



Garfield Weston
FOUNDATION



Guide to Applying Online



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FOUNDATION

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Grant recipient
National Theatre



Introduction

This guide is to help charities submit their funding application online and to assist our grant holders to submit their end of grant report to the Foundation.

Applying online for funding

Applying online is easy and all you need is an email address to set up an account. Online applications may be edited, saved and returned to at any time until you are ready to submit and you are able to upload and attach the necessary documents to your application.

Should your application be successful, you can see when your monitoring or end of grant reports are due and submit them from your account. The majority of applications we receive are made online. You can print your application before submitting it and, on submission, you will receive an email acknowledging receipt. The email will include a copy of your completed application and we suggest you save this for your records.



To submit your application, please follow the steps below:

- 1 Before making a grant application, check if your organisation is eligible to apply - [click here](#) to take our Eligibility Quiz.
- 2 Read our application guidelines thoroughly.
- 3 Access our online application section. If you do not already have an online account with the Foundation, then see the following pages for instructions on how to create an account. Once this has been created, you will receive a welcome email, confirming your account details and providing your personalised link. We suggest that you retain a copy of this email for your records.

Once logged in, confirm that your organisation is eligible to apply by filling in the questionnaire when prompted.

[Click here](#) to apply online.

- 4 **Complete your application**
Please ensure you provide all the information we need, as detailed in the application guidelines. You can save your application and return to it simply by clicking Save & Finish Later. You will receive an email confirming that your application has been saved, with a tracking number and a copy of the application for your records.

To return to your application, follow the personalised link provided in your welcome email. Otherwise, [click here](#) to log back in to your account.

5 Submitting your application

Once you have completed your application, please click **Review & Submit**. You must include ALL necessary documents when you submit your online application. All documents must be in Word, Excel, pdf or image format. We cannot accept documents in other formats and the total size of documents should not exceed 25Mb. You will receive an email to acknowledge receipt of your application.

All of the information you provide will be held on our database. This information will only be used for the administration of applications and grants or for producing statistics and information about successful applicants. Remember to keep a copy of the completed application and accompanying documents for your own records.

To see your submitted application, click the Show dropdown box and choose **Submitted Applications**.



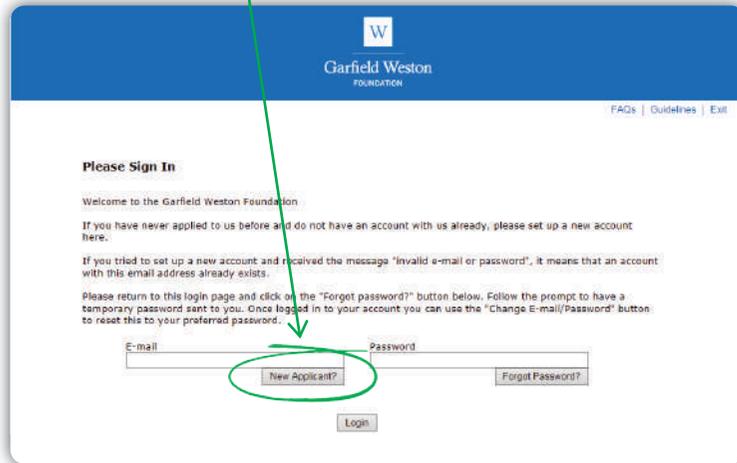


How to create an account

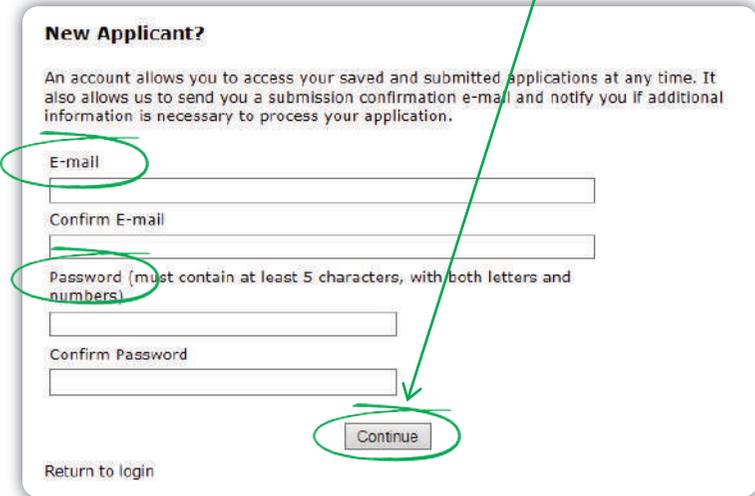
All you need is an email address to create an account and you will be able to save and come back to your application at any time. Once you have created an account, you will be able to view your online application history. If you are a current grant holder, you will also be able to see when your end of year grant report is due and submit it online.

To create an account for the first time, please follow the steps below:

- 1 [Click here](#) to set up an account
- 2 Click on **New Applicant?** button



- 3 In New Applicant screen, enter your email address and create a password, then click on the **Continue** button at the bottom of the page.



You will then receive a welcome email confirming your account details.

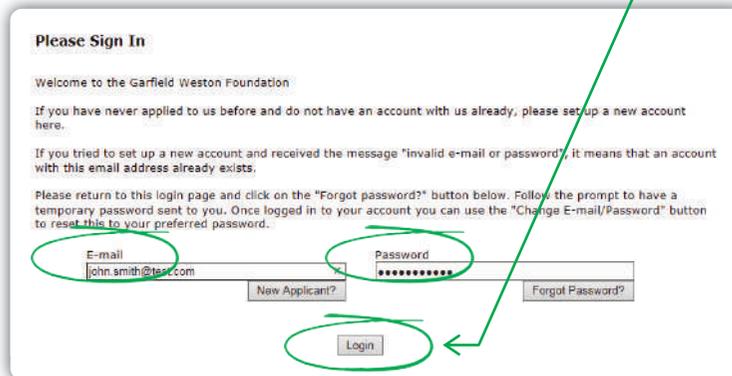




How to log in to your account

To log in to your account, follow the steps below:

- 1 [Click here](#) to log in to your account
- 2 Enter your email and password, and then click **Login**



Responding to requests for additional information

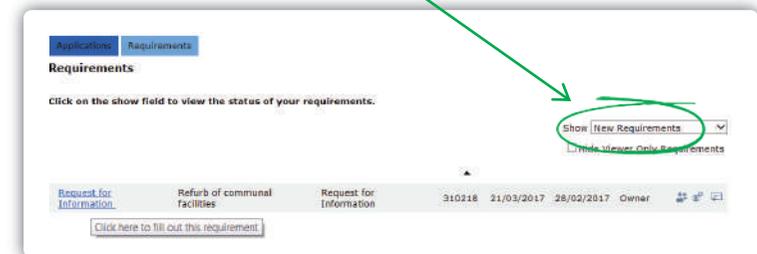
We appreciate the amount of time and work that goes into creating a good application and sometimes some information can be left out. Within our online application system, there is a feature called 'Requirements'. Occasionally we use this to request additional information from our applicants. If you applied online, we will send an email to the address associated with your online account, outlining what we need (e.g. fundraising plan) and a link to where you need to upload this information to. This must be included in a single Word, Excel or PDF document and not exceed 25MB.

Should you receive a request to provide us additional information, then please follow the steps below:

- 1 [Click here](#) to log in to your account
- 2 Within the home screen, click on the **Requirements** tab



If viewing the requirement for the first time, the page will default to show all **New Requirements**





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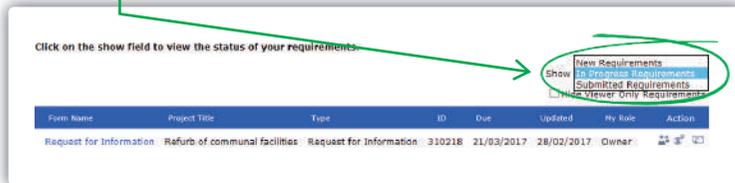
Reporting: submitting your monitoring or end of grant reports

Pledges: submitting your release form

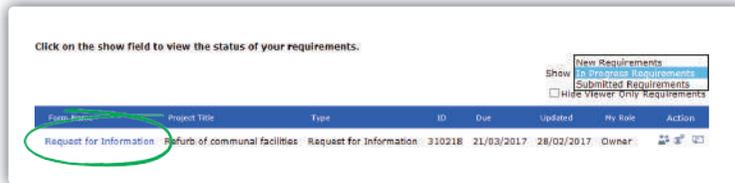
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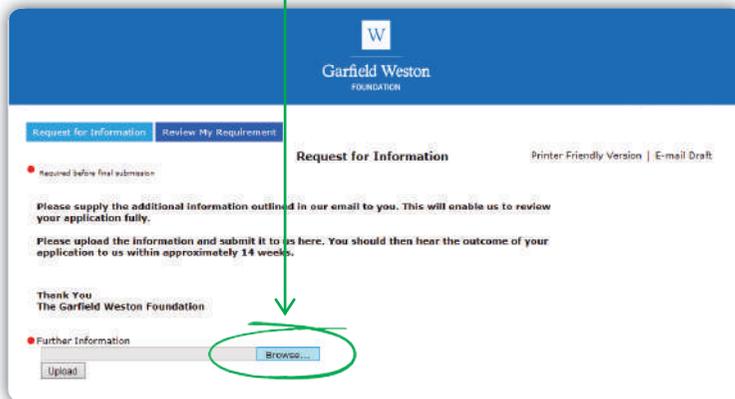
If you don't have the information ready to upload when viewing the requirement for the first time, you may need to change the dropdown view to show requirements **In Progress** when you are ready to submit your information.



3 Click on the request to upload your document (any missing information must be included in one document).



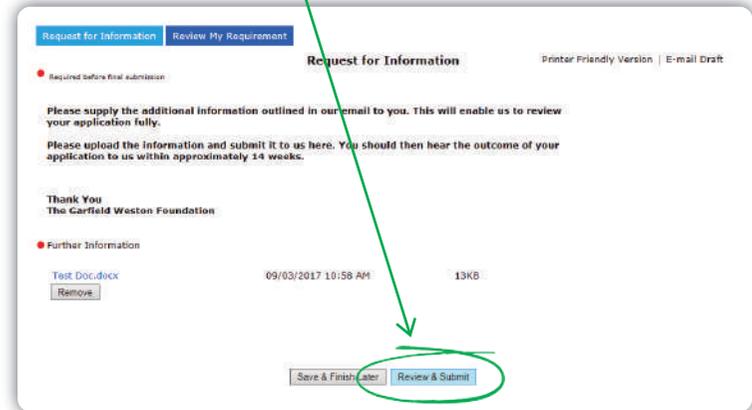
4 Click **Browse** and locate the file. Select the document and click **Open**. The file location path will then appear in the field next to the **Browse** button.



Then click **Upload**

Please make sure to **ONLY** upload the information requested. There is no need to resubmit your whole application.

5 Then press **Review & Submit**, followed by **Submit**.



You will then receive an email confirming your submission. Once we have received this information, we will be able to process your application. We aim to make a decision within four months.





Reporting: submitting your progress or end of grant reports

If you have been awarded a grant, you will receive our Grant Terms & Conditions which state that we will require an end of grant report and also progress reports if you receive a multi-year grant. Please refer to garfieldweston.org/grant-holders/ to see what we look for in these reports. If you applied to the Foundation online and are ready to submit your report to us, then log in to your online account and follow the same steps as for a request for further information but choose the 'reporting requirements' option.

Pledges: submitting your release form

In some instances the Foundation may offer a grant to be paid when specific conditions have been met (for example when your organisation has raised a certain level of funds). You will receive a Pledge Letter which will outline what the conditions are and a Pledge Release Form. When you believe the conditions have been met, fill in the release form. We will also require a copy of your organisation's latest bank statement (i.e. issued within the last three months). The bank statement should clearly show the account name, sort code and account number. If you applied online, please upload the Pledge Release Form and bank statement via your online account from our website. For instructions, please go to page 5 and follow the same steps as for a request for information.

FAQs

Below are some of the frequently asked questions that we are asked. If you can't find the answer to your question, then please email us at admin@garfieldweston.org.

Am I able to log in to my account using my smartphone or tablet?

Yes you can, however please note that we do not have an app for this and so functionality may be limited on your device.

I want to access my online account but have forgotten/lost my password

This is quick and easy to resolve. Go to the 'Apply Here' page and select the 'Forgot Password?' link. You will be asked to enter the email address associated with your account – you will receive an email with instructions on how to reset your password.

The system is not accepting my details when trying to create a new account

This usually happens when an account already exists for your email address. Please click on 'Forgot Password?' to reset your password.

I was working on an application last year, where has it gone?

Usually applications expire if not activated/worked on within a four month time frame. However, sometimes this period is shortened due to maintenance updates or changes to application forms.

Why isn't the application form showing the right details?

Try clearing the cache and cookies of your browser. Try following the instructions at:

www.wikihow.com/Clear-Your-Browser's-Cache or
www.aboutcookies.org/how-to-delete-cookies/





At what stage should I add attachments?

At the end of the online application process, on the last page of the application form, you will be asked to attach the following:

- a covering letter on headed paper signed by a senior member of your organisation
- your funding proposal – include ALL the information about your organisation, your work, budget and fundraising strategy
- your latest audited accounts or annual return as submitted to the Charity Commission if you are an exempt charity
- church applicants will also be asked to upload a picture of the front of the church building

Please note that you can only upload these and no additional documents. If you have appendices, these either need to be added to the end of your funding proposal or, alternatively, we suggest that you send your application to us by post along with the two page application form.

Why does it say our files are not being accepted?

There are three likely reasons why the system is not accepting an attachment;

- the file is too large (needs to be smaller than 25MB)
- it's an unrecognised file type (you can only upload files with the following file extension: pdf, doc, docx, xls, xlsx and image files e.g. jpg)
- the file is corrupted or is password protected. Please make sure that all passwords are removed before submitting documents

Help and Support

If you have any questions or need help with applying online, please give us a call on **020 7399 6565** or email us at admin@garfieldweston.org





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