Flexi-Grant Guidance

A Guide to support applicants using Flexi-Grant

January 2024

Ocean Community Empowerment and Nature

UK International Development

Partnership | Progress | Prosperity

Contents

1. Purpose of this guidance

Flexi-Grant® is an online application portal used by a range of government and independent grant bodies worldwide. **All applications to OCEAN must be through the Flexi-Grant portal https://ocean.flexigrant.com/**.

This guidance note provides practical information on how to use the Flexi-Grant application portal to apply for OCEAN projects. It is structured in the following sections:

- How to register, start, and complete an application form
- Frequently Asked Questions
- If you continue to experience issues with Flexi-Grant

This document contains information about how to use Flexi-Grant only. Additional guidance relating to the content of your application, required templates and a word version of the application form are available via:

- Flexi-Grant - https://ocean.flexigrant.com/
- OCEAN website https://oceangrants.org.uk/

We strongly recommend reading all sections of this guidance note, as well as additional guidance materials such as the Guidance Note for Applicants and the Finance Guidance before starting your application.

It is also advised that you initially develop your application using the offline Word version of the application form available, before copying and pasting the text into Flexi-Grant. **Please be aware that application cannot be submitted using the Word Version and must be submitted via Flexi-Grant.** The word version of the file is available for drafting purposes only.

Contact us

If, after reading this guidance, you continue to experience issues with Flexi-Grant and you require any assistance, contact us on helpdesk@oceangrants.org.uk.

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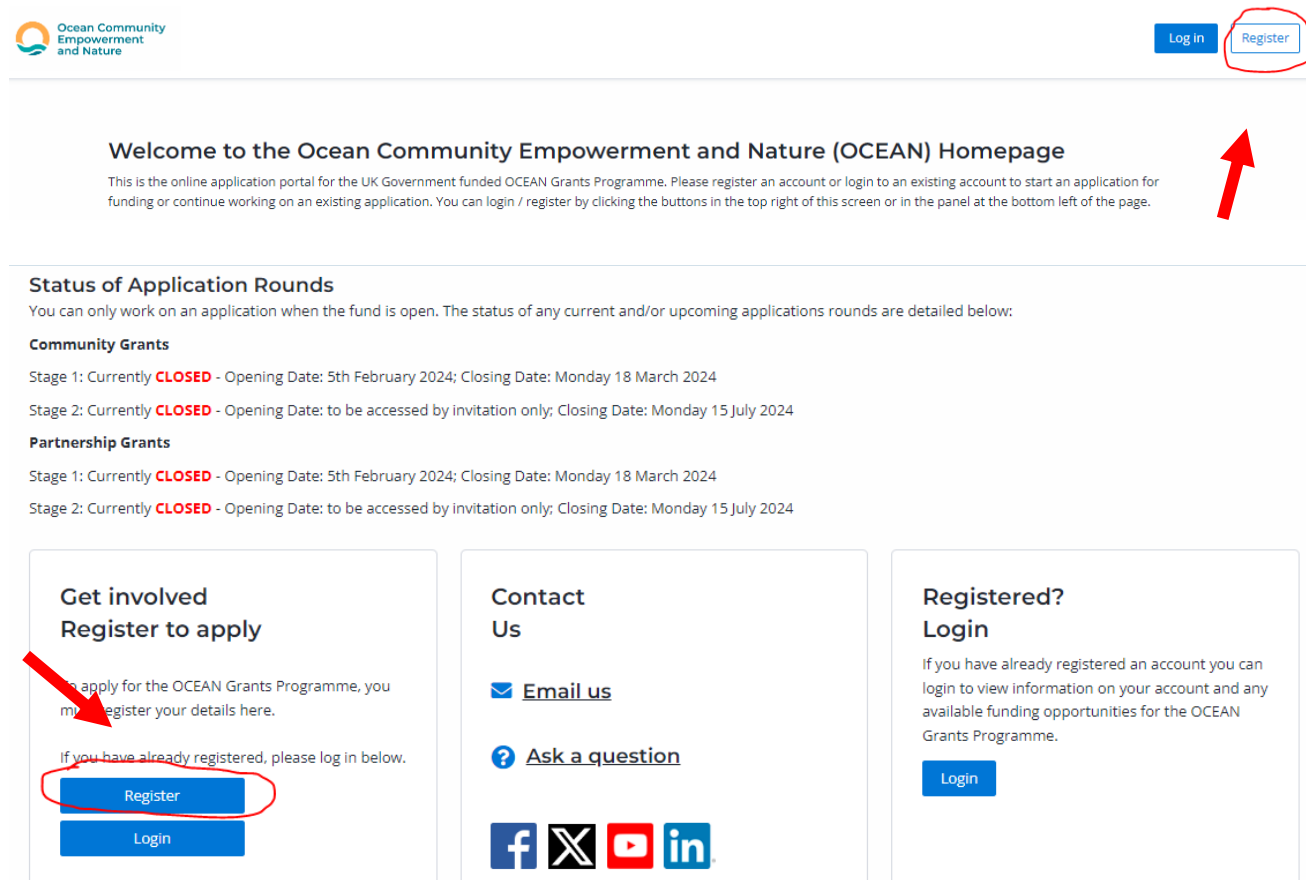
2. How to register, start, and complete an application form

2.1. How to register

To submit an application to OCEAN, you need to register on Flexi-Grant. To do this, **go to https://ocean.flexigrant.com/ and click on 'Register'**.

Click the 'Register' button circled in red below to register your account (you will find one button at the top-right and one button at the button-left of the main page).

To start the registration process, **you will need to read and agree to the terms and conditions by clicking 'Yes'** when prompted (make sure to scroll to the bottom of each page).

You will then be asked to input your name, email and password to register an account.

Once you have registered, **you will receive a confirmation email with a link to activate your account**. Make sure to check your junk folder if you have not received this.

Once your account is active, click on **'Log in' and enter your login details to start your application**. Either button circled in red below will enable you to log in (you will find one button at the top-right, and one button at the button-left of the main page).

If you forget your login details at any time, please contact helpdesk@oceangrants.org.uk and a member of the Grant Administration Team will be in touch to help unlock your account and reset your password.

IMPORTANT: The Flexi-Grant account you create will be the Flexi-Grant account holder. This will be the same as the lead applicant (unless you reassign this permission – see 2.6). The Flexi-Grant account holder / lead applicant will be the **only login that can submit your application** and will be the **sole point of contact for the duration of the application** (unless you notify NIRAS of a change – see 4). **We strongly recommend the Flexi-Grant account holder / lead applicant has regular email access and/or shares the login details if necessary.**

2.2. General guidance before you start your application

We recommend that, together with your project partners, you develop your application offline by working on a Word version of the application form and subsequently copying and pasting the text into Flexi-Grant.

We suggest using **Google Chrome** as your internet browser (there may be reduced functionality with Edge and Internet Explorer in particular).

We recommend reading each page of the application form to familiarise yourself with the questions before completing your answers. Links to all application documents, including a Word template of the application form for drafting purposes, are included in the 'Summary' page of your 'Application Portal' / 'My Applications' tab, and are replicated in the 'Instructions' button at the top-right of each page of the application form. You can also print/download the entire

application form in PDF before or after completing it and you can download a blank Word template for drafting purposes from the 'Summary' page.
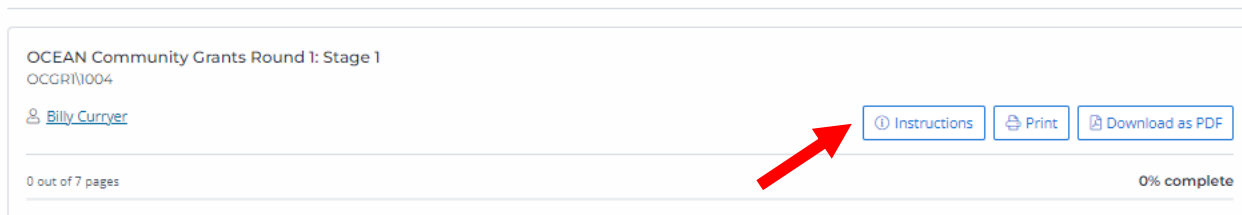
Questions marked with a red asterisk * are mandatory and must be answered. You are allowed to fill in questions in any order, but all mandatory questions must be answered to be able to submit your application.

At any stage in the application process, **you can save your work and return to it later**. You can do this by clicking the 'Save progress' button at the top or bottom of each page. Edits you have made will also be saved automatically when you leave a page by clicking either the 'Previous page', 'Return to Summary' or 'Next Page' buttons – see below.
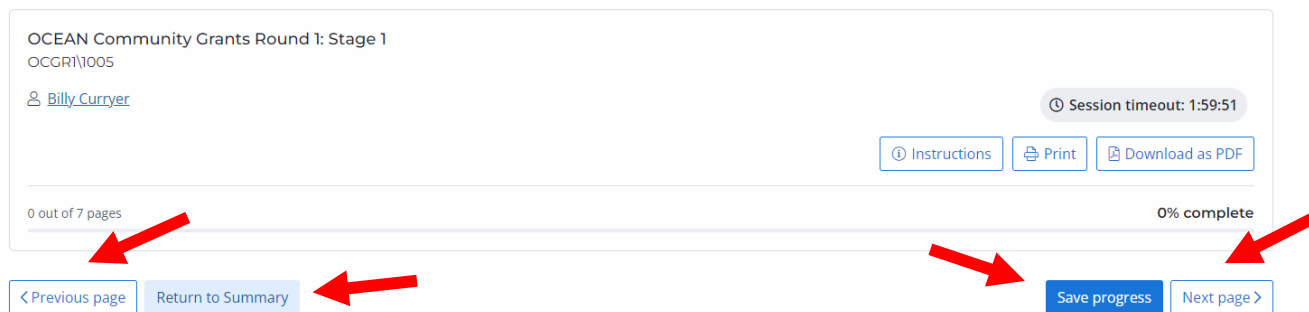
Please be aware that if you click any of the other buttons in Flexi-Grant, or the back or refresh button in your internet browser without saving, any new content and edits will not be saved.
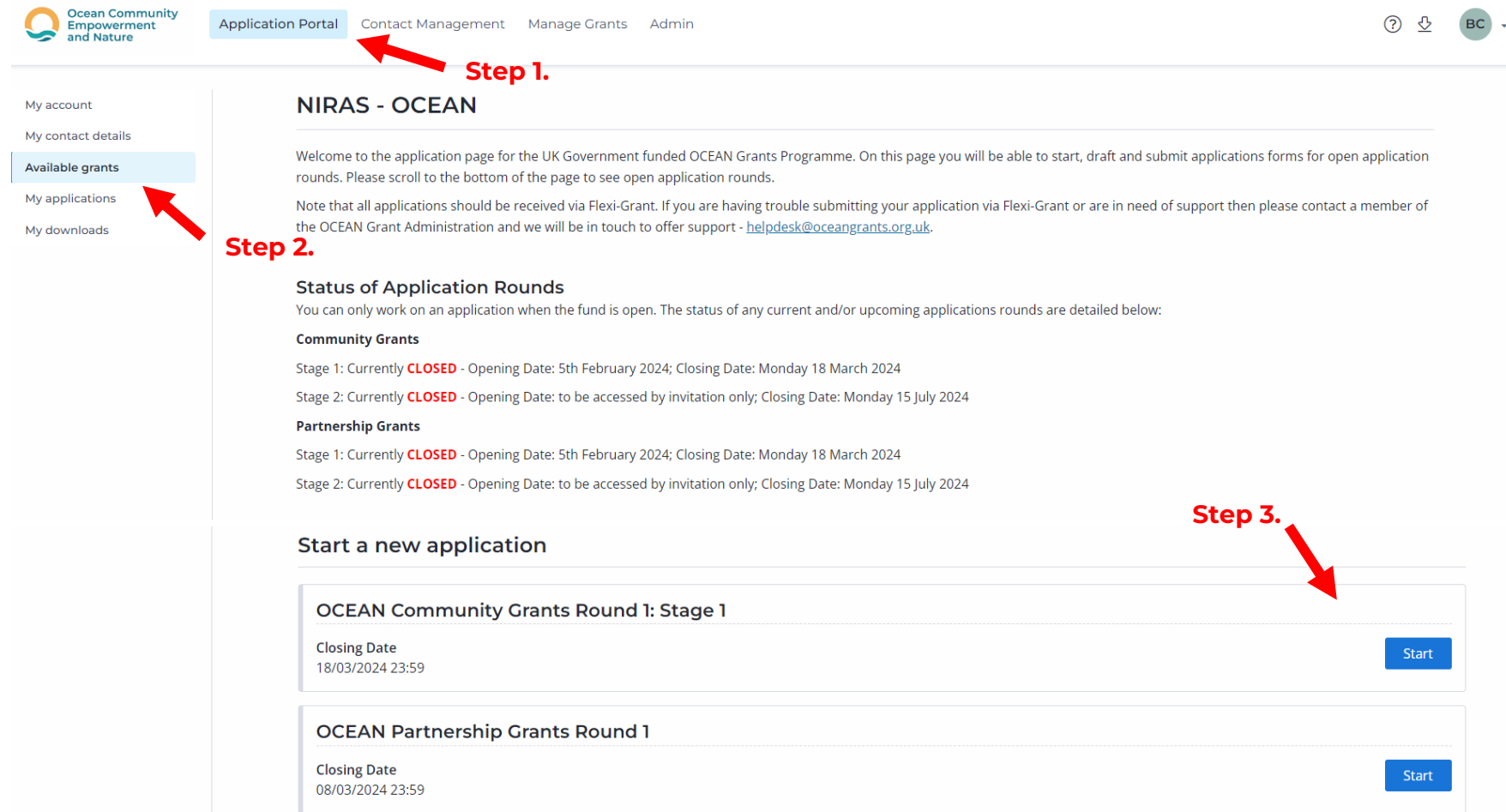
You can paste text from other sources (e.g., a Word document) into the fields on Flexi-Grant. **Check all you have copied appears as you expect**: word limits must be strictly adhered to as any words exceeding the limit will be automatically deleted.

You can **print/download the entire application form in PDF** before or after completing it, by clicking on the 'Print' / 'Download as PDF' button at the top of the 'Summary' page or at the top right of each page.
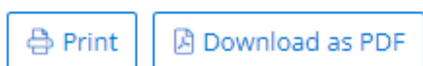
2.3. How to start a Community Grants Stage 1 Application or a Partnership Grants Single-Staged Application

To start an application form: **Step 1.** Click the 'Application Portal' button in the top-left; **Step 2**. select the tab 'Available grants' on the left; and **Step 3.** scroll down to the 'Start' button. Click this button to begin a new application (you will need to confirm you have read and understood the information above).

You will then be taken to the following page where you will be required to confirm you have understood the information and click Start to begin your application.

Applicants to a Community Grant will be able to select the language of their application between English (preferred), French, Spanish or Portuguese in the 'Available Grants' section. Applicants to a Partnership Grant will be able to select only English as the language of their application.

2.4. How to start a Community Grants Stage 2 Application

If your Stage 1. Community Grant application is successful, you will receive a unique link in your result email. **To start a Stage 2 application, you must use the link in the email and ensure you login as the original Flexi-Grant account holder**. Once you have followed this link, your Stage 1. application will be marked as complete and your Stage 2. application will appear under the 'My applications' tab with a new application reference. **Avoid clicking the email link multiple times as this will create duplicate Stage 2 applications.**

2.5. How to complete an application form

To complete a section including uploading any supporting materials, click the 'Start' button in the 'Summary' page (you can find the 'Summary' page by clicking on the 'Application Portal' button in the top-left, then selecting the tab 'My applications' on the left). **Make sure you fill in all sections of your application form and upload all required documentation.**

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After clicking start, you will be taken to the application page. Work your way through the questions. You can save progress at any time by clicking 'Save progress' and progress to the next page by clicking 'Next page' either at the top or bottom of the page.

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2.5.1. Answering Questions and Entering text

Some questions may require you to choose between multiple options. On certain questions you will be able to select multiple options, but for others you may only be able to select one answer. It will be indicated in the question whether you can choose multiple options. For example:

*Q2.3 Blue Planet Fund Outcomes

Which Blue Planet Fund outcome(s) does your project match? You can choose multiple options.

- [ ] Marine Protected Areas (MPAs) and Other Effective Conservation Measures (OECMs)
- [ ] Illegal, Unreported, and Unregulated Fishing (IUU)
- [ ] International and large-scale fisheries
- [ ] Solid waste and other forms of marine pollution
- [ ] Critical marine habitats for coastal resilience
- [ ] Small-scale fisheries management
- [ ] Aquaculture

Other questions require you to add text. Two different types of text boxes are highlighted below. Most text boxes are adjustable in size. These boxes are marked by stripes on the bottom right-hand corner. To adjust the size and shape of a box, simply click on the striped corner and drag in any direction. **Adjusting the size will not adjust any restricted word count.**

*Q2.1 - Project Title:

You have entered 0 words (10 words max)

2.5.2. Entering Currency & numbers

Certain questions will only allow you to complete the question using numbers. When answering these questions, you must only include **numbers in your answer.** Do not separate thousands using commas or add any text, and only use full stops as a decimal place. If the figure you need to input is a monetary amount, then Flexi-Grant will automatically generate the currency.

For example, the question below requests applications to enter the total funding sought across all years and by financial year (i.e., from 1 April to 31 March).

Q2.8 - Project Budget Summary

Your funding request must be in British pound sterling (GBP) and run from 1 April to 31 March. **Separate decimals with a full stop.**

OCEAN funding request	2024/25	2025/26	2026/27	2027/28	2028/29	Total request
(April - March)						£0.00

To answer one thousand GBP, you will need to enter '1000.00'; Flexi-Grant will automatically generate this into £1,000.00. If you need to indicate two hundred pounds and fifty pence GBP, enter '200.50'; Flexi-Grant will automatically generate £200.50.

2.5.3. Uploading supporting materials

Some questions will require you to upload supporting materials. For example:

The limit for any single file uploaded as supporting materials is **20MB though we encourage you to keep file sizes smaller wherever possible**. Ensure documents are **saved in PDF form where possible (apart from templates in Excel)** in order to minimise size, and are **collated as requested** e.g., all CVs in one PDF document. **The following file extensions are accepted:**

- ✅ .csv
- ✅ .doc
- ✅ .docx
- ✅ .eml
- ✅ .gif
- ✅ .jpeg
- ✅ .jpg
- ✅ .mov
- ✅ .mp3
- ✅ .msg
- ✅ .ogg
- ✅ .pdf
- ✅ .png
- ✅ .ppt
- ✅ .pptx
- ✅ .txt
- ✅ .xls
- ✅ .xlsx

2.5.4. Incomplete questions and error messages

You are allowed to progress through the application form in any order, so it is possible to leave a page incomplete. However, **you will not be able to submit an incomplete application. The 'Summary' page indicates which sections of the application form have incomplete questions or error messages.**

Number	Page	Est. time to complete	Status	Required documents	
1	Section 1 - Contact Details		In Progress		Edit
2	Section 2 - Project Information		Complete		Edit
3	Section 3 - Project Approach & Design		Not Started	0 / 4	Start

Once you have identified which section is incomplete, click the 'Start' or 'Edit' button to open the relevant section and complete any missing information.

If there is an error, a message will pop up at the top of the page and the relevant question will be marked in red. For example:

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⊙ We have identified the following issues while saving this page:

The current page has been partially saved, however these questions contain invalid values and have not been sa

* Warning - The value provided for field: Start_Date is not a valid Date / Time.

* Start date:

2.5.5. Email notifications

All emails generated by Flexi-Grant, including notification of application results, will only be sent to the account holder / Lead Applicant (see 2.1). We recommend the Flexi-Grant account holder / lead applicant has regular email access and/or shares with team members the login details. This will allow team members to fill in application questions and submit the application on behalf of the account holder / lead applicant, if necessary.

On Flexi-Grant, the account holder / lead applicant is indicated with the following black icon. See 2.6 on how to re-assign the account holder / lead applicant role, if needed.

2.6. How to collaborate on Flexi-Grant (optional)

We strongly recommend that you develop your application together with your project partners. The best way to draft an agreed answer to each application question, **is to collaborate offline by working on a Word version of the application form and then copy-paste the agreed text on Flexi-Grant**. This is available on Flexi-Grant and the OCEAN website.

However, **you can also collaborate with your project partners on Flexi-Grant**. To do so, you can send an invite to collaborate and manage invited collaborators (for example, revoking their rights to collaborate) from the **'Participants' tab on the 'Summary' page**.

Application	Participants
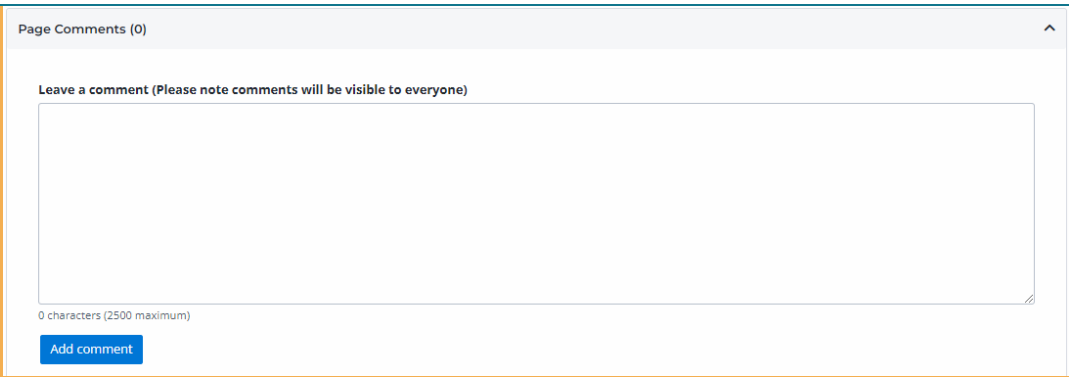
As the Lead Applicant and Flexi-Grant account holder you are able to invite partners to collaborate on this application. However, the Lead Applicant alone is responsible for submitting the final application. If you expect not to be available when submission is due, we recommend sharing login details with other members of your team who can login to submit the application on your behalf.

▾ Collaboration requests: Active, Pending or Required

Role	Assigned	Status	
❶ Co-applicant		Optional	Invite

IMPORTANT:

* All collaborators have **equal editing power**, and **changes are not marked**.

  Collaborators **can leave comments** for each other at the top of each page of the application form. To do so click on 'Page Comments' to expand the comments field, type your comment into the box and click 'Add comment'. These comments will be visible to all collaborators, reviewers and to Flexi-Grant administrators but **will not be considered during the application review process and should not be used to provide information outside of word limit**.

- All collaborators need to **mark their inputs as complete** prior to submission, otherwise the lead applicant has to revoke permission to collaborate before the application can be submitted. **This will not remove the collaborators inputs.**

- **The lead applicant must be the person who submits the final application**. If the lead applicant expects not to be available when submission is due, we recommend sharing login details with other members of the team who can login to submit the application on their behalf.

2.7. How to submit an application form (applicable to Stage 1 Community Grants, Stage 2 Community Grants, and Single-Staged Partnership Grants)

Once you have completed all sections of the application form, a **'Submit application'** button will become available at the bottom of the 'Summary' page (**note that only the lead applicant can submit the application**). This button will become available once every page of the application is marked as 'Complete'. See screenshot below.

When you click the 'Submit application' button you will be asked to confirm that you want to submit your application. **Once your application has been submitted, you will be able to view your application and its current status but you will NOT be able to modify it**.

If you find you have made a mistake and need to amend something before the deadline[1], you can contact us on applications@oceangrants.org.uk to ask for the application to be returned. If we return it, **you will need to make your edits and resubmit within the application deadline for your application to be considered**.

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[1] Refer to the Guidance for Applicants for relevant deadlines.

Summary

OCEAN Grants Programme
OCEAN Community Grants Round 1: Stage 1
OCGR1\1003

  Billy Curryer
  NIRAS

| ⓘ Instructions | 🖨 Print | 🖹 Download as PDF | **Submit application** |

7 out of 7 pages   100% complete

At any stage in the application process you can save your work and return to it at a later time. The system will automatically save your work when you change pages but we recommend that you also save your work at regular intervals to avoid loss of data. The questions and sections can be completed in any order.

We recommend reviewing each page of the application form to familiarise yourself with the questions before starting.

For all general application queries, e-mail: helpdesk@oceangrants.org.uk

Before starting your application, please ensure you have read the following:

- OCEAN Community Grants Application Manual
- Guidance for Applicants (with particular focus on the eligibility criteria)
- Terms and Conditions
- Finance Guidance
- Flexi-Grant Guidance

Documents you will need to complete alongside this application form are available below:

- Evidence of the legal status of the Lead Organisation. This could be in the form of a registration certificate or a letter of support from Host Governments/ FCDO Post.
- A copy of your Financial annual report and accounts for the past 2 years.

Questions marked with a red asterisk * are mandatory.

The closing date for all applications is **22:59 GMT (23:59 BST) Tuesday 2 April 2024**

To submit your application form:

Once you have completed all sections of the application a 'Submit application' button will become available at the top and bottom of this summary page. This button will become available once every page of the application is marked as 'Complete' - however please note that **all collaborators must have marked their inputs as complete or this button will not appear.** If they do not, the Lead Applicant will have to revoke their permission to collaborate before the application can be submitted. You may need to refresh the page after revoking permission for the 'Submit application' button to appear.

If you continue to experience issues, please email: applications@oceangrants.org.uk

When you click the 'Submit application' button you will be asked to confirm that you want to submit your application. Once your application has been submitted, you will be able to view your application and its current status but you will NOT be able to modify it. If you receive any supporting documents after the submission date, please email: applications@oceangrants.org.uk

In order to facilitate collaboration, you can also download a Word version of the application form. **Please note that applications will only be accepted via the Flexi-Grant portal. Any applications received on the Word form via email may be rejected.**

For all queries specifically related to the use of the Flexi-Grant system e-mail: applications@oceangrants.org.uk

☐ Enable form editor?

Application   Participants

Number	Page	Est. time to complete	Status	Required documents	
1	Section 1 - Contact Details		Complete		Edit
2	Section 2 - Project Information		Complete		Edit
3	Section 3 - Project Approach & Design		Complete	0 / 4	Edit
4	Section 4 - Project Partners		Complete		Edit
5	Section 5 - British Embassy or High Commission Engagement		Complete		Edit
6	Section 6 - Terms and Conditions, Mandatory Attachments		Complete	2 / 2	Edit
7	Section 7 - Declarations and Certifications		Complete	1 / 1	Edit

Submit application

3. Frequently Asked Questions

I have completed my application, but I can't see the 'submit' button.
If you are not the lead applicant, you will not be able to submit the application. Ensure the lead applicant has access near the submission deadline so that they can submit the application. If you are the lead applicant but still cannot see the submit button, ensure that any collaborators on the application have marked their inputs as complete or else you have revoked their invitation to collaborate. You should then be able to submit.

I am not the lead applicant but would like to be – how do I do this?
The person who started the application or who is currently the lead applicant needs to make you the lead applicant – only the current lead applicant and NIRAS administrators have the power to change the lead applicant. You cannot become the lead applicant if you have been invited to collaborate on the application. You must revoke your collaboration before changing to the lead applicant.

I use Flexi-Grant for other grant schemes and they require another stage of sign off – do you have this stage?
No, we have not configured an additional sign off stage for our application forms. We do ask that applicants complete *Section 14. Declarations and Certification* but we leave it up to you to manage any other necessary sign-off stages internally.

I am struggling to access the Flexi-Grant portal
If you experience any issues accessing the online portal, firstly we would suggest using Google Chrome as your browser if possible (there may be reduced functionality with Edge and Internet Explorer in particular). Otherwise contact us at helpdesk@oceangrants.org.uk and we will be in touch to offer support.

How do I sign my application?
You can upload an e-signature in *Section 14. Declarations and Certification* of your application as a .jpeg, .jpg, .png or .pdf. You may also print out the relevant page of the Word application form to sign and submit as a PDF.

How do I access the relevant guidance documents and templates?
All OCEAN guidance documents and templates are available from Flexi-Grant (https://ocean.flexigrant.com/) and from our website (https://oceangrants.org.uk/).

4. If you continue to experience issues with Flexi-Grant

If, after reading this guidance, you continue to experience issues with Flexi-Grant including but not limited to:

- You cannot access the online portal.
- You forget your login details.
- You find you have made a mistake and need to amend something before the deadline.
- You get an error message and do not understand what the error is.
- Your account holder / lead applicant changes during the review process (i.e., after you have submitted your application).

Contact us on helpdesk@oceangrants.org.uk and a member of the OCEAN Team will be in touch to offer support.