

# Flexi-Grant Guidance

Annual Application Round 2, FY 2024/25

Published in November 2024







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# 1. This document and further resources

### 1.1. Purpose of this document

This guidance note is intended for organisations interested in applying for a Community Grant or a Partnership Grant from the Ocean Community Empowerment and Nature Grants Programme (OCEAN). It provides practical information on how to use the Flexi-Grant application portal.

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

#### 1.2. Guidance notes

We strongly recommend that you read this document in its entirety before you start your application for OCEAN funding. This document is essential to learn how to use the Flexi-Grant application portal but is not exhaustive. For more detail, make sure you also read the latest versions of the following guidance notes, which will be available via the OCEAN website and Flexi-Grant ahead of each new funding round:

- Essential Information: Community Grants / Essential Information: Partnership Grants.
- Guidance Note for Applicants.
- Finance Guidance.
- Monitoring, Evaluation and Learning Guidance.
- Gender Equality, Disability, and Social Inclusion (GEDSI) Guidance.

# 1.3. OCEAN Helpdesk

If you require assistance, you can contact the OCEAN Helpdesk via <a href="helpdesk@oceangrants.org.uk">helpdesk@oceangrants.org.uk</a> in your preferred language. We will respond to your query within five working days.

**The OCEAN Helpdesk can** provide help if you cannot access Flexi-Grant, you forget your Flexi-Grant log-in details, you have made a mistake and need to amend something before the application 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). The **OCEAN Helpdesk is not able to** comment on your project ideas, pre-assess your eligibility, or confirm if your draft application and supporting documents meet requirements.

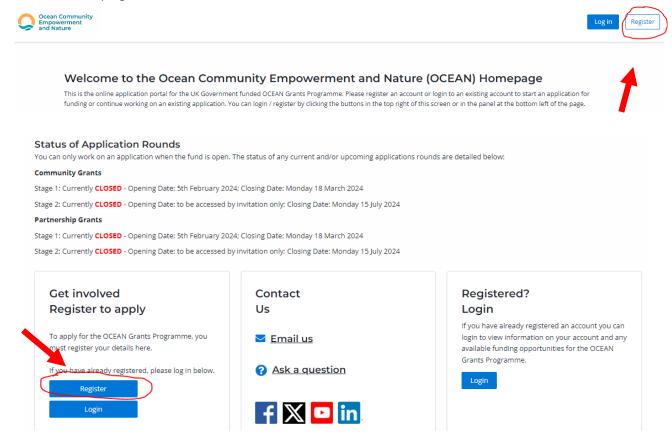


# 2. How to use Flexi-Grant

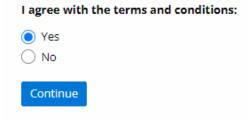
## 2.1. How to log-in and register

To submit your application, you need to log in your OCEAN Flexi-Grant account. If you already have an OCEAN Flexi-Grant account, you can use this. You do not need to create a new account for new funding rounds. If this is the first time you apply to OCEAN, you first need to register a Flexi-Grant account by following these steps.

Go to <a href="https://ocean.flexigrant.com/">https://ocean.flexigrant.com/</a> and click on the 'Register' button circled in red below. You will find one button at the top-right and one button at the bottom-left of the main page.



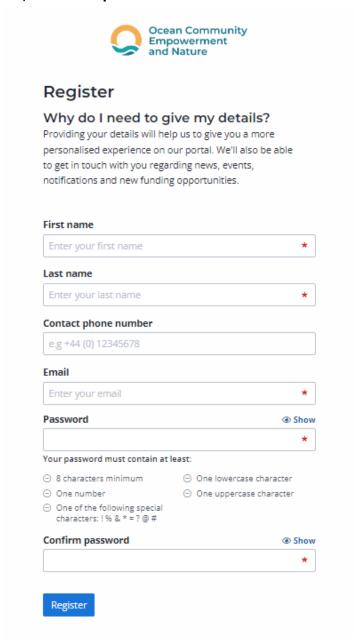
2) Read and accept the terms and conditions by clicking 'Yes' when prompted. Make sure to scroll to the bottom of each page.





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3) Input your name, email and password.

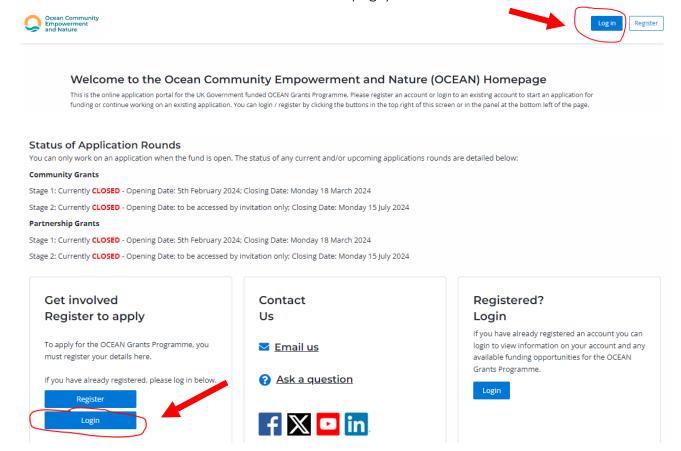


IMPORTANT: The Flexi-Grant account holder will be indicated with a black icon and be the same as the lead applicant. The Flexi-Grant account holder / lead applicant will be the only log-in that can submit your application and will be the sole point of contact for the duration of the application. We strongly recommend the Flexi-Grant account holder / lead applicant has regular email access and/or shares with team members the log-in details.

4) Open the confirmation email sent to your inbox and click on the 'Activate your Account' link. Make sure to check your junk folder if you have not received this.



5) Click on 'Log in' and enter your log-in 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 bottom-left of the main page).



# 2.2. Note before you start your application

We strongly recommend the following before you start your application using Flexi-Grant.

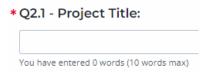
- 1) **Use Google Chrome as your internet browser**. There may be reduced functionality with Edge and Internet Explorer in particular.
- 2) Download from Flexi-Grant a Word version of the application form and develop your application offline. When ready to submit your application, you copy-paste your responses into Flexi-Grant. The Word version of the application form is available for drafting purposes only. All applications must be submitted via Flexi-Grant.
- 3) Read 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.



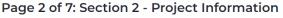
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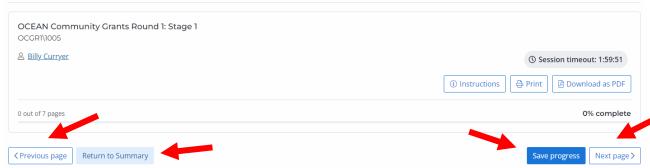
# OCEAN Community Grants Round 1: Stage 1 OCGRI\\1004 Silly Curryer Out of 7 pages O% complete

4) **Questions marked with a red asterisk \* are mandatory.** You are allowed to fill in questions in any order, but all mandatory questions must be answered to be able to submit your application.



5) You can save your work at any time 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. 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.





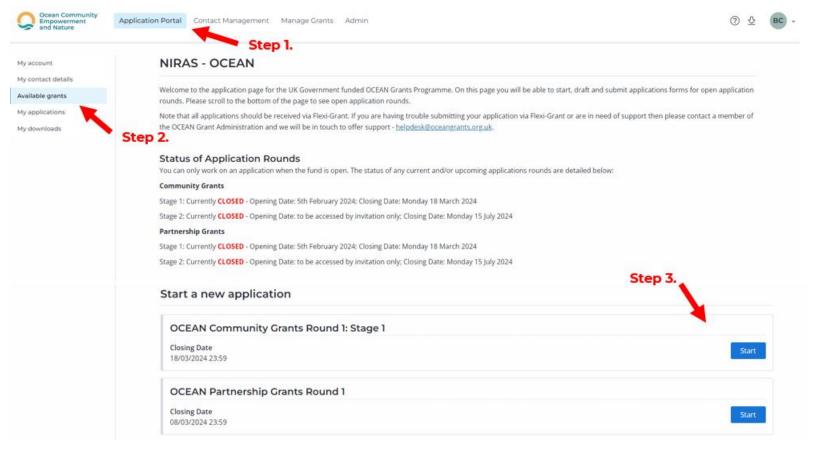
- 6) You can paste text from other sources (e.g., a Word document) into the fields on Flexi-Grant. Check all you have copied appears as you expect: word limits must be strictly adhered to as any words exceeding the limit will be automatically deleted.
- 7) You can **print/download the entire application 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.





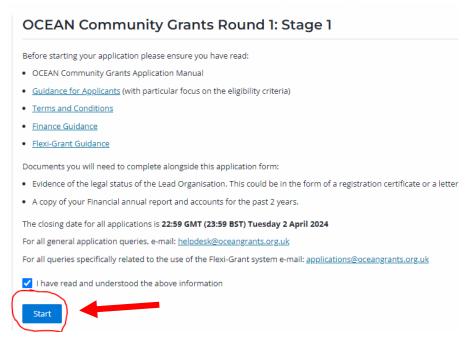
# 2.3. How to start a Community Grants Stage 1. application or a Partnership Grants Stage 1. application

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 the language of the application form (applicants to a **Community Grant** will be able to select between Bahasa Indonesia, English, French, Spanish or Portuguese, while applicants to a **Partnership Grant** will be able to select only English); 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.





**Step 4.** 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.

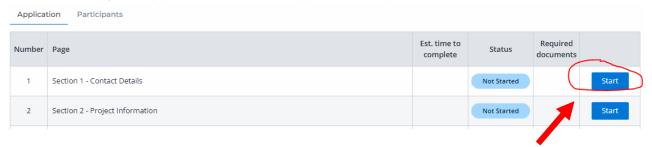


# 2.4. How to start a Community Grants Stage 2. application

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 log-in 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.

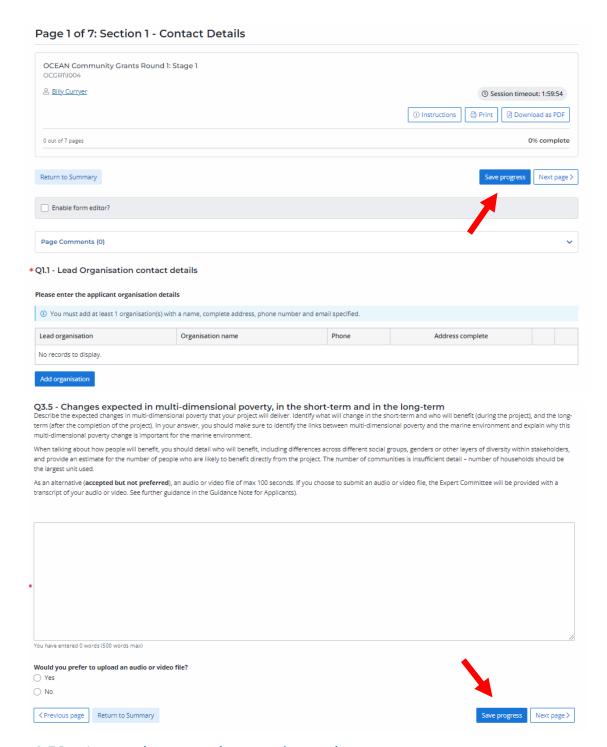
# 2.5. How to complete an application form

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.** 



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.





#### 2.5.1. Answering questions and entering text

**Some questions 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. Examples of the two different types of text boxes are shown 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.



#### 2.5.2. Entering currency & numbers

Certain questions only allow you to enter numbers. When answering these questions, 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 01 April to 31 March).



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

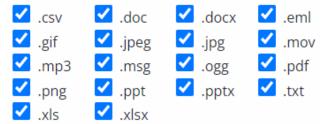
Some questions require you to upload supporting materials. For example:

\* A copy of your Financial annual report and accounts for the past 2 years.

Choose your file(s)			
<u>File name</u>			

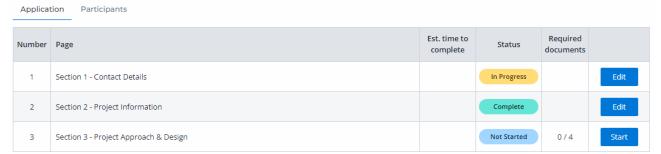


The limit for any single file uploaded as supporting materials is **20MB.** We encourage you to keep file sizes smaller wherever possible. Ensure documents are **saved in PDF form where possible** (apart from templates in Excel) to minimise size, and are **collated as requested** (e.g., all CVs in one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

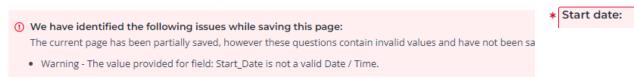


#### 2.5.4. Incomplete questions and error messages

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. 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:



#### 2.5.5. Email notifications

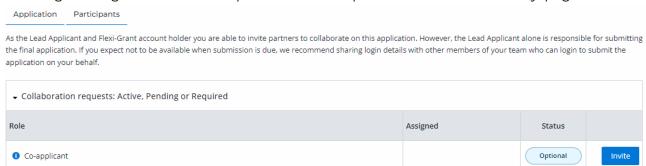
All emails generated by Flexi-Grant, including notification of application results, will only be sent to the account holder / lead applicant (see 2.1). We recommend the Flexi-Grant account holder / lead applicant has regular email access and/or shares with team members the login details. This will allow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

# 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 finalised



text on Flexi-Grant. 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.



#### **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 must 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 log-in 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 Stage 1. Partnership Grants)



Only once every page of the application is marked as 'Complete', a **'Submit application'** button will become available at the bottom of the 'Summary' page. **Note that only the lead applicant can submit the application**.

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 application deadline, contact <a href="mailto:applications@oceangrants.org.uk">applications@oceangrants.org.uk</a> to ask for the application to be returned. When an application is returned, you can make your edits but will need to resubmit within the application deadline for your application to be considered. Make sure you always quote your application reference number when contacting <a href="mailto:applications@oceangrants.org.uk">applications@oceangrants.org.uk</a>.

#### Summary



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: <u>helpdesk@oceangrants.org.uk</u>

#### 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

#### $\label{lem:complete} \textbf{Documents you will need to complete alongside this application form are available below:}$

- 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:  $\underline{applications@oceangrants.org.uk}$ 

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: <a href="mailto:applications@oceangrants.org.uk">applications@oceangrants.org.uk</a>

In order to facilitate collaboration, you can also download a <u>Word version</u> 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:  $\underline{applications@oceangrants.org.uk}$ 

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



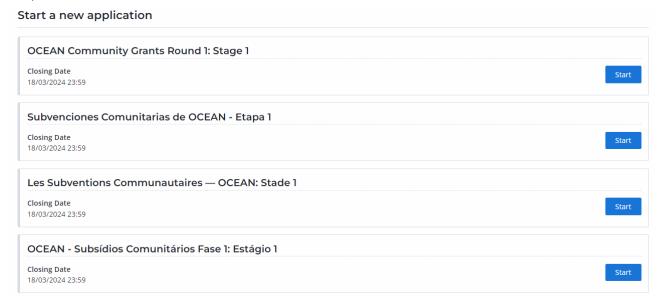


# 3. Common application mistakes

Below the most common application mistakes to help you submit a correct application form.

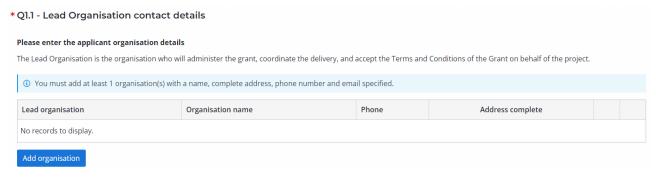
# 3.1. Using the correct application form

Make sure you are using the correct application form for the grant you are applying to. Applicants to a **Community Grant** will be able to **select the language** of their application between English (preferred), Bahasa Indonesia, 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. For example: if you are going to complete your Community Grant Stage 1. application form in the Spanish language, make sure you select 'Subvenciones Comunitarias de OCEAN – Etapa 1'.



# 3.2. Add contact details for only one lead organisation

Each application can have only one lead organisation and must provide their contact details in the application. The lead organisation is the organisation who will administer the grant, coordinate the delivery, and accept the terms and conditions of the grant on behalf of the project.





# 3.3. Make sure your project dates and budget summary align

In the budget summary, you need to indicate the amount requested for each financial year (i.e., from 01 April to 31 March). Make sure you only request funds for financial years within your project duration. As an example, see below where funds have been mistakenly requested for the financial years 2027/8 and 2028/9, but the value here should be zero since the project is scheduled to end in October 2026 (FY 2026/2027). Remember that the annual value you are requesting for any given financial year must not exceed 50% of your lead organisation's annual income if you are applying for a Community Grant, and 25% if you are applying for a Partnership Grant.

#### Q2.7 - Project Dates

Write dates as day/month/year.



#### Q2.8 - Project Budget Summary

Your funding request must be in British pound sterling (GBP) and run across each Financial Year (FY) from 1 April to 31 March. In the table below, tell us how much funding you are requesting for each financial year.

**Input only figures**. Flexi-Grant will automatically generate the currency. Do not separate thousands using commas or add any text, and only use full stops as a decimal place. 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. Enter '0' if you are not seeking funding for any financial year. Flexi-Grant will automatically calculate the total funding request.



# 3.4. Submit your completed application

Once you have filled in all sections of your application, do not forget to click the 'Submit application' button. You will receive an automatic email confirming your application has been received. If you do not receive this, please contact <a href="mailto:helpdesk@oceangrants.org.uk">helpdesk@oceangrants.org.uk</a>.

