** If your enterprise delivers events or regular pop-up services, Get Started funding can be used to cover venue hire.
- **Utilities, including phones.** As with rent, you should ideally give us an idea of how many months the request will cover.
- **Website, including domain registration and website design.**
- **Branding, logo design and marketing materials/stationery.**
- **Insurance costs.**
- **Accountancy costs.**
- **Equipment.** Please note: while we do fund equipment for social enterprises, this will be assessed on a case-by-case basis, and should not be the sole funding requirement.
- **Laptops.** In exceptional circumstances where the applicant has limited access to a laptop, the panel will consider funding a laptop to a maximum of €300. If the applicant requires a higher specification laptop for design/CAD work, the panel may consider funding a contribution to this cost, again to a maximum of €500.
- **Software.** Usually accountancy packages, but we have funded more enterprise-specific software, such as design or teleconferencing packages.

While we don't require quotes at application stage, the more specific your costs, the better.

Ineligible Costs

- **Retrospective costs.** Get Started funding cannot be used to cover expenses already incurred and paid for.
- **Wages.** If you have already started trading and require funding for wages, you may be eligible for the Build It fund.
- **Training/qualifications to deliver core services.** For example, if you want to run a social enterprise teaching yoga, we cannot fund the training to become a teacher. You should already have the qualifications to deliver core services. We can sometimes fund top-up training.
- **Business consultants/coaching.** There are many supports from external sources for things like this, so unfortunately, we would not fund external business coaching or advice.
- **Meeting/subsistence costs.** This is typically difficult to evidence as business-related. While venue hire is covered (see: **Eligible Costs**), other meeting costs such as refreshments, etc., cannot be covered.
- **Permanent redevelopment of property.** Premises-dependent social enterprises may wish to develop the property to make it fit for purpose, but we are unable to fund refurbishment of a privately-owned property. Get Started funding may be used to pay for portable or temporary fittings, however.
- **Livestock.** We are unable to fund livestock of any type.

Other Sources

If your funding requirement is over €5,000 and you plan to use money from other sources, you should detail this in the space provided.

Eligible Costs FAQs

Q: I haven't chosen a legal structure for the enterprise yet. Do I still need to put in legal / incorporation fees in the request?

You don't necessarily need to know which legal structure you want to go for at this stage, but there should still be an intention to incorporate at some point within the span of the award. It is up to you whether you seek professional advice to help you with this, and whether you want to apply for funding to cover this cost.

Q: I need to pay someone to design my website / branding – does this count as wages?

No, unless you would be looking to contract that person as an employee. Paying someone to provide services **to** the enterprise - such as design - would be eligible. Paying someone to work **for** the enterprise and help deliver its services would not.

Q: I have already set up the social enterprise and all I need is equipment. Will this be eligible?

Some social enterprises have already sourced start-up funds from elsewhere (which should be detailed in the 'Other Sources' space) but have a larger initial funding requirement. As per the eligible costs above, we will assess this on a case-by-case basis.

Q: If I submit a budget and need to change it at a later date, is that possible?

We understand that requirements may change between the submission of the application and the assessment, so there will be opportunities to amend your budget later.

Section Eight: Bank Details

Here you need to provide us with your bank details to ensure swift payment if you're successful.

Bank Account Name

This should be the account holder's name as it is presented on your bank statement, **not** the bank/building society name.

IBAN Number

The IBAN consists of up to 34 alphanumeric characters. In Ireland, the standard length of an IBAN is 22 characters. Example: IE64IRCE92050112345678

BIC Code

A BIC (Bank Identifier Code) is often called SWIFT Codes and can be either 8 or 11 characters long. For example BOFIE2D

Section Nine: Equal Status

We only use equal opportunities information for statistical purposes and it will not form part of your application assessment.

If there are any questions that you would prefer not to answer, please leave the field blank.

Section Ten: Data Retention Declaration

Section Eleven: Data Protection and Submit

And you should now be ready to submit! If you've missed any required fields, the form should let you know. If you're having issues submitting your application, please email us at gebbs@oakfieldtrust.ie or give us a ring on 086 1279 362.

What Happens Next?

Stage 1.

Submit your application online to introduce your social enterprise or your idea. If your application is eligible, after the closing date it will move to Stage 2.

Stage 2.

After the closing date all applications will be assessed. We will either let you know of our decision or ask for more information.

Stage 3.

If you are unsuccessful, we will let you know ASAP by email. If your application is successful, we will email you the amount of funding you are approved for and inform you of any conditions that need to be satisfied to draw down the funds.

In the event that your application is not successful, we will notify you by email with panel feedback.

Any Questions?

If you have any queries at all or would like to speak to us before making an application, please give us a call on 086 1279 362. Good luck!