Enquiry form guidance

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About this guidance

There are four types of application that you can submit to Access, depending on what stage you are at. 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. Please read our brief Application Stages Guidance document first, to determine which stage could be right for you. Your Access Relationship Manager will also be happy to help guide you on this. If you do not yet have a Relationship Manager (RM), please email us and we will be in touch.

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.

How to complete the Enquiry form

This section offers some guidance on how to complete each question in the Enquiry form (which can be downloaded here).

Please start by completing the table in the Enquiry form with your organisation's name, the name of the person that we should contact about your application, and the date that you are submitting your Enquiry form.

Question 1: Please indicate which area(s) you intend to apply for money for, by adding either 'N/A' or an indication of the approximate amount of money to each row of the table below.

We understand that you might be at a very early stage in your planning. That is absolutely fine. We will not hold you to any figures that you indicate here – we understand that your plans may change between Enquiry Stage and Stage 1 application.

It would nevertheless be helpful if you could indicate approximate figures in the table. This will help us to obtain a more effective steer for you from our Investment Committee. It will also help us to gauge the overall level of demand for our funding so that we can guide and support you and other applicants most effectively.

In our Investment Policy, Section 2 covers blended finance and enterprise grants, Section 3 covers pre and post investment support and Section 4 covers social investment infrastructure and ecosystem development.

Question 2: Please tell us a bit about your plans.

This could include, where relevant/ if known at this stage:

- **Your target market and any specific (thematic/ geographic/ other) focus areas**
- **The type of product(s) that you intend to deliver, if applicable**
- **A brief outline of the social investment infrastructure/ ecosystem development project that you intend to propose, if applicable**

The more information you are able to provide at this stage, the more effective steer we can give you.

The amount of detail that you include here will depend on how defined your ideas are at this stage, as well as the main purpose for which you are submitting an enquiry. If you are submitting an enquiry just to inform us of your intention to apply in a year or two's time, you can be as detailed or as brief as you like. If you are submitting an enquiry in order to ask for a steer from our Investment Committee on the eligibility or suitability of your ideas, then the more information you provide the more effectively we will be able to support you.

The bullet points in the question indicate some information that might be helpful to include, but you are welcome to provide additional information too. Your Access Relationship Manager can guide you on anything additional that might be helpful to include in your case.

Question 3: Please tell us a bit about:

- **Your organisation's experience and track record in the area(s) that you intend to apply for money for**
- **Whether you expect to partner with any co-funders or delivery partners and, if yes, whether you have identified those partners/ potential partners yet**

On bullet point one, you do not need to have partnered with Access before in order to demonstrate a track-record. We are interested in understanding what sort of experience you have in the area(s) in which you want to apply for funding (e.g. blended finance or enterprise grants etc).

However, if you have partnered with Access before, there's no need to include details that we will already hold. If we already know you well, you are welcome to leave this question blank. However if you are proposing to deliver something different to what we have funded you to do in the past (e.g. if we have partnered with you on blended finance in the past but you now want to deliver enterprise grants) then please tell us about your relevant experience in that new area.

On bullet point 2, if you plan to work with any partners such as co-funders, delivery partners or other types of partners, please let us know here. If you already know who those partners might be, please tell us. If you intend to seek partners but have not done so yet, please tell us that too.

All blended finance applicants will be expected to source co-funding (although you do not need to have done so yet). It is not required for enterprise grant applicants to source their own co-funding, although you are of course welcome to do so.

We usually define 'delivery partners' as any organisations who will have a formal role in the delivery of your fund, programme or project– often via a contractual relationship with you. Delivery partners might include organisations helping to: market the fund/ programme, build pipeline, extend reach, support applicants, provide follow-on support to investees/ grantees, provide back-office support, deliver a project, etc. Applicants are not required to work with delivery partners – we are happy to receive singular or collaborative/ partnership proposals.

Question 4: Please tell us:

- **Is there any specific guidance or steer that you would like from the Investment Committee on your Enquiry?**
- **Is there any specific guidance or support that you would like from the Access team to help you progress towards a Stage 1 or Stage 2 application?**

In this question we would like to know how we – the Access team and our Investment Committee – can best support you at this stage. We would be happy to discuss this with you too if helpful.

Question 5: Approximately when do you hope to be ready to progress to a Stage 1 or Stage 2 proposal?

As the application form notes, this is just to provide us with an indication at this stage and we will not hold you to this.

If you do not have a timeline in mind at this stage, that is fine.

If you are keen to progress quickly, or if you have a specific timeframe in mind, please let us know. We can guide you on what may or may not be feasible, and work with you to plan a potential timeline. We are happy to have those conversations with you before or after you submit your Enquiry form.

Question 6: Is there anything else that you would like to tell us?

This question is optional. If the answer is no, feel free to leave it blank. We are also happy to chat to you if there is anything further that you would like to tell us or if you have any questions at this stage.