Application Stages Guidance

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About this guidance

There are four types of application/ enquiry that can be submitted to Access.

The application types are:

- Enquiry
- Stage 1 application
- Stage 2 application
- Top-up application

You can read more about each of these stages below.

Applicants **do not need to move through all four stages linearly** – the right starting point for you will depend on your plans and your preference. This guidance outlines each of the stages to help inform your decision. Your Access Relationship Manager will also be happy to help guide you on this. If you do not yet have a Relationship Manager, please email us and we will be in touch.

If you are considering submitting any stage of application, please read our Investment Policy carefully first.

Enquiry

The Enquiry stage is optional, but we encourage its use by applicants for whom one or more of the following applies:

- Those who have not worked with Access before and would like to confirm their eligibility to apply for funding.
- Those who would like an early steer from the Investment Committee on their idea, or on specific elements of their idea, before they complete a Stage 1 or Stage 2 application.

- Those who would like an early steer from the Investment Committee about whether the size of application that they intend to submit feels realistic.
- Those who already know that they want to apply but who do not intend to do so for several months or years (we will be committing this funding over a four-year period from 2025, but we expect there to be a degree of front-loading – please see section 6.2 of our Investment Policy for details). This is so that we can make the Investment Committee aware of your interest by including you in our Pipeline. Being aware of the overall scale of demand, and of what applications are expected in the future, will help to inform our IC's early decision making. Alternatively, if you want to be added to our Pipeline but feel that your ideas are too early stage to submit an Enquiry yet, you can let us know by reaching out to your Relationship Manager.

If you would like to submit an enquiry, please see the Enquiry form and Enquiry form guidance which can be downloaded here.

Stage 1 application

The application form for Stage 1 and Stage 2 is the same. The difference is the level of progress and detail required when answering the questions. For Stage 1, the level of information required will be more than at the Enquiry Stage, but less than at Stage 2.

A Stage 1 application will enable you to receive feedback from our Committee. It will not enable you to receive an offer of funding – for that a Stage 2 application will be required.

Applicants are not required to submit a Stage 1 application – you may proceed straight to Stage 2 if you wish to do so. However, in most cases we would recommend taking advantage of the opportunity to receive feedback and steer from our Investment Committee at Stage 1, before you complete a more detailed Stage 2 proposal. This is because we recognise that Stage 2 proposals involve a lot of work by applicants, and we are mindful that our funding is in very high demand, so we will not be able to support everything. If you submit a Stage 1 application which is not endorsed by our Investment Committee, this does not prevent you from still submitting a Stage 2 application later if you wish to do so, but the Investment Committee's steer will be intended to guide you on the likely chance of success if you do decide to proceed. If you do intend to skip Stage 1, we strongly advise you to speak to your Access Relationship Manager before embarking on a Stage 2 application.

The Stage 1 and Stage 2 application guidance outlines what level of information is required from applicants at each of those two stages respectively. There is some degree of flexibility over how detailed a Stage 1 application can be. Some applicants may prefer to provide the minimum level of information required at Stage 1, in order to receive an early steer from the IC before deciding whether to work up a detailed application. Other applicants may prefer to provide quite detailed information at Stage 1 – producing almost (but not quite) a Stage 2 application – in order to receive the most effective feedback/ steer from the Investment Committee to aid the completion of a Stage 2 application. The approach that you choose to take here is entirely up to you.

Stage 2 application

A Stage 2 application is a full application. Whilst the previous application stages are optional, all applicants will need to submit a Stage 2 application (or a Top-up application) when they are ready to do so, in order to apply for funding.

If you do intend to skip Stage 1 and start at Stage 2, we strongly advise you to speak to your Access Relationship Manager first.

The Stage 1 and Stage 2 application guidance (available here) outlines what level of information is required from applicants at each of those two stages respectively. At Stage 2, all of the applicable questions will need to be answered fully.

As outlined in Section 5.4 of our Investment Policy, we are open to providing contributions to the costs of putting a Stage 2 proposal together in some cases. If you do want to apply for a small Development Grant of this nature, you will need to submit a Stage 1 application first and then be invited by the Investment Committee to progress to Stage 2. (You can apply for your Stage 2 Development Grant as part of your Stage 1 application.)

Top-up application

The Top-up application form is a separate application form with its own application guidance. Both are available to download here.

The Top-up application stage is only open to organisations who have received Dormant Assets funding from Access previously and who are applying for money to 'top-up' their existing (Access-funded) fund – one which is either currently open or has recently closed. Therefore, we envisage that this application stage could be used by:

- Partners who have run a fund* under our Flexible Finance programme, Energy Efficiency Social Investment Programme (EESIP) or Enterprise Growth for

Communities (EGC) programme** who wish to extend their fund as a stand-alone proposal***. Or;
- Partners who initially receive funding through this 2025 Dormant Assets release and then wish to later apply for further funding to extend their fund, programme or project (e.g. in 2026/27 or later)****.

This application stage is slightly lighter touch than a Stage 2 application, recognising that partners will have completed a full Stage 2 application previously (albeit possibly a slightly different version under a previous programme). However, the bar for success is just as high as with Stage 2 applications – existing partners applying for top-ups will not be prioritised over other applicants.

*The bar for top-ups, as with all funding applications, will be high. Due to our limited pot of funding, we do not expect to be able to approve every top-up application that we receive, even for funds that have been successfully deployed. As part of the top-up application we will ask you to reflect on the performance of your fund to date, which will form part of the assessment criteria. However, partners should also be aware that we are assessing top-up requests against our new Investment Policy (for the £87.5m 2025 Dormant Assets release, where the funding would come from if your application is successful), not the Investment Policy for the programme that you originally applied under. Therefore, you will need to be able to demonstrate a strategic fit with our current strategy/ Investment Policy and not simply demonstrate that you delivered on your original mandate.

**If you have previously partnered with Access on a programme that is not mentioned here and you would like to apply for a top-up, please speak to us first to check eligibility. Please note that the Top-up application form cannot be used to apply for a top-up for a Growth Fund fund.

*** A Top-up application form may only be used to apply for a stand-alone top-up to an existing fund. Partners wishing to apply for both a top-up of an existing fund and for other funding for new/ different activity are welcome – and encouraged – to combine those asks into a single Stage 2 application instead, if timelines allow. We recognise, however, that some partners may wish to apply for a top-up immediately and then submit a broader application at a later date, which is why we are making this Top-up application stage available for stand-alone applications if you wish.

****Due to the significant level of demand that we expect to receive for our current funding, it is possible that some successful Stage 2 applicants will be offered less money that they had requested. In such cases, applicants can bear this Top-up route in mind for a year or two down the line, if their fund gets off to a good start.