*We strongly encourage all potential candidates to carefully read our selection criteria before completing an application. Please note that government/public sector personnel, research institutions, and foundations that provide financial or technical support to social enterprises will not be considered.*

**Schwab Foundation Application Form**

**This information will be treated confidentially and used only for the purpose of evaluation for the Schwab Foundation network. If you have completed the Social Reporting Standard (SRS) (or a similarly comprehensive reporting standard) within the last 12 months, you may submit the SRS in place of this application.**

**IMPORTANT - The following documents must be submitted along with the application form:**

* An updated copy of the applicant’s CV or resume
* Financial statements (income statements and balance sheets) for the last 3 years
* A copy of the most recent annual report
* Any available 3rd party evaluation of your organization
* An organization chart or staffing chart with reporting lines
* Links to videos of recent public talksyou have given, or current articles or blogs you may have written
* E-mail addresses of two references. Indicate their name, title, and organization, as well as a brief one-line description of the nature of your professional relationship (ideally your references can testify directly to your organization's activities and impact, so a funder, government partner, or third party expert would be ideal).

**General Information**

Date of Application (DD/MM/YY): 

Applicant (Founder / Chief Executive) Name: 

How much of your time do you invest in this organization: 

Nationality: 

Birth Date (DD/MM/YY): 

Social Enterprise Name: 

Year Established: 

Address of Headquarter Office: 

Other Offices (City, Country): 

Website: 

Telephone: 

Mobile Phone: 

E-mail Address: 

Personal Assistant’s E-mail Address: 

Legal form of your organization (not-for-profit organization, private company, public company, etc.):



Sector(s) (e.g. microfinance, health, education, energy):



**Background: The Social Problem and Your Solution**

1. Describe the specific social or environmental issue(s) that your organization is trying to solve. Wherever possible, include statistics, figures, and facts to explain the relevancy and scale of the problem.

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1. What is your vision or what do you intend to achieve? What is your organization’s strategy? How do the main activities of your organization support this strategy? What services and/or products do you offer?

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1. Define and quantify your target population (the beneficiaries or clients) for each of your services and/or products. Also, what groups are indirectly affected by your strategy and activities (family members, volunteers, etc.)?

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**Innovation and Transformative Change**

1. How do your strategy and activities create transformative change in society?

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1. Who else addresses the identified problem and/or provides similar products/services? Please list those organizations below. If there are no previous attempts at solving the problem, please explain why not.

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| Entity | Geographic Area | Differences in Approach or Strategy |
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**Financial and Organizational Sustainability**

1. Are your financial statements audited?
2. What are your main revenue streams?

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* 1. Who are your top three financial supporters or investors?

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* 1. What fees do you charge for your activities, products, and/or services?

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1. Please provide the following data (financials in either USD or EUR).

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| --- | --- | --- | --- | --- | --- |
| **Select currency**  **EUR  USD** | **2013 (estimate)** | **2012 (estimate)** | **2011 (actual)** | **2010 (actual)** | **2009 (actual)** |
| **Earned Income** |  |  |  |  |  |
| **Grants** |  |  |  |  |  |
| **Government Support** |  |  |  |  |  |
| **Total Revenue** |  |  |  |  |  |
| **Total Costs** |  |  |  |  |  |
| **Profit (Loss)** |  |  |  |  |  |
| ***Current Assets*** |  |  |  |  |  |
| ***Current Liabilities*** |  |  |  |  |  |
| ***Total Assets*** |  |  |  |  |  |
| ***Debt*** |  |  |  |  |  |
| ***Equity*** |  |  |  |  |  |
| **Number Direct Beneficiaries/Clients** |  |  |  |  |  |
| **Number Indirect Beneficiaries/Clients** |  |  |  |  |  |
| **Number Full Time**  **Paid Employees** |  |  |  |  |  |
| **Number Volunteers** |  |  |  |  |  |

1. Please describe the nature of any significant partnerships you have, and how they contribute to your organization’s social impact (i.e. partnerships with companies, government, international organizations, NGOs, academic institutions, financiers, foundations).

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1. Please describe the functions of your supervisory body (board) and list the members. Are members compensated? How often does the supervisory body meet?

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1. Please describe the specific roles and responsibilities of the senior management team (i.e. top 3-4 staff).

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1. What is the ratio between the highest paid full-time employee and the lowest paid full-time employee in your organization? Feel free to provide additional context for this ratio.

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1. If you have owners or shareholders, please list the largest 3-5 owners and the percentage they hold. Explain the voting rights.

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**Impact and Monitoring Effectiveness**

Given the complexity of social and environmental problems, we recognize that attempts to measure impact are costly and imperfect. Nevertheless, we invite you to provide an honest assessment of your evaluation methods and how they can be improved. Please keep your answers as concrete as possible and draw on specific examples.

1. What are the quantifiable metrics or indicators you use to measure your impact (e.g. number of customers, number of tons of carbon emissions eliminated, number of people who have found and retained jobs after receiving vocational training, etc.)?

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1. How do you collect this data (tracking sales, anonymous surveys, third party evaluations, etc.)?

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1. What results do the data show?

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1. How do you use the information you collect to improve your product or service offering?

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1. What outcomes are you able to demonstrate (e.g. economic costs saved by society, reduced pollution, etc.)? Even if you are not able to prove causality between your activity and these observed effects, please explain why you use certain indicators to derive conclusions regarding the effectiveness of your activity.

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**Reach and Scope**

1. Which products, services, and/or activities do you offer in which country/region(s)?

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**Scalability and Future Growth Plans**

1. Which of the following method(s) best describes your growth strategy:

*****Open distribution model:* Your organization provides consulting to third parties to proliferate the solution.

*****Franchise model*: You collaborate with contracted licensees who are responsible for implementing the activity locally using your brand, intellectual property, etc.

*****Network model*: Your products/services grow through collaboration with other organizations.

*****Branch model*: Your growth is based on opening new branches by hiring additional staff.

*****Other*: (Please specify)

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1. Please describe future expansion/replication plans and the targeted timeframe (e.g. new products/services you are planning to add to your existing offering, and/or new regions you are planning on expanding into).

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1. What external factors (i.e. social trends, policy changes, new technologies) might affect your organizational strategy? How are you factoring these risks and opportunities into your expansion plans?

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1. What are your interests in joining the Schwab Foundation network? What would you bring and gain from being part of the community?

**The Candidate**

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1. In addition to the work you do through your social enterprise, how would you like to contribute to advancing the social innovation sector?

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1. Please list the most recent prizes you and/or your organization have been awarded.

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1. Languages

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|  | **Mother Tongue** | **Converse with Fluency** | **Converse with Difficulty** | **Not at all** |
| **English** |  |  |  |  |
| ***Other:*** |  |  |  |  |
| ***Other:*** |  |  |  |  |
| ***Other:*** |  |  |  |  |