



Grants Portal Handbook

Church of England

V1.0 Published: May 2026



For Grantees



Grants Portal Handbook

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Grants Portal Handbook

Preface

Welcome to the Grants Portal Handbook! This guide provides instructions for using the system to see new funding available from grant teams within the National Church Institutions (NCIS) and how to apply for new funding, and how to manage your grants through their lifecycle.



To complement this Handbook, you can access a series of short recordings that demonstrate the main tasks you may need to do in the Grants Portal...please look for links to these recording throughout the Handbook.

Introduction to the Grants Portal

Grants play a vital role in supporting the mission and ministry of the Church of England. The Grants Portal is a modern, Church-wide platform that brings all grant information and activity into one place, making it easier to manage and track your grants.

The Grants Portal is an online system for managing grant applications and awarded grants across the NCIs. It provides grantee organisations with a single, reliable source of information, including applications, payments, monitoring reports and grant change requests. By moving to a consistent, online way of working, it reduces reliance on spreadsheets and email, improves visibility of your grant information and helps streamline processes.

The Grants Portal is accessed via a web browser using Single Sign On, so no separate password is required. Registered users will receive their login details by email along with details for setting up two-factor authentication, which is used to ensure data is secure and protected from cyber criminals.

IMPORTANT: once you have access, please do not change the email address on your contact details in the Grants Portal. If you need to change your email address, please email the Helpdesk at GrantPortalSupport@churchofengland.org.

This handbook will guide you through how to use the Grants Portal and where to find further support, helping you manage your grants with confidence.

Overview of the Grantee lifecycle on the Grants Portal

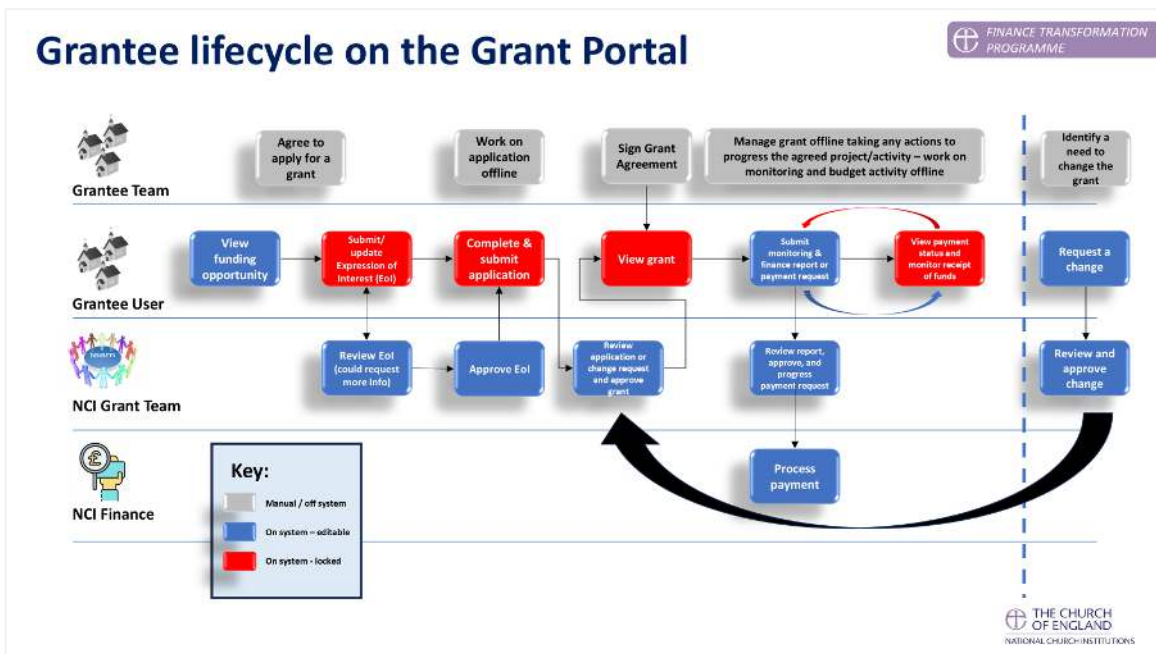
The Grants Portal manages the lifecycle of each grant, from application to closure, as follows:

- **View all open Funding Opportunities:** You will be able to see details for each Grant Stream that has a Funding Round accepting new applications

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- **Express interest in a Funding Opportunity:** You can complete a simple form to express interest in applying for a grant from a specific Funding Round before completing a full application. (This depends on the type of Funding Round, only some require an Expression of Interest before completing a full Application)
- **Apply for a grant:** Once your organisation has agreed to apply for funding, you can complete an online application, including your grant budget
- **View grant award:** Once the application has been approved and a Grant Agreement has been signed, you can view your grant in the system, including a payment schedule and monitoring reports to complete during the life of the grant
- **Manage grant:** You can request payments and see when a payment has been approved, complete monitoring reports, and request changes to your grant



Whilst there will still be some work completed offline, the Grants Portal will record key actions and approvals, notifying grantees as progress is made on applications and grants.

What can I do / what information can I see in the Grants Portal?

To access the Grants Portal, you will need to be setup as a User for your organisation. See [How to request access/remove access to the Grants Portal](#). There are different levels of access to control what you can see and do in the system:

1. **Grantee - Single Grant:** an individual who is identified as the owner of a grant record who is responsible for managing their own grant(s) for their organisation. They can only see their own application and grant records. This is the default access provided to Grant Owners

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2. **Grantee - All Grants:** an individual who is authorised to see and update all applications and grant records for their organisation. They can see all applications and grants records for their organisation, *although only the grant owner can submit payment requests and monitoring reports*
3. **View Only - All Grants:** an individual who is authorised to see all applications and grant details for their organisation, and run reports, although they cannot update data

IMPORTANT: Grantees with the '**All Grants**' or '**View Only**' access will be able to see **all** documents uploaded onto the Grants Portal for their Organisation. The NCI Grant Teams will be able to see **ALL** documents for **ALL** Organisations. Great care **MUST** be taken to avoid uploading personal data that is subject to data privacy legislation.

What's the issue?

- **Any unredacted personal data in files** uploaded onto the Grants Portal to provide evidence for payments, such as NI Numbers, addresses in payslips, **exposes risk of people seeing personal data beyond what they need to see**

What's the risk?

- Best practice for data governance is that people should not see personal data beyond the requirements of their role
- Data breaches of this kind could be investigated by the Information Commissioners Office (ICO); **finer can be millions of pounds**

What do you need to do?

- Only **upload files with non-personal data** or where **personal data has been redacted**
- If you need to send personal data to the NCI Grant Team, contact them to discuss the most appropriate way to send this information

Options for redacting documents

1. If your document is editable (Microsoft Word, Excel etc)...

- Delete any personal data, or insert a shape and put a black box over any data
- Save the document as a PDF

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2. If you are scanning a physical document...

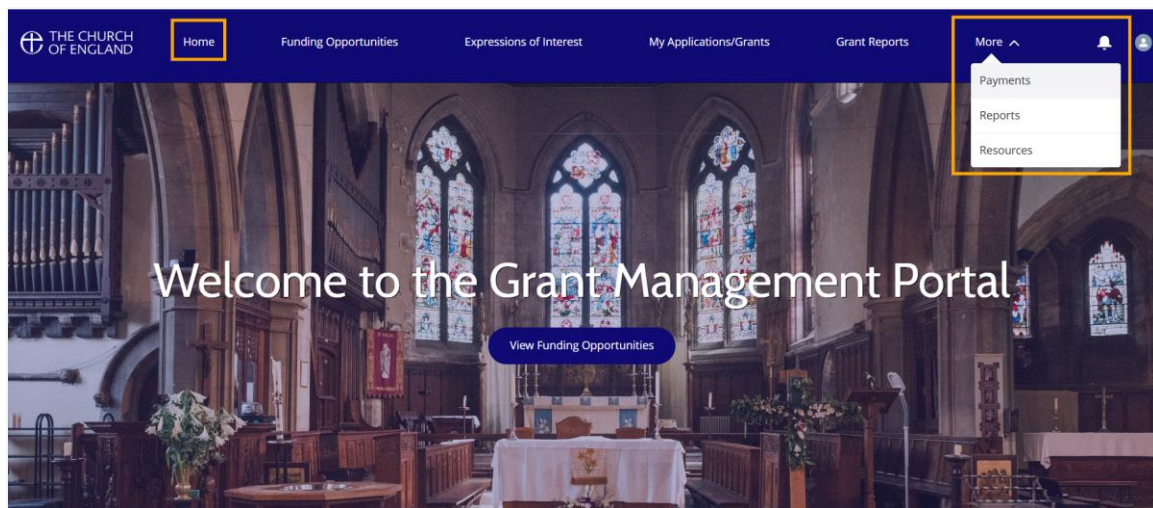
- Put a piece of paper or a Post-It note over any personal data before scanning

3. If your document is a PDF...

- Use the redact option if you have PDF editing software, such as Adobe Acrobat Pro
- If you don't have editing software, open the PDF in a Microsoft Edge browser, use the draw function with a thick black pen and use the print button to 'Print to PDF' to save a file that cannot be un-redacted
- **Please note:** if you 'Print to PDF' in another browser, your redacted PDF can be edited and the redaction removed

Navigating the Grants Portal

When you first log into the Grants Portal, you will land on the **Home** page with a navigation menu at the top of the screen. Depending on the size of your screen, some options may appear under the **More** button, which can be viewed by clicking on the drop-down arrow.



- **Funding Opportunities:** this will show you all open Funding Rounds from NCI Grant Teams that are accepting new applications for grant funding
- **Expressions of Interest:** if you have expressed interest in a Funding Round, your form will be recorded here, along with the response from the NCI Grant Manager
- **My Applications/Grants:** in this tab, you will see all applications and grants that you are authorised to see, along with the status of applications as they are reviewed and approved
- **Grant Reports:** in this tab, you will see all Monitoring Reports for active grants you are authorised to view, what you will need to complete, when the report is due and whether the Monitoring Report is linked to a payment. As Monitoring Reports are submitted by

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the Grant Owner and reviewed by the NCI Grant Manager, you will see when they have been accepted and approved, and whether more information is required

- **Payments:** in this tab, you will see all Payments for active grants you are authorised to view, what payments are scheduled, what has been requested, what has been approved and what has been paid; *please note that only the Grant Owner can submit payment requests for their grant*
- **Reports:** in this tab, you will have access to a series of standard reports that you can run on your grants and applications and where you can download grant data
- **Resources:** in this tab, you will have links to training documents, videos on specific topics and any reference materials to help with managing grants

You can return to the **Home** page at any time by clicking on **Home** or by clicking on the Church of England logo, top left of the screen.

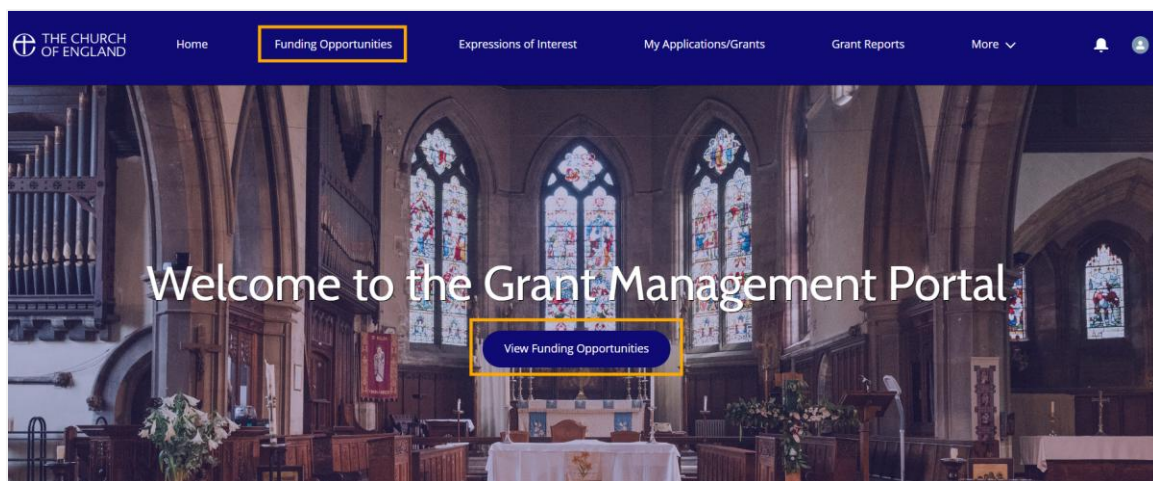
Funding Opportunities & Expressions of Interest

Viewing open Funding Opportunities



Click [here](#) for a short recording

Funding Opportunities are also called Funding Rounds. In this tab you will see all Funding Opportunities from NCI grant Teams that are open for applications. Click **Funding Opportunities** in the main navigation bar or click **View Funding Opportunities** button in the middle of the Home page screen.

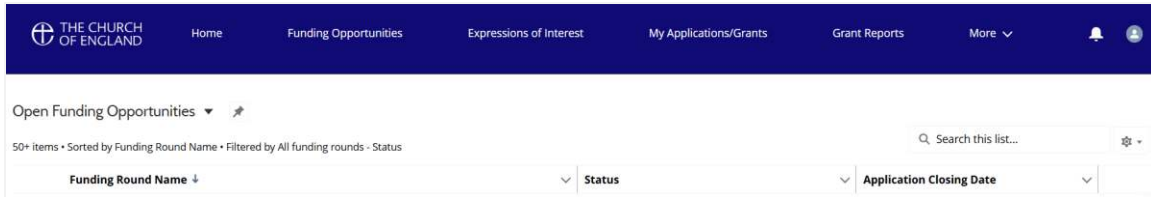


Under the Funding Opportunities tab, you will see a list of **Open Funding Opportunities**. To view a specific **Funding Opportunity**, click on its name. For further information on the

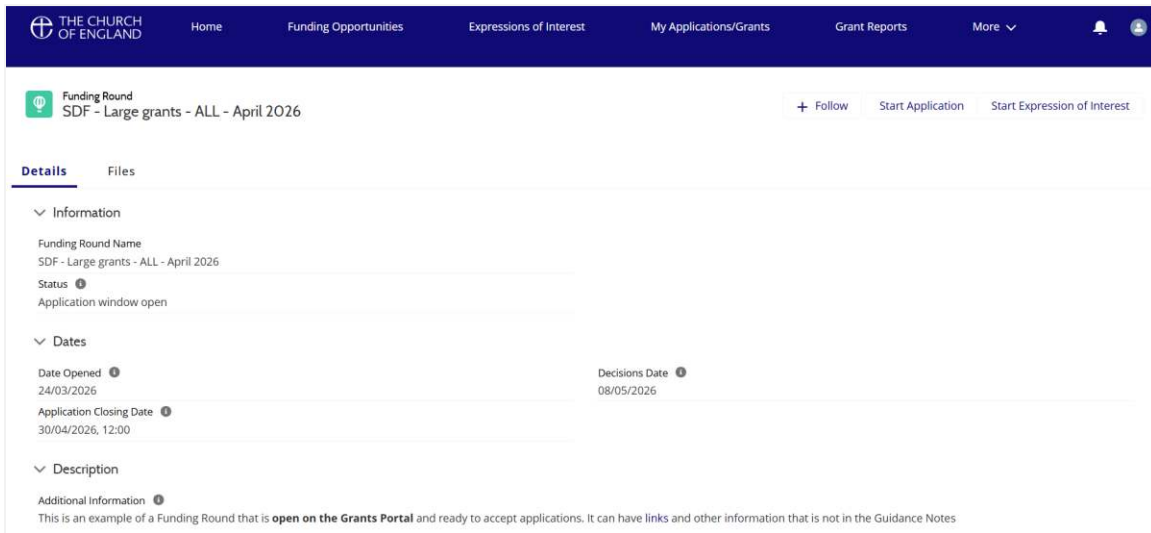
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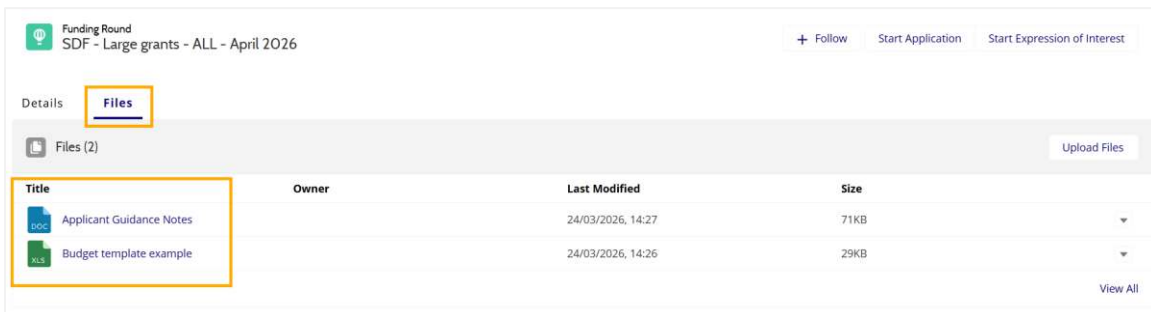
naming conventions, see [Funding Opportunities naming conventions](#) to identify relevant Funding Opportunities for your organisation type.



After opening a Funding Opportunity, all information is displayed in the **Details tab** including the Description and the Application Closing date.



Under the **Files** tab, you can find guidance on applying, what to consider, the type of information required, the steps you need to take in the system, and any supporting documentation that will be required, including a **Budget Template**.



To learn more about starting an application see [Applying for a Grant](#).

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Expressions of Interest

What is an Expression of Interest?

An Expression of Interest is used to register your interest in applying for a grant before completing the full application process. It provides an opportunity for you to present a high-level outline that can be reviewed and discussed with the NCI Grant Team before committing to the full application process.

Once an Expression of Interest is submitted, an email notification will automatically be sent to your organisation's Primary Contact, so they are aware of your interest in a particular Funding Round and to ensure there is internal support before a full application is completed.

How to complete an Expression of Interest

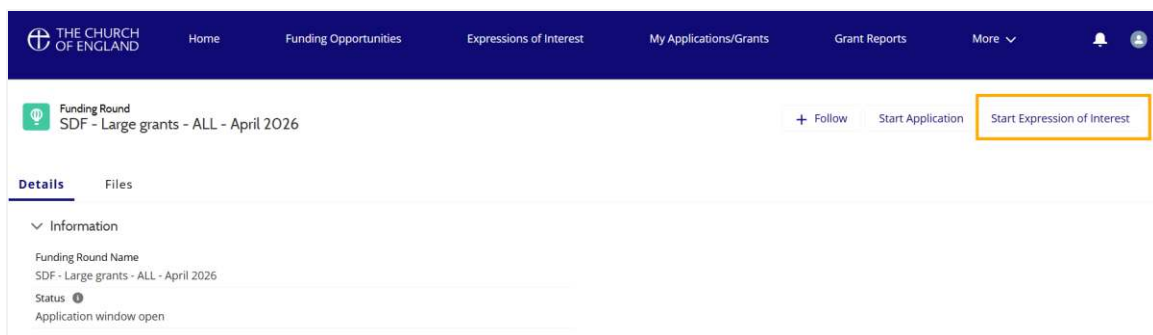


Click [here](#) for a short recording

To create an Expression of Interest, locate and open the Funding Opportunity, (see [Viewing open Funding Opportunities](#)).

Important: *Please be sure to read the Description of the Funding Round to see if you must submit an Expression of Interest or not. Not all Funding Rounds require this step. Please also check with your team, as some organisation may require all Users to submit an Expression of Interest before completing a full application.*

Click the **Start Expression of Interest** button located on the top right of the Funding Round page.



You will be presented with a screen to complete the following information:

- **Expression of Interest Name:** enter a unique name for the Expression of Interest that is relevant for the funding you are interested in.
- **Proposed Amount:** enter the amount of funding that you are considering applying for
- **Organisation:** click into Search Organisation and select your organisation.

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- **Proposed Start Date:** enter the date you would like the Grant to start, if approved
- **Proposed End Date:** enter the date you expect the Grant to complete, if approved
- **Description:** enter details of your proposed project/activity that you may be seeking a grant award to support

Click **Save** when complete. Please note that you can continue to update this information after saving.

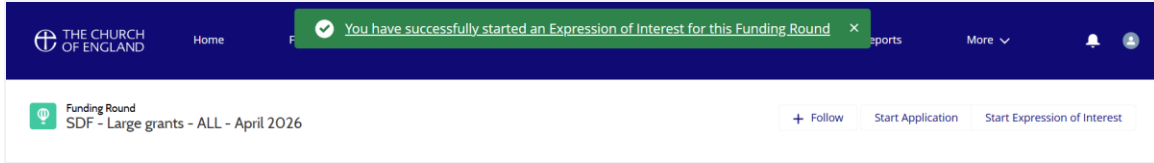
The screenshot shows a web form titled "Start Expression of Interest". At the top right, there is a legend: "* = Required Information". The form contains several fields:

- A text input field for "* Expression Of Interest Name".
- A search input field for "* Organisation" with a magnifying glass icon and a dropdown arrow.
- A text input field for "Proposed Amount" with a dropdown arrow.
- A date picker for "Proposed Start Date" with a calendar icon.
- A date picker for "Proposed End Date" with a calendar icon.
- A rich text editor for "Description" with a toolbar containing options for font face (Salesforce Sans), size (12), color, bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, outdent, link, image, and link icon.

At the bottom right of the form, there are two buttons: "Cancel" and "Save".

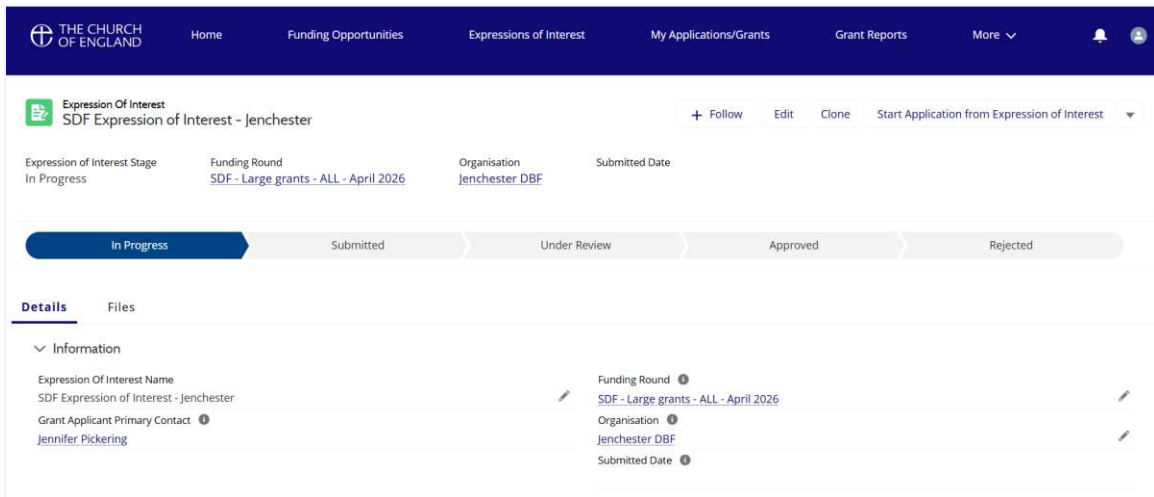
Once you have started your Expression of Interest and saved, a green success bar will appear at the top of the window. You can click on the hyperlink in that green bar, which will direct you to the draft Expression of Interest.

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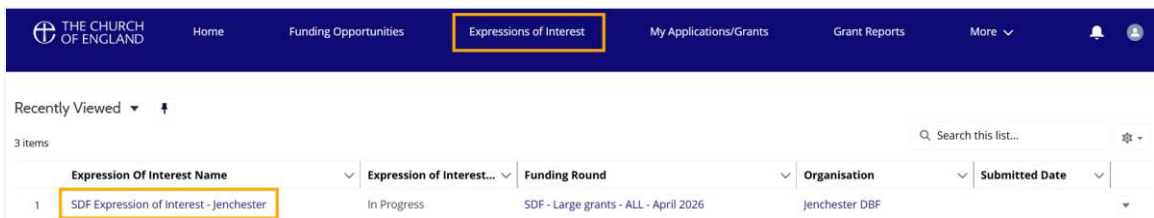
Otherwise, you can navigate to the **Expressions of Interest** tab on the Navigation menu. From there you will see a list of Expressions of Interest, and click on the name of the one you just created to open it. Make any updates to the description or the dates as you see fit. If you have a document to share, you can upload this on the Files tab, **ensuring any personal data has been redacted** (see [Options for redacting documents](#)).

You will see a status bar near the top of the page which will show you the status of your Expression of Interest. It will be set to **In Progress** as you add in information and make updates.



How to submit an Expression of Interest

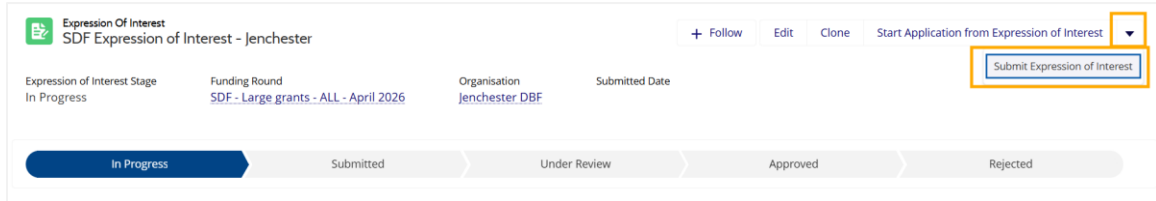
To submit an Expressions of Interest, go to the **Expressions of Interest** menu option in the main navigation. You will see the name of existing Expressions of Interest and its stage: i.e. *In Progress* (not yet completed and submitted), *Submitted* (being reviewed by the NCI Grant team), *Approved* (Approved by the NCI Grant team and ready to be progressed to Application).



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Select the Expressions of Interest you completed to open. Go to the drop down arrow on the right hand side of the screen and click **Submit Expression of Interest** from the list.



Once you have submitted, the status will change from **In Progress** to **Submitted**. Once your Expression of Interest is submitted, an **email notification** will automatically be sent to your organisation's **Primary Contact**, so they are aware of your interest in a particular Funding Round and to ensure there is internal support before a full application is completed. The email notification will have the subject heading: ***"Expression of Interest Submitted – [Funding Round Name]."***

What happens after an Expression of Interest has been submitted?

Once submitted, your Expression of Interest will be reviewed by the NCI Grant Manager. They will respond by either approving or rejecting the request in the system. You can see the progress of the Expression of Interest by viewing the status on the path component. If it is **Approved**, you can move forward with creating your application.

Please note: an approved Expression of Interest does NOT guarantee that a subsequent application will be approved, it is simply approval for you to complete and submit an Application.

Applying for a Grant

How to start an application from an approved Expression of Interest

Full applications can be started from an approved Expression of Interest. On the top right of the Expression of Interest, click the **Start Application from Expression of Interest** button. Enter the name of the Application/Grant and **Save**. Please check the Guidance Notes on the Funding Round for any specific name you need to use for your application. A green success bar will appear at the top of the screen – click the hyperlink on the bar to navigate straight to the new Application. Alternatively, go to the **My Applications / Grants** tab on the Navigation menu, under the My Applications tab, search for the name of your application and click on the Grant Name to open it up.

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Expression Of Interest
SDF Expression of Interest - Jenchester

+ Follow Edit Clone Start Application from Expression of Interest

Expression of Interest Stage	Funding Round	Organisation	Submitted Date
In Progress	SDF - Large grants - ALL - April 2026	Jenchester DBF	

In Progress Submitted Under Review Approved Rejected

How to start an application from a Funding Round

To apply for a grant, locate and open the Funding Opportunity, (see [Viewing open Funding Opportunities](#)). Go to the **Files** tab and open the **Guidance Notes**; these will provide more information about what is required in your application and what to complete in the system. You will also need to save a copy of the **Budget template** onto your computer, as you will need to complete this as part of your application.

How to start and complete an application



Click [here](#) for a short recording

Click on **Start Application** located on the right-hand side of the screen.

THE CHURCH OF ENGLAND Home Funding Opportunities Expressions of Interest My Applications/Grants Grant Reports More

Funding Round
SDF - Large grants - ALL - April 2026

+ Follow Start Application Start Expression of Interest

Details Files

Information

Funding Round Name
SDF - Large grants - ALL - April 2026

Status
Application window open

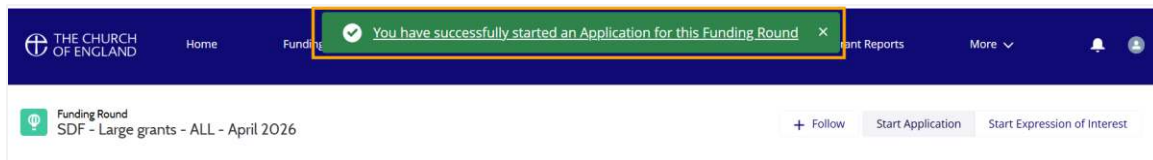
A **Start Application** window will appear. Complete all the fields:

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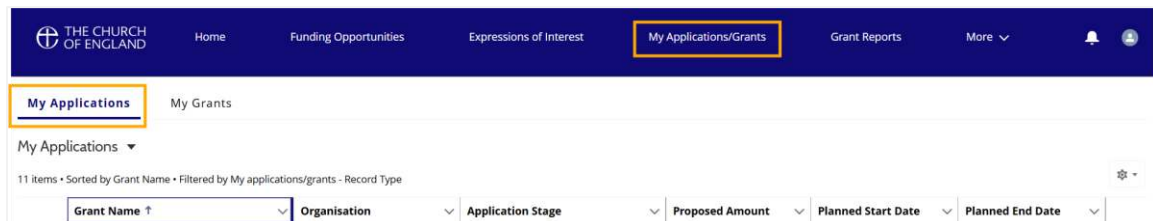
- **Grant name:** make this unique and easy to find again; this will be the name of your Grant, if your Application is approved; please check the Guidance Notes to see if a specific name is required on your application
- **Proposed amount:** the amount of funding that you are applying for
- **Planned Start Date:** enter the date you would like the project/activity to start
- **Planned End Date:** enter the date you expect the work/project to complete

Click **Save** to complete.

You will receive an on-screen notification to confirm that you have started an application.



To continue with your application, you can click on the (green) notification bar or alternatively click on **My Application/Grants** from the main navigation bar. Under the My Applications tab, your current applications will be displayed.



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Click on the name of the application to open. All of the information that you previously entered will be shown at the top of the page. Note the unique **Grant ID**. This will be the same ID for the whole lifecycle of this Application, and if approved, as a Grant, through to closure.

This is the **Details** tab. You can amend any of the information you previously entered by clicking on the pencil icon to edit; make the change and then click **Save** when complete. You can also click **Edit** to update a number of fields.

The screenshot shows the 'Details' tab for an application titled 'SDF Application Jenchester'. The application stage is 'Application In Progress'. Key details include: Organisation: Jenchester DBF, Proposed Amount: £5,000.00, Grant ID: SDF-774, Planned Start Date: 01/04/2026, and Planned End Date: 30/04/2027. A progress bar shows the current stage as 'Application In Progress'. The 'Details' tab is selected, showing information such as Grant Name, Full Grant Title, Grant ID (SDF-774), Organisation (Jenchester DBF), Grant Organisation Primary Contact, Funding Round (SDF - Large grants - ALL - April 2026), Application Stage (Application In Progress), and Parent Grant.

From the application screen, click on the **Narrative** tab. The Application Form will be displayed. You can navigate through the Application Form by clicking **Next** and **Previous** at the bottom of the screen to go to another page of the form. The Application Form will autosave as you enter information, so you can navigate back to the form at any time to make updates to your responses.

If you wish to complete the Application Form offline you can download a copy by clicking on the **Download** button and saving a copy as a Word document to your local computer.

The screenshot shows the 'Narrative' tab for the same application. The 'Narrative' tab is selected, and a 'Download' button is visible in the bottom right corner. The page displays the 'Narrative Application Response for SDF...' section, which is currently empty. Below this, there is a section titled 'Section A: Applicant and Church Buildings Support Officer Details' with instructions: '[Please give instructions here, for example: *Please complete this application form and use the budget tab to submit your budget. Unless you wish to do so you do not have to provide indicators and workplans for this application. Applications are for a maximum of [£xxx] and only applications from [Diocese/Parishes] will be considered*]'. A text input field for 'Name of Legal Entity(ies) (if different from above)' is also visible.

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Please note that you will need to copy and paste your answers from the downloaded version to the application form on the Grants Portal, as it is not possible for the system to upload the answers into the form automatically.

**Download Narrative Application Response for SDF Application
Jenchester**

Please confirm if you would like to download this submission as a Word Document. Note that any changes made to the word document should be entered manually into the online version before submitting.

Cancel Confirm

Please do not click ‘Submit Application for Approval’ at this stage, as you need to add details for your grant budget. The narrative information will automatically save and is ready to submit once your application is complete.

How to complete my budget template



Click [here](#) for a short recording

In addition to completing the Application Form, you will need to submit a budget. The budget template can be accessed from the **Files** tab of the Funding Opportunity that you are applying for. Please check the Guidance Notes to confirm what you need to complete for the Funding Round you are applying to, as some budget information may be captured in the application form.

Click on the **drop-down arrow** to the right-hand side of the Budget template file to download a copy to your local computer.

Funding Round
SDF - Large grants - ALL - April 2026 + Follow Start Application Start Expression of Interest

Details Files

Files (2) Upload Files

Title	Owner	Last Modified	Size	
Applicant Guidance Notes		24/03/2026, 14:27	71KB	Download
Budget template example		24/03/2026, 14:26	29KB	View File Details

The budget template is comprised of three sheets:

Instructions

Reference Lists

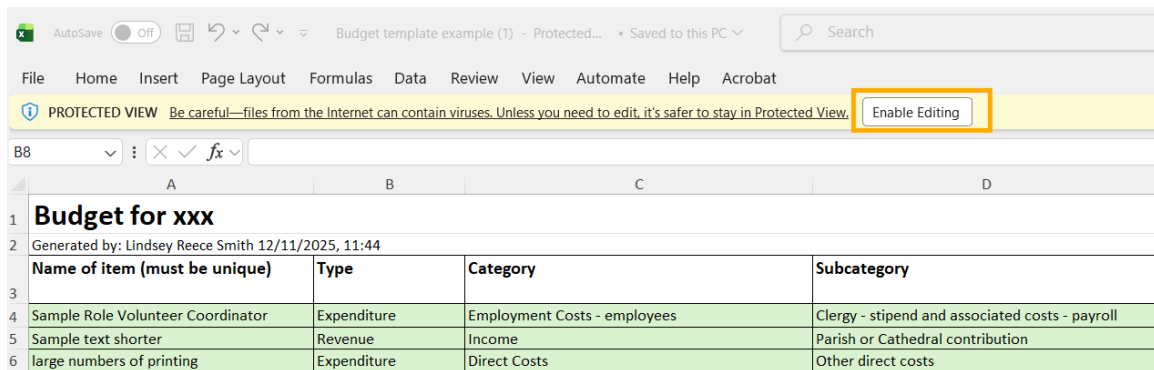
Quarterly budget template _ 3

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- **Instructions:** Instructions and guidance on how to complete the budget spreadsheet
- **Reference Lists:** Contains the list of expenditure / revenue categories and sub-categories that you pick when you enter your budget in the budget template sheet
- **Budget template:** This is where you will enter your budget – please note: there are different templates for budgets that are planned quarterly, six monthly and annually. This example is a quarterly budget. The name of the third tab will be different depending on the type of budget

When you first open the budget template in Excel it will be in a read-only format. If you are prompted, choose to open in edit mode. Alternatively click on the **Enable Editing** option that appears in the yellow bar just under the ribbon bar.



When completing the budget template please be aware that:

- **The Green columns must be completed, they are mandatory**
- **Blue columns are optional**

The budget template screenshot below contains examples of what should be completed in each of the columns. As you select the type of budget (Expenditure or Revenue) the template will give you options to select in the Category column. Again, depending on what you select, the Sub-Category column will give you options to select from.

What to complete in each column

- **Column A - Name of Item:** Enter a short description for the budget item
- **Column B – Type:** Using the drop-down list select the Type of **Expenditure** or **Revenue**
- **Column C – Category:** Using the drop-down list select the relevant category. What is displayed is dependent on your choice in Column B – Type
- **Column D – Subcategory:** Using the drop-down list select the relevant sub-category. What is displayed is dependent on your choice in Column C – Category
- **Column I – Amount Planned, (and additional Amount Planned columns):** Enter the amount planned to be spent for each budget item. If you have chosen to complete the blue columns for Cost per Unit and Planned Quantity the **Amount Planned** will populate automatically

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Budget for xxx							
Generated by: Lindsey Reece Smith 12/11/2025, 11:44							
Name of item (must be unique)	Type	Category	Subcategory	Planned Cost per Unit	Unit	Activity must link to set up impact	Q1 2026
Sample Role Volunteer Coordinator	Expenditure	Employment Costs - employees	Clergy - stipend and associated costs - payroll	50 000,00	employee		Planned Quar
Sample text shorter	Expenditure	Income	Parish or Cathedral contribution	30			
large numbers of printing	Revenue	Direct Costs	Other direct costs	1	booklet		

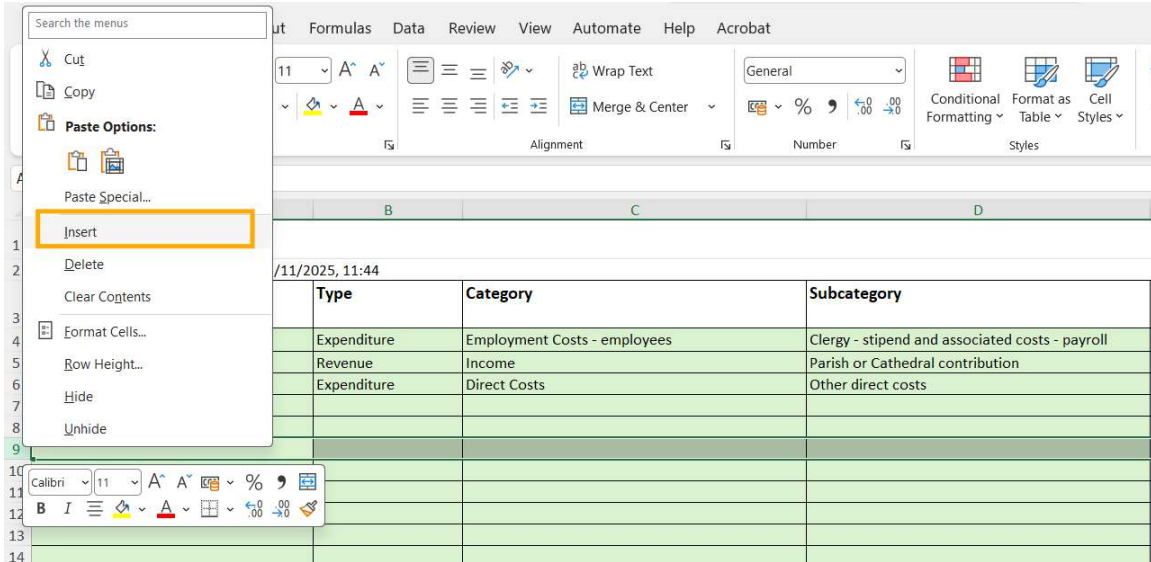
- **Column T – Total Amount:** Is calculated automatically based on the values added in the Amount Planned columns
- Totals are also provided for each column

	A	AB	AC	AD	AE	AG	AH
1	Budget for xxx						
2	Generated by: Lindsey Reece Smith 12/11/2025, 11:44						
3	Name of item (must be unique)	Q3 2028		Q4 2028		Total amount	
4	Sample Role Volunteer Coordinator	Planned Quantity	Amount Planned	Planned Quantity	Amount Planned	<i>Check for</i>	
5	Sample text shorter					12 000,00	
6	large numbers of printing		£50 000,00		£50 000,00	404 321,00	
7			£78 970,00		£78 970,00	755 716,00	
8						870,00	
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29			£50 000,00		£50 000,00	404 320,00	
30							
31	TOTAL (for reference only)		£128 970,00		£128 970,00		
32						1 577 227,00	

Adding additional rows to the budget spreadsheet

If you need to include additional rows into the budget sheet, please do so by inserting an entire row below one that you have completed. This way, formatting will be copied into the new row.

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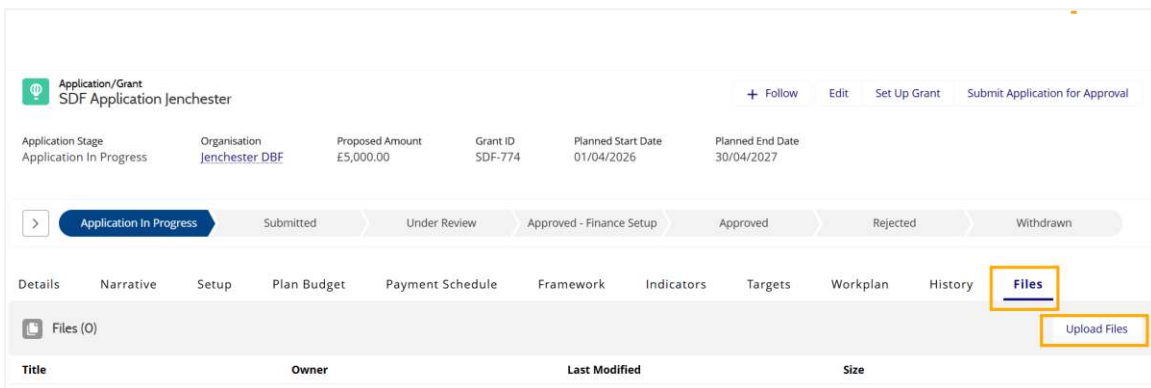
IMPORTANT: Please do not add additional columns to the spreadsheet or delete any columns.

How to upload my budget template to my application



Click [here](#) for a short recording on how to upload documents

Once the budget template has been completed, it can be uploaded along with any other additional files you wish to submit for the application. Locate and open the application from the **My Applications/Grants** menu option. Click on the **Files tab** and then click on **Upload Files**. When the files explorer window appears, navigate to the folder on your local computer where you have saved the budget template. Select the file and click **Open** to save it into the **Files tab** of the application. You can repeat this process to upload any additional files, **ensuring any personal data has been redacted** (see [Options for redacting documents](#)).



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Grants Portal Handbook

Please **DO NOT complete any information on any of the other tabs in the application screen** (e.g. Setup, Plan Budget, Payment Schedule etc.). These updates will be made for you by the NCI Grant Team.

How to submit my application

Once you have filled in the information about the Application in **Details** tab, completed the Application Form under the **Narrative** tab, and uploaded the updated **budget** template to the **Files** tab, you can now submit your application. From within the application page, click the **Submit Application for Approval** button on the top right of the page.

The screenshot shows the application page for 'SDF Application Jenchester'. At the top right, there are buttons for '+ Follow', 'Edit', 'Set Up Grant', and 'Submit Application for Approval' (highlighted with a yellow box). Below this is a table with the following data:

Application Stage	Organisation	Proposed Amount	Grant ID	Planned Start Date	Planned End Date
Application In Progress	Jenchester DBF	£5,000.00	SDF-774	01/04/2026	30/04/2027

Below the table is a progress bar with stages: Application In Progress (active), Submitted, Under Review, Approved - Finance Set..., Approved, Rejected, and Withdrawn. At the bottom is a navigation menu with tabs: Details (active), Narrative, Setup, Plan Budget, Payment Schedule, Framework, Indicators, Targets, Workplan, History, and Files.

Note that once the application has been submitted, **the application will be locked**, and you will not be able to make any changes, so please check everything is complete before you submit.

Click **Proceed** if you wish to continue with the submission. The screen will display that your application has been successfully submitted. Click **Finish** to complete.

Submit Application for Approval

Would you like to submit this application **SDF Application Jenchester** and it's related records for approval? This application and its related records will be locked from editing after they are submitted. By submitting this application, you confirm you have your organisations approval for this application.

Proceed

Submit Application for Approval

Success! Your Application and all it's related records were submitted for approval. A copy of this email will automatically sent to the Primary contact of your Organisation **jennie.pickering@hi-qconsulting.co.uk**

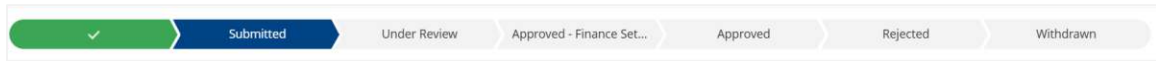
Finish

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Grants Portal Handbook

What happens after my application has been submitted?

Your application will be reviewed by the NCI Grant Manager and you will notice the status of your application change from '**Submitted**' to '**Under Review**'. If the NCI Grant Manager needs any further information, they can unlock your application and update the **Application Stage** back to '**Application In Progress**' and provide you with guidance on any updates required.



Once a decision has been made by the approval panel or grant stream board, you will be notified of the outcome. This will be sent from the Grant System from an email account called noreply@grants.churchofengland.org.

The status of approved applications will change to '**Approved – Finance set up**' to enable the NCI Finance Team to update your application with key financial data, ready for payments to be made. You will then notice the status of your application change to '**Approved**'.

Your authorised signatories should receive a **Grant Agreement** to sign; again, this email is sent from the Grant System from an email account called noreply@grants.churchofengland.org. As each signatory signs the Grant Agreement, this is saved onto the Grant record.

Once any pre-requirements have been fully met, your Application will transform into a Grant and your information will transfer over. The Grant will be in the status '**Grant in Preparation**', while the NCI Grant team sets up all the relevant information for you. The NCI Grant Team may liaise with you as your new Grant is set up in the system.

As soon as the grant has been set up for you and the Grant Agreement has been fully signed and saved, the status will change to '**Active**'. This is now an active grant and is ready for your first payment, subject to the terms and conditions agreed in the Grant Agreement.

What happens if my application is rejected?

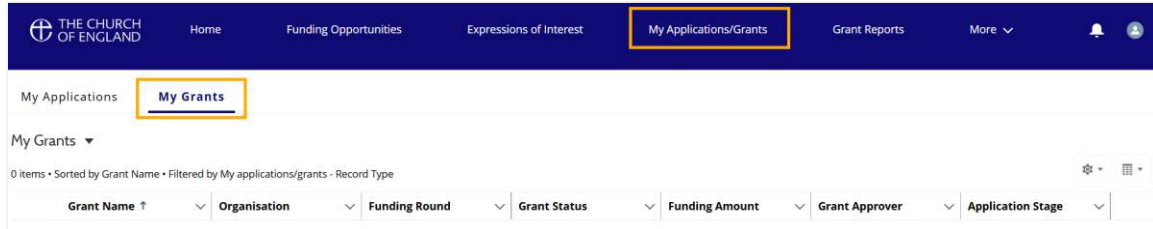
If your application is rejected, you will be notified in writing in an **Outcome Letter**, which will be sent from the Grant System from an email account called noreply@grants.churchofengland.org. The status of your application will change to '**Rejected**'. If you want to re-apply for grant funding, you will need to start a new application from the open Funding Round.

Grants Portal Handbook

Managing active grants

Viewing my Grant information and documentation

Click onto the **My Applications / Grants** tab on the Navigation bar on the top of the page. You will see row tabs – **My Applications** and **My Grants**. Navigate to the My Grants tab, and you will see a list of the Grants and applications that you own. Click on the Grant Name to open up a Grant.



There are several tabs on a Grant. In this first phase, you will not be expected to interact with all of them. This guide will show you which ones you will be using going forward.

At any point, you will be able to see the documents you uploaded previously for your application on the **Files** tab of the grant. Navigate to the Files tab and view your Files there. Please note that the **Narrative** Application form you filled in during your application will not be visible on your grant.

Monitoring Reports

Monitoring provides a clear auditable trail of how NCI grant awards are being used and allows for reporting to donors, stakeholders and the wider community. Monitoring is essential for demonstrating responsible stewardship of resources and helps to refine strategies and improve future project design.

What monitoring will I need to complete?

The monitoring and reporting requirements for each grant will be discussed and agreed with you after the Approval Panel has approved your application. The NCI Grant Team you are working with will set up monitoring for you within the system.

You may be required to complete a Monitoring Report before a payment can be requested.



Click [here](#) for a short recording

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Grants Portal Handbook

How to find my Monitoring Reports

From the main navigation bar select **My Applications/Grants** then select the **My Grants tab**. From the list of grants shown, click on the name of the grant that you will be submitting the monitoring report for.

THE CHURCH OF ENGLAND Home Funding Opportunities Expressions of Interest **My Applications/Grants** Grant Reports More

My Applications **My Grants**

My Grants

1 item • Sorted by Grant Name • Filtered by My applications/grants - Record Type

Grant Name	Organisation	Funding Round	Grant Status	Funding Am...	Grant Ap...	Application...
Jenchester SDF Grant for April 2026	Jenchester DBF	SDF - Large grants - ALL - April 2026	Grant In Preparation	£1,000.00		Approved

The schedule of monitoring reports for the grant can be seen in the **Setup tab** under the section **Monitoring Reports**. Click on the name of the monitoring report that you need to update to open it.

Application/Grant
Jenchester SDF Grant for April 2026

Organisation: Jenchester DBF | Grant Status: Grant In Preparation | Funding Amount: £1,000.00 | Active? | Grant Start Date: 01/05/2026 | Grant End Date

Grant In Preparation | Withdrawn | Active | Closed | Evaluation

Details **Setup** | Plan Budget | Report Budget | Payments | Framework | Indicators | Targets | Results | Workplan | Files

Tag Thematic Areas
A More Diverse Church X A Younger Church X Type To Search

Tag Geographic Areas
Rochester: St Peter Parish Cent... X Type To Search

Monitoring Reports (5) New

Monitoring Report ID	Link	Monitoring Report Start Date	Monitoring Report End Date
RP-00864	Q1 2026-27	01/04/2026	30/06/2026
RP-00865	Q2 2026-27	01/07/2026	30/09/2026

How to update my Monitoring Report

Once the monitoring report has opened, click on the **Narrative tab**. Please answer the questions and provide feedback requested in the narrative form, being careful to not include any personal data.

Grants Portal Handbook

Monitoring Report Q1 2026-27

+ Follow Download Financial Report Upload Financial Report Submit Report for Approval

Report Type: Quarterly | Monitoring Report Start Date: 01/04/2026 | Monitoring Report End Date: 30/06/2026

Details **Narrative** Results Report Expenditure History Files

Narrative Monitoring Report Respons... **Download**

Overview

Please use this template for all your grant reporting

What has been your biggest achievement since the last Monitoring Report?

Section 1 Challenges

What support could be provided to you in the coming months?

Salesforce Sans 12 B I U S

If you wish to complete the Monitoring Report narrative form offline you can download a copy by clicking on the **Download** button and saving a copy to your local computer.

Download Narrative Monitoring Report Response for RP-00864

Please confirm if you would like to download this submission as a Word Document. Note that any changes made to the word document should be entered manually into the online version before submitting.

Cancel **Confirm**

Please note that you will need to **copy and paste your answers** from the downloaded version to the Monitoring Report narrative form on the portal, as it is not possible for the system to upload the answers into the form automatically.

Once you have completed the Monitoring Report narrative form, click on the **Results tab**. **Please note not all Grants will require reporting of results against targets.** If your NCI Grant Manager has added indicators with targets for you to report against, you will see them here. Please enter results against the indicators' targets for this period. If this tab is empty, you can move to the next tab.

Grants Portal Handbook

Monitoring Report Q1 2026-27

Report Type: Quarterly | Monitoring Report Start Date: 01/04/2026 | Monitoring Report End Date: 30/06/2026

Details | Narrative | **Results** | Report Expenditure | History | Files

Monitoring Report: Q1 2026-27 | Geographic Area: Rochester: St Peter Parish Centre PCC

PROJECT INDICATOR	TARGET	RESULT
75% of regular attendees report feeling "more connected to their community" after 6 months.	75 %	80 %
At least 40 unique visitors per month; 4 community partnership sessions held per quarter.	40	20
Long-term reduction in local reported loneliness scores (via census or parish surveys).	50	44

How to report budget expenditure

Here is where you will report your actual spend versus your budgeted spend. The NCI Grants team will have taken the information from the excel budget you provided with your application and populated the budget in the system. Click on the **Report Expenditure** tab and enter the **Amount Actual** values for this period.

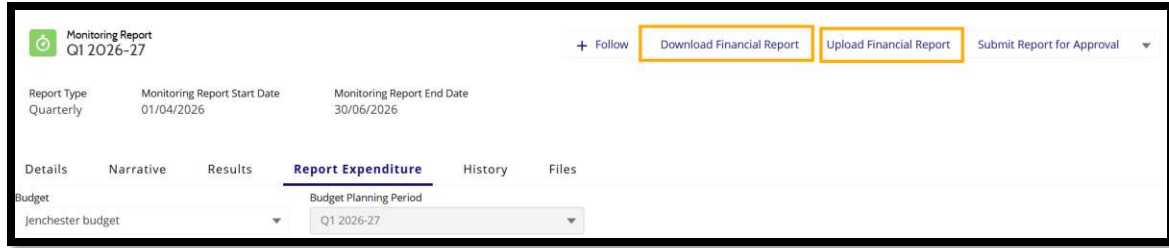
Details | Narrative | Results | **Report Expenditure** | History | Files

Budget: Jenchester budget | Budget Planning Period: Q1 2026-27

Name	Subcategory	Planned Budget	Expenditure To date	Q1 2026-27
Total		£440.00	£650.00	£650.00
Direct Costs		£40.00	£50.00	£50.00
Travel Expenses		£40.00	£50.00	£50.00
Employment Costs - employees		£400.00	£600.00	£600.00
Volunteer Coordin...		£400.00	£600.00	£600.00

If you wish to complete the expenditure updates offline you can download a copy by clicking on the **Download Financial Report** button and saving a copy to your local computer.

Grants Portal Handbook



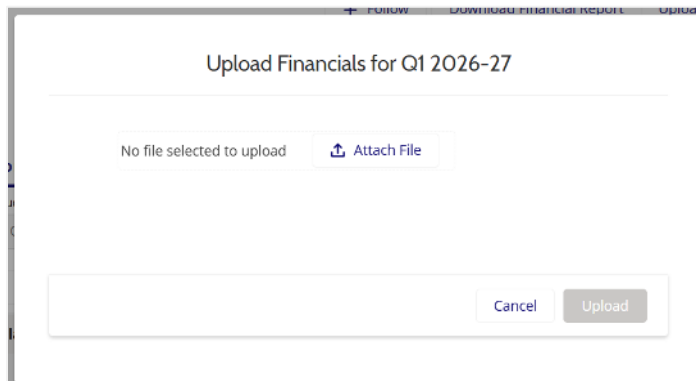
You will note that the financial report is similar in format to the budget template. The same guidance on completing the financial report applies, see [How to report budget expenditure](#).

Enter the **Actual Amounts** into Column I.

	A	B	C	D	E	F	G	H	I
1	Jenchester SDF Grant for April 2026 - Q1 2026-27								
2	Generated by: Jennie Pickering 07/04/2026, 16:40								
3	Name	Type	Category	Subcategory	Actual Cost per Unit	Unit	Activity	Budget	Amount Actual
4	Travel Expenses	Expenditure	Direct Costs					Jenchester budget	50.00
5	Volunteer Coordinato	Expenditure	Employment Costs - e					Jenchester budget	600.00
6									
7									
8									

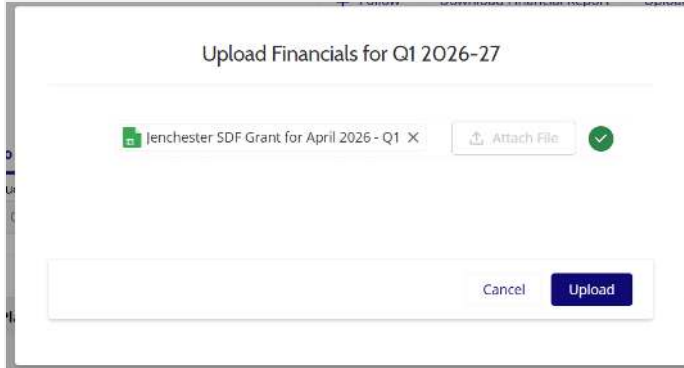
When you have completed the updates to the financial report **Save** the changes. The financial report can now be uploaded into the system.

In the system, navigate to the **Monitoring Report, Reporting Expenditure tab**. Click **Upload Financial Report**. Click **Attach File** and locate the Financial Report spreadsheet on your local computer. Click **Open**.

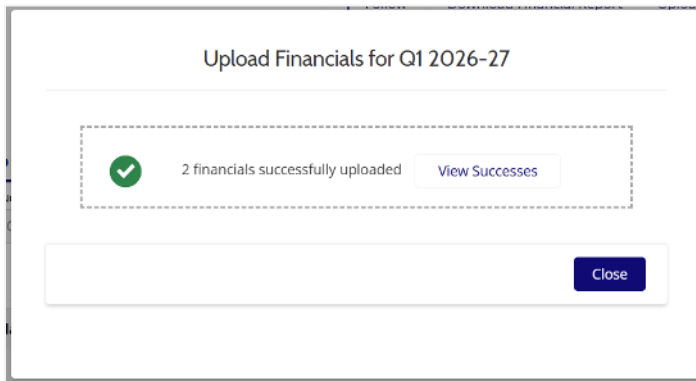


Once the file has been applied, click **Upload** to complete.

Grants Portal Handbook



If the upload has been successful, you will see a screen notifying you that the financials have been uploaded successfully. If errors have occurred, you will see a screen notifying you – use the **View Errors** link to view the errors. The Instructions tab of the Financial Report spreadsheet that you are uploading provides guidance on how to deal with errors.



When the Financial Report has been successfully uploaded, the figures in the **Report Expenditure tab** will be updated automatically. If they are not updating immediately, refresh the page of your browser, using the refresh icon next to the URL in your browser.

How to submit my Monitoring Report for approval

Once you have completed the Monitoring Report narrative form, results (if required) and report expenditure, it can be submitted for approval.

With the Monitoring Report record open, click **Submit Report for Approval** button in the top right-side of the screen. Note that once you submit for approval, no further edits can be made. Please also note, your Monitoring Report can only be submitted by the Grant Owner. Other 'all grants' Users in your organisation can make the updates and upload files.

Grants Portal Handbook

Monitoring Report Q1 2026-27

+ Follow Download Financial Report Upload Financial Report **Submit Report for Approval**

Report Type: Quarterly | Monitoring Report Start Date: 01/04/2026 | Monitoring Report End Date: 30/06/2026

Details Narrative Results **Report Expenditure** History Files

Budget: Jenchester budget | Budget Planning Period: Q1 2026-27

You will see a confirmation message. Click **Proceed**. You will then see a screen notifying you to confirm that the submission was successful. Click **Finish**.

Submit Report for Approval

Would you like to submit this report (Q1 2026-27) and its related records for approval? This report and its related records will be locked from editing after they are submitted.

Proceed

Submit Report for Approval

Success! Your Monitoring Report and all its related records were submitted for approval. An email will be sent to [redacted] when the Grant Approver approves or rejects your report.

Finish

You will note that the **Monitoring Report Status** will automatically update from '**Not Started**' to '**Submitted**'.

Monitoring Report Q1 2026-27

+ Follow Download Financial Report Upload Financial Report Submit Report for Approval

Report Type: Quarterly | Monitoring Report Start Date: 01/04/2026 | Monitoring Report End Date: 30/06/2026

Details Narrative Results Report Expenditure History Files

Information

Monitoring Report Name	Q1 2026-27	Application/Grant	Jenchester SDF Grant for April 2026
Monitoring Report ID	RP-00864	Available for Financials	✓
Parent Monitoring Report		Monitoring Report Status	Submitted
Report Type	Quarterly	Monitoring Report Length	90.00
Grantee Primary Contact	Jennifer Pickering	Grant Approver	

What happens after my Monitoring Report has been submitted?

The NCI Grant Team will review the information you have provided on the Monitoring Report. Progress of the review can be viewed in the **History tab** of the Monitoring Report. If the NCI Grant Team requests amendments or further information to be added to the

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Monitoring Report, they will mark the **Monitoring Report Status** as '**Rejected – further updates required**' which will then allow you to edit. They will contact you to discuss.

The screenshot shows a 'Monitoring Report' for 'Q1 2026-27'. At the top right, there are buttons for '+ Follow', 'Download Financial Report', 'Upload Financial Report', and 'Submit Report for Approval'. Below this, a table lists report details: Report Type (Quarterly), Monitoring Report Start Date (01/04/2026), and Monitoring Report End Date (30/06/2026). A navigation bar includes 'Details', 'Narrative', 'Results', 'Report Expenditure', 'History', and 'Files'. The 'Details' section is expanded to show 'Information' with fields for Monitoring Report Name, ID, Parent Monitoring Report, Report Type, and Grantee Primary Contact. On the right, corresponding fields for Application/Grant, Available for Financials, Monitoring Report Status, Monitoring Report Length, and Grant Approver are shown. The 'Monitoring Report Status' field is highlighted with an orange box and contains the text 'Rejected - Further Updates Required'.

If edits/ further information is included, you can re-submit for approval by clicking on **Submit Report for Approval** (top right-hand side of the Monitoring Report screen) again.

Payments

Your payment schedule

The Payment Schedule will have been set up on your Grant by the NCI Grants team. To navigate to the Payment Schedule - from the main navigation bar select **My Applications/ Grants** then select the **My Grants** tab. From the list of grants shown click on the name of the grant to open it. On the Grant, navigate to the **Payments** tab. Review the Payment(s) which appear with the scheduled date(s).

IMPORTANT:

- Payments can only be requested when a Grant is in an **Active** Status
 - To determine if your Grant is active, navigate to the Grant record and review the Grant Status field or the path component on the top of the page. If these say Active, then you know that the Grant is ready for payment requests
- Payments can only be requested by the **Grant Owner**. If you are not the Grant Owner, you can add a file to the Payment record, however, you will not be allowed to request a payment in the system, and you will receive an error message.



Click [here](#) for a short recording

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Application/Grant
Jenchester SDF Grant for April 2026

Organisation: Jenchester DBF | Grant Status: Active | Funding Amount: £1,000.00 | Active? | Grant Start Date: 01/05/2026 | Grant End Date:

Progress: [Active] [Closed] [Evaluation]

Details | Setup | Plan Budget | Report Budget | Payments | Framework | Indicators | Targets | Results | Workplan | Files

Information

Grant Name: Jenchester SDF Grant for April 2026 | Grant Status: Active

Full Grant Title: Jenchester SDF Grant for April 2026 | Funding Round: SDF - Large grants - ALL - April 2026

System Information

Owner: Jennie Pickering

Created By: Jennie Pickering, 26/03/2026, 10:44

Last Modified By: , 07/04/2026, 17:08

Framework Locked: | Indicators Locked: | Narratives Locked:

How to view Scheduled Payments

To see all payments that are due now or in the future (scheduled payments) for all Grants, these can be viewed via the **Payments** tab in the main navigation bar. Scheduled payments for all grants will be displayed here and can be opened by clicking the **Payment Name**.

THE CHURCH OF ENGLAND | Home | Funding Opportunities | Expressions of Interest | My Applications/Grants | Grant Reports | **Payments** | More

All | 10 items • Sorted by Payment Name • Filtered by All payments | Search this list...

	Payment Name	Status	Amount	Percent Of Fund...	Scheduled Date	Grant	Monitoring Report
1	D-0357	Scheduled	£250.00	25.00%	01/05/2026	Jenchester SDF Grant for April 2026	
2	D-0358	Scheduled	£250.00	25.00%	01/11/2026	Jenchester SDF Grant for April 2026	
3	D-0359	Scheduled	£250.00	25.00%	01/05/2027	Jenchester SDF Grant for April 2026	
4	D-0360	Scheduled	£250.00	25.00%	01/11/2027	Jenchester SDF Grant for April 2026	

Alternatively, you can navigate to a specific grant by clicking **My Applications/Grants** in the main navigation bar, clicking on the **My Grants** tab and then clicking the name of the Grant.

From within the grant screen, click the **Payments** tab to view all payments and their statuses for the grant. Click on the **Payment Name** to open.

Grants Portal Handbook

The screenshot shows the 'Application/Grant' page for 'Jenchester SDF Grant for April 2026'. The grant is in an 'Active' state. A progress bar at the top indicates the current stage is 'Active', with previous stages 'Submitted' and 'Approved' completed. The 'Payments' tab is highlighted in the navigation menu. Below the navigation, a 'Payments (4)' section is visible, containing a table of scheduled payments.

Payment Name	Amount	Status	Date Paid
D-0357	£250.00	Scheduled	
D-0358	£250.00	Scheduled	
D-0359	£250.00	Scheduled	
D-0360	£250.00	Scheduled	

Check for Monitoring Report before requesting payment

Requesting a scheduled payment that is dependent on a completed monitoring report should not be actioned until the **Monitoring Report Status** displays either 'Submitted' or 'Approved'. The **Monitoring Report Status** can be viewed via the payments **Details** tab by clicking on the **Monitoring Report** name to open the report. The **Monitoring Report Status** will be displayed.

See [How to update my monitoring report](#) if you need to complete a monitoring report.

The screenshot shows the 'Payment D-0357' details page. The payment is scheduled for £250.00. Under the 'Information' section, the 'Monitoring Report' field is highlighted with a red box, showing the ID 'RP-00864'. Other fields include 'Grant ID: SDF-765' and 'Status: Scheduled'.

How to upload supporting documentation to a Payment request



Click [here](#) for a short recording

Before requesting a payment, please upload any supporting documentation, **ensuring any personal data has been redacted** (see [Options for redacting documents](#)). From within the payment screen click the **Files** tab, then **Upload Files**. Locate the required files on your local computer and then click **Open**

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Grants Portal Handbook

Payment D-0357

+ Follow Submit Payment Request Edit

Organisation Name	Grant	Grant ID	Amount	Status
Jenchester DBF	Jenchester SDF Grant for April 2026	SDF-765	£250.00	Scheduled

Details Files History

Files (0) Upload Files

Title	Owner	Last Modified	Size
-------	-------	---------------	------

How to submit a Payment request

From within the payments screen click **Submit Payment Request** which can be found in the top right-hand corner.

Payment D-0357

+ Follow Submit Payment Request Edit

Organisation Name	Grant	Grant ID	Amount	Status
Jenchester DBF	Jenchester SDF Grant for April 2026	SDF-765	£250.00	Scheduled

Details Files History

Submit Payment Request

This Payment is associated with a Monitoring Report **Q1 2026-27**. It is currently in the Status **Rejected**. Please note that if you proceed with requesting a Payment associated with a Monitoring Report which is not yet Approved, the Payment may be delayed.

The Payment Amount *Scheduled* is **£250**.

Please enter the Payment Amount **Requested** below:

Requested Payment Amount

£200.00

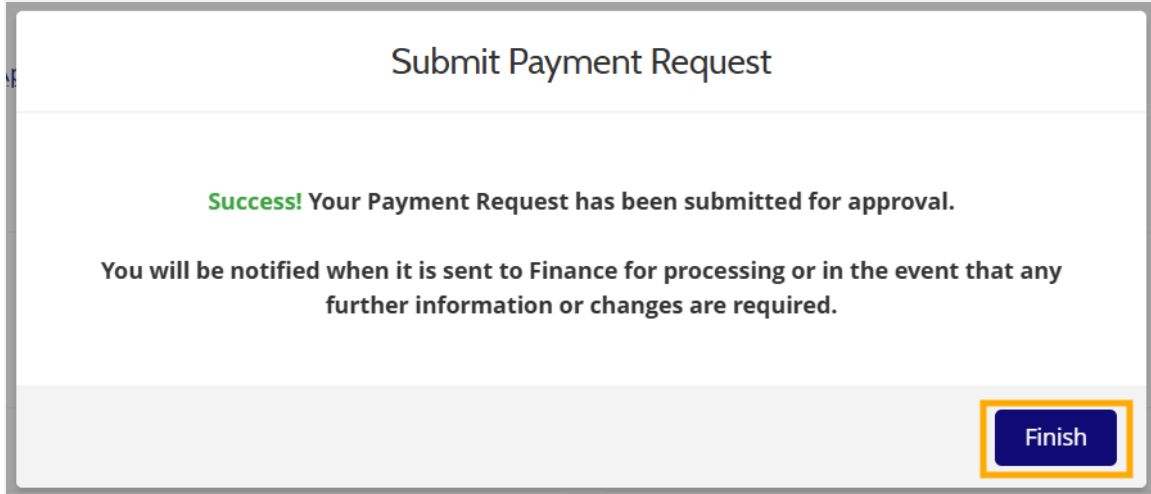
Would you like to submit this Payment Request for approval? If so, click "Proceed."

Proceed

A new window will open displaying the Payment Amount Scheduled. Enter your **Requested Payment Amount** and then click **Proceed**.

Please note: you can request an amount that is higher or lower than the scheduled amount, in agreement with the Grant Team. On the next screen, Click **Finish**.

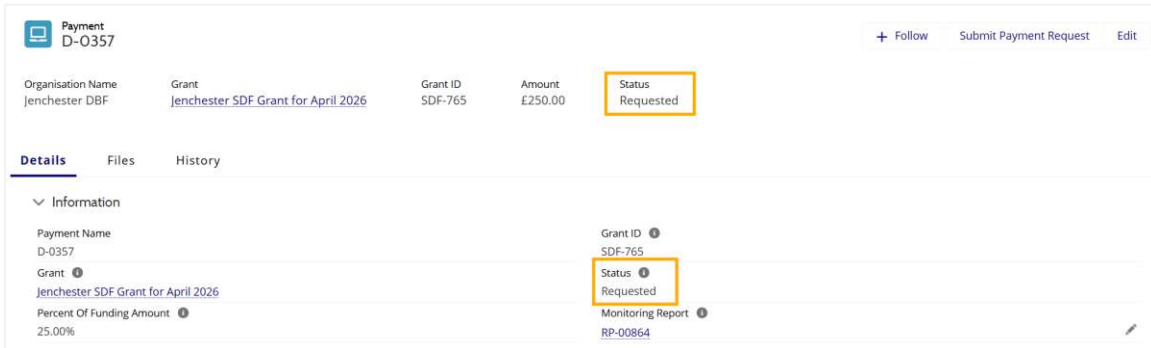
Grants Portal Handbook



Note in this example that the associated Monitoring Report has 'Rejected'. Payment will not be processed until the Monitoring Report has been 'approved'.

What happens after a payment request has been submitted?

The status of the payment will change to '**Requested**'. The NCI Grant Team will review the payment request together with the Monitoring Report (if applicable) and any supporting information you have uploaded.



Once approved the payment Status will change to '**Approved**'. The approved payment request will then be passed to the NCI Finance Team to process. When the payment is approved, the Grant Owner will receive an **email** informing them that the Payment has been approved. If the Payment is rejected, the Grant Owner will receive an email informing them.

Grants Portal Handbook

The screenshot displays a payment record for 'Payment D-0357'. At the top right, there are buttons for '+ Follow', 'Submit Payment Request', and 'Edit'. Below this, a summary table lists: Organisation Name (Jenchester DBF), Grant (Jenchester SDF Grant for April 2026), Grant ID (SDF-765), Amount (£250.00), and Status (Approved). The 'Status' field is highlighted with a yellow box. Below the summary, there are tabs for 'Details', 'Files', and 'History'. The 'Details' tab is active, showing an 'Information' section with fields for Payment Name (D-0357), Grant (Jenchester SDF Grant for April 2026), Percent Of Funding Amount (25.00%), Grant ID (SDF-765), Status (Approved), and Monitoring Report (RP-00864). The 'Status' field in the details section is also highlighted with a yellow box.

If you have requested an amount that is higher or lower than the original, scheduled amount, future payments on your payment Schedule will be adjusted so that your payments always equal the total Funding Amount.

When the NCI Finance Team has processed the payment the Status will change to **'Paid'**. Please note that payment may still take **up to 30 days** to reach your bank account.

This screenshot is identical to the one above, but the 'Status' field in both the summary table and the details section is now 'Paid' and highlighted with a yellow box.

Grant Changes

How to request changes to a Grant



Click [here](#) for a short recording

Once your Grant is active, there may come a time where you need to request a Grant Change for a multitude of reasons.

Navigate to the **My Applications / Grants** tab, on the **My Grants** tab, select the relevant Grant.

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Grants Portal Handbook

Application/Grant
Jenchester SDF Grant for April 2026

[+ Follow](#) [Edit](#) [Set Up Grant](#)

Organisation
Jenchester DBF

Grant Status
Active

Funding Amount
£1,000.00

Active?

Grant Start Date
01/05/2026

Grant End Date

> ✓ ✓ Active Closed Evaluation

Details Setup [Plan Budget](#) [Report Budget](#) [Payments](#) [Framework](#) [Indicators](#) [Targets](#) [Results](#) [Workplan](#) [Files](#)

Tag Thematic Areas

A More Diverse Church X A Younger Church X Type To Search

Tag Geographic Areas

Rochester: St Peter Parish Cent... X Type To Search

Monitoring Reports (5) [New](#)

Monitoring Report ID	Link	Monitoring Report Start Date	Monitoring Report End Date
RP-00864	Q1 2026-27	01/04/2026	30/06/2026
RP-00865	Q2 2026-27	01/07/2026	30/09/2026
RP-00866	Q3 2026-27	01/10/2026	31/12/2026
RP-00867	Q4 2026-27	01/01/2027	31/03/2027
RP-00868	Q1 2027-28	01/04/2027	30/04/2027

[View All](#)

Budgets (1) [New](#)

Name	Budget Status	Planned Expenditure	Actual Expenditure
Jenchester budget		£1,760.00	£10,640.00

[View All](#)

Grant Changes (0) [New](#)

Under the Setup tab, on the **Grant Changes** related list, click **New**. Fill in all the relevant information about your proposed Grant Change and save. Please include enough detail in the **Summary of Grant Change box** and the **Rationale** box to enable the NCI Grant Team to make a decision on your requested change.

Grants Portal Handbook

New Grant Change

* = Required Information

Information

* Grant Change Name

⊗ |

Complete this field.

Grant

📌 Jenchester SDF Grant for April 2026 ✕

Type i

--None-- ▼

Proposed New End Date i

📅

Further Details

Summary of Grant Change i

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B I U ↺ ☰ ☰ ☰ ☰

☰ ☰ ☰ 🔗 🖼️ 🔗

Rationale i

Salesforce Sans ▼ 13 ▼ ■

B I U ↺ ☰ ☰ ☰ ☰

☰ ☰ ☰ 🔗 🖼️ 🔗

Cancel
Save & New
Save

How to submit a Grant Change for approval

Once the Grant Change has been created, and you've added all necessary information, you can submit the Grant Change for approval. On the top right corner, click the **Submit for Approval** button.

📌 Grant Change
Roof Repair - Costed Extension 2026

+ Follow Edit Clone Submit For Approval

Grant	Type	Status
Jenchester SDF Grant for April 2026	Costed Extension	Draft

Details | History | Files

▼ Information

Grant Change Name Roof Repair - Costed Extension 2026 ✎	Grant Jenchester SDF Grant for April 2026 ✎
Type i Costed Extension ✎	
Proposed New End Date i 01/06/2028 ✎	

▼ Further Details

Summary of Grant Change i This amendment provides a Costed Extension to the existing 'Cathedral Sustainability & Maintenance' project. The grant period is extended by 9 months (New End Date: June 2028), with an additional capital injection of £2,000 . This brings the total project commitment to £3,000 . All original KPIs regarding structural integrity remain in place, with the addition of one new reporting milestone for winter energy efficiency. ✎	Rationale i The extension is required due to a 15% increase in the cost of specialist heritage materials (specifically lead and lime mortar) since the original 2024 budget was set. Additional funds will cover the deficit in material costs, while the time extension allows for the completion of masonry work delayed by the procurement lag. ✎
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The NCI Grant team will be notified of your request and review the change. Once the NCI Grant Team have come to a decision, they will send an email to the Grant Owner to inform them of the approval or rejection.

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Changing the owner of the Grant

To change the owner of a Grant, please email GrantPortalSupport@churchofengland.org and this will be updated for you.

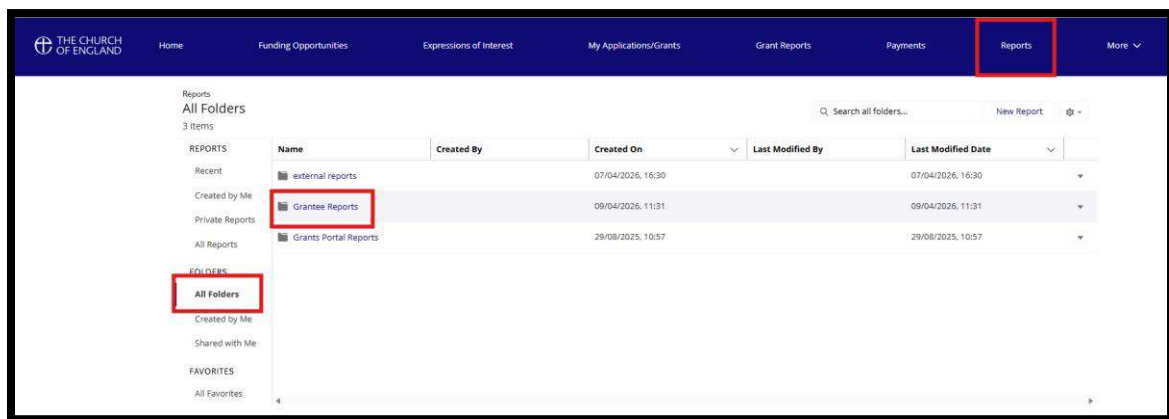
How to use Reports



Click [here](#) for a short recording

Within the Grants Portal you will find a number of standard reports that you can run on the grants and applications you are authorised to see.

Navigate to the **Reports** tab on the navigation bar. In the left sidebar, select **All Folders**, and open the **Grantee Reports** folder. Here you will find a list of reports created for you to help you view summarised information of your Applications and Grants.



For the launch, there are five reports available:

- All grants information, which includes applications and grants for your Organisation
- Grant changes
- Upcoming payments and cashflow
- Monitoring Reports
- Recent applications

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EXT-1 All grants information	Basic information about each grant	Grantee Reports
EXT-5 Grant Changes	Gives the most recent grant changes and those in progress	Grantee Reports
EXT-2 Upcoming payments and	To view how many grants we have and their upcoming payments	Grantee Reports
EXT-3 Monitoring Reports	To view grants that have monitoring reports due	Grantee Reports
EXT-4 Recent Applications	Applications made within the last six months, including those which are approved	Grantee Reports

How to filter the results from a report

The report will display all relevant data that you have access to i.e. just the data you own, where you are the Grant Owner, if you are a **Grantee Admin – Single Grants** user, and all data for your Organisation if you are a **Grantee Admin – All Grants** user. If you only need a subset of the returned data, you can filter.

Run the report you need and then click on the filter button on the right side of the screen. This will display the filters you can apply to the report.

Report: Applications/Grants with Organisation
EXT-1 All grants information
Basic information about each grant

Enable Field Editing | Add Column | Filter | Edit

Total Records: 60 | Total Funding Amount: £19,108,944.34 | Total Paid Amount: £500,550.00 | Total Outstanding Payment Amount: £18,608,394.34

	Application/Grant: Grant Name	Application/Grant: Owner Name	Funding Amount	Paid Amount	Outstanding Payment Amount	Grant Start Date	Grant
1	Finance UAT - Case 1E - DIP15E	Kaycee Pickering	£203,751.00	£0.00	£203,751.00	01/05/2026	31
2	Youth Outreach Programme	Andy Matthews	£2,030,659.00	£500,000.00	£1,530,659.00	01/01/2026	31
3	Grant for building project	Kaycee Pickering	-	£0.00	-	-	-
4	Roiler replacement	Kaycee Pickering	-	£0.00	-	-	-
5	Local initiative campaign	Kaycee Pickering	-	£0.00	-	-	-
6	User Group March	Kaycee Pickering	-	£0.00	-	-	-
7	Jenchester SDF Grant for April 2026	Tom Conway	£1,000.00	£550.00	£450.00	01/05/2026	31
8	Development programme	Kaycee Pickering	-	£0.00	-	-	-
9	Jenchester test 2	Kaycee Pickering	-	£0.00	-	-	-
10	Test 3	Kaycee Pickering	-	£0.00	-	-	-
11	Training example	Kaycee Pickering	-	£0.00	-	-	-
12	Training example to demonstrate	Kaycee Pickering	£20,000.00	£0.00	£20,000.00	01/05/2026	31
13	SDF Application April 2026	Kaycee Pickering	-	£0.00	-	-	-
14	SDF Application Jenchester - TEST	Kaycee Pickering	-	£0.00	-	-	-
15	Jenchester example April 2026	Kaycee Pickering	-	£0.00	-	-	-

Filters: Show Me All applications/grants, Date Submitted All Time

In this example, using the 'show me' filter, My applications/grants can be selected.

Grants Portal Handbook

Report: Applications/Grants with Organisation
EXT-1 All grants information
Basic information about each grant

Total Records: 60 Total Funding Amount: £19,108,944.34 Total Paid Amount: £500,550.00 Total Outstanding Payment Amount: £18,608,394.34

Application/Grant: Grant Name	Application/Grant: Owner Name	Funding Amount	Paid Amount	Outstanding
1 Finance UAT - Case 1E - DIP15E	Kaycee Pickering	£203,751.00	£0.00	
2 Youth Outreach Programme	Andy Mathews	£2,030,659.00	£500,000.00	
3 Grant for building project	Kaycee Pickering	-	£0.00	
4 Boiler replacement	Kaycee Pickering	-	£0.00	
5 Local initiative campaign	Kaycee Pickering	-	£0.00	
6 User Group March	Kaycee Pickering	-	£0.00	
7 Jemchester SDF Grant for April 2026	Tom Conway	£1,000.00	£550.00	£450.00 01/05/2026 31
8 Development programme	Kaycee Pickering	-	£0.00	
9 Jemchester test 2	Kaycee Pickering	-	£0.00	
10 Test 3	Kaycee Pickering	-	£0.00	
11 Training example	Kaycee Pickering	-	£0.00	
12 Training example to demonstrate	Kaycee Pickering	£20,000.00	£0.00	£20,000.00 01/05/2026 31
13 SDF Application April 2026	Kaycee Pickering	-	£0.00	
14 SDF Application Jemchester - TEST	Kaycee Pickering	-	£0.00	
15 Jemchester example April 2026	Kaycee Pickering	-	£0.00	

Click **Apply**

This will filter out all applications and grants that are not owned by you.

Report: Applications/Grants with Organisation
EXT-1 All grants information
Basic information about each grant

Total Records: 49 Total Funding Amount: £287,751.00 Total Paid Amount: £0.00 Total Outstanding Payment Amount: £287,751.00

Application/Grant: Grant Name	Application/Grant: Owner Name	Funding Amount	Paid Amount	Outstanding Payment Amount	Grant Start Date	Grant
1 Finance UAT - Case 1E - DIP15E	Kaycee Pickering	£203,751.00	£0.00	£203,751.00	01/05/2026	31
2 Grant for building project	Kaycee Pickering	-	£0.00	-	-	-
3 Boiler replacement	Kaycee Pickering	-	£0.00	-	-	-
4 Local initiative campaign	Kaycee Pickering	-	£0.00	-	-	-
5 User Group March	Kaycee Pickering	-	£0.00	-	-	-
6 Development programme	Kaycee Pickering	-	£0.00	-	-	-
7 Jemchester test 2	Kaycee Pickering	-	£0.00	-	-	-

How to export data from a report

To export the data into Excel from a report, click on the down arrow on the right hand side and select **Export**.

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Report: Applications/Grants with Organisation
EXT-1 All grants information
Basic information about each grant

Enable Field Editing | Add Chart | Edit | Save As | Export

Application/Grant: Grant Name	Application/Grant: Owner Name	Funding Amount	Paid Amount	Outstanding Payment Amount	Grant Start Date	Grant End Date	Application Stage	Gr
1 Finance UAT - Case 1E - DIP15E	Kaycee Pickering	£203,751.00	£0.00	£203,751.00	01/05/2026	31/07/2027	Approved	Gr
2 Youth Outreach Programme	Andy Mathews	£2,030,659.00	£500,000.00	£1,530,659.00	01/01/2026	31/12/2028	Approved	Ac
3 Grant for building project	Kaycee Pickering	-	£0.00	-	-	-	Application In Progress	-

Export

Export View

Formatted Report

Export the report, including the report header, groupings, and filter settings.

Details Only

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format: Excel Format .xlsx

Cancel | Export

Grant Closure

At the end of the implementation of your Grant, the NCI Grants Team will close out the Grant. Before doing so, they will review any outstanding payments and information. If they need any information from you, they will be in touch.

When ready, the Grant Status will be updated to **Closed**, and no further monitoring reports or payments can be actioned from that Grant.

How to request access/remove access to the Grants Portal

To request access or remove access from an existing User, the Primary Contact for your Organisation will need to email the Helpdesk at GrantPortalSupport@churchofengland.org.

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Funding Opportunities naming conventions

The naming convention for Funding Opportunities is derived from 4 elements:

1. Grant Stream Name: Will be a 3-digit code
2. Funding Opportunity Name (*also known as Funding Round Name*): Brief description
3. Target Audience for applications: Who can apply for the grant
4. Time Period: Combination of Month(s), Year

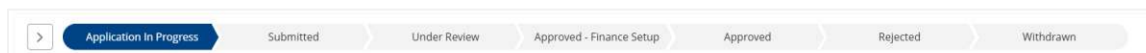
The table below details the abbreviations for each element

Grant Stream	Funding Opportunity	Audience	Time Period
BfM > Building for Mission CSF > Cathedrals Sustainability Fund CRH > Clergy Retirement Housing DIP > Diocesan Investment Programme GST > Giving Advisor Fund GFF > Growing Faith Foundation HPJ > Housing Project MIN > Ministry Experience Scheme NZC > Net Zero Carbon NSC > NS Core Grant PAF > Parish Accessibility Fund PPV > Partnerships RJU > Racial Justice RMF > RMF Innovation TLF > Time Limited Funding	Will be a short description of the Funding Opportunity <i>e.g. Large Grant, Small Grant, Church Demonstrators</i>	All > All grantees can apply DIO > Dioceses DIO & Partners > Dioceses & Partners CATH > Cathedrals External > External only PCC > Parishes TEI > Theological Educational Institute	Month(s)/Year
<p>Example: GST – Small Grant – ALL – April 26</p>			

Application/Grant stages – what do they mean?

In the Grants Portal, you can see the stage your application/grant is at in the lifecycle via the status bar that is visible in the application or grant screen. As stages pass, completed stages will be shown in green and the active stage will be shown in blue.

Application stages



- **Application In Progress:** You have started an application but not yet submitted it. You can continue to edit your application
- **Submitted:** You have submitted your application to the NCI Grant Team for their review/decision. No further edits can be made to the application
- **Under Review:** The NCI Grant Teams are reviewing the application

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- **Approved – Finance Setup:** An Outcome Letter has been issued to you outlining any pre-requirements. Once pre-requirements have been met and confirmed by the NCI Grant Team, the NCI Finance Team will carry out setup activities
- **Approved:** The Grant Agreement has been signed, and the Grant is fully setup in the system. Payments can be requested. Monitoring reports are completed as required. At this stage the bar will change to the one shown below so you may not see this ([Grant stages](#))
- **Rejected:** The application has been rejected by the NCI Grant Team – please note that if the NCI Grant Team need you to update your submitted application, they will reject it, and then reset the status to Application in Progress
- **Withdrawn:** You have withdrawn your application – please note that the NCI Grant Team will need to action this for you, as you are not able to withdraw your own applications

Grant Stages



- **Grant in Preparation:** The NCI Grant Team is completing the setup of the grant. The Grant Agreement is issued for signature
- **Withdrawn:** Your grant has been withdrawn
- **Active:** The Grant Agreement has been signed, and the grant has been fully setup in the system. Payments can be requested. Monitoring reports are completed as required
- **Closed:** The Grant is closed and the implementation is complete.
- **Evaluation:** The Grant is under evaluation

How can I get help and support?

If you have a general query, please contact the NCI Grants team in the first instance. Contact details can be found in the Guidance Notes located in the Funding Opportunity, see [Viewing open Funding Opportunities](#).

For Grants Portal access and system support, please email GrantPortalSupport@churchofengland.org

Grants Portal Handbook

Frequently Asked Questions

What is the Grants Portal?

The Grants Portal is a new system for managing grants across the Church of England. It brings all grant information, activity and reporting into one place, making it easier to manage grants in a clear and consistent way.

Why are we making this change?

Feedback from grant teams and grantees has shown that the current way of working is too manual, complex and inconsistent. We rely heavily on spreadsheets and email, which can lead to delays, errors and additional administration. There is also limited visibility of payments and limited ability to report across the Church. The Grants Portal will make managing grants simpler, clearer and more efficient for everyone.

What are the main benefits?

The Grants Portal will:

- Bring all grant information into one place
- Streamline grant processes
- Provide clear visibility of payments and deadlines
- Simplify reporting
- Improve collaboration between grant teams and grantees
- Strengthen transparency and financial oversight
- Reduce time spent on manual administration
- Support better, more informed decision-making

These benefits apply to both NCI Church teams and grantees.

What's changing, and what's not?

What's not changing:

- The structure of grant teams
- The people involved in grant management
- How decisions about grant awards are made

What is changing?

- A single, consistent process for managing grants across the Church
- All grants managed in one central system
- Improved visibility of payments and reporting
- Standard ways of applying, reviewing, paying and reporting on grants

What will change when I start using the Grant Portal?

The Grants Portal replaces spreadsheets and email with a single, consistent way of working. It gives clearer visibility of payments, deadlines and the progress of your grant, helping you stay up to date and manage your funding more easily.

Who is it for and how do I request access?

If you receive and manage grant funding from the Church of England, you will use the Grants Portal to manage and track your grant. To request access or update your access:

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- Download and complete the [External User Request Form](#)
- Email the completed form to the [Grant Portal Support](#)

Where can I find User Guides, training and resources?

You can access User Guides and training videos in the Resources Hub within the Grants Portal. These provide step-by-step support for common tasks.

Who do I contact if I have questions or need support?

For general queries, please contact your Grants team in the first instance.

For Grants Portal access and system support, email the [Grant Portal Support](#)

Want to find out more about Church of England grants?

If you are a Diocese, Cathedral, Parish, Church or partner organisation, you can explore the range of grants available on the [Church of England website](#).

Grants Portal Handbook

Glossary of Terms

Term	Definition
Contact	A Contact is an individual linked to an organisation or a specific grant in the Grants Portal. Contacts may include Grant Owners, Primary Contacts or other individuals involved in managing or supporting a grant.
Data freeze	The Data Freeze is a short period before go-live when changes to grant data and payments are paused. This allows information to be safely transferred into the new system.
Expression of Interest	<p>Expressions of Interest are used to register your interest in applying for a Grant before completing the full application process. It provides an opportunity for you to present a high-level outline that can be reviewed and discussed with the NCI Grant Team before committing to the full application process.</p> <p>Once an Expression of Interest is submitted, an email notification will automatically be sent to the organisation's Primary Contact, so they are aware of interest in a particular Funding Round and to ensure there is internal support before a full application is completed.</p>
Funding Opportunity / Funding Round	A Funding Opportunity is a specific grant programme or funding round that organisations can apply to. It includes details such as eligibility, application requirements, deadlines and funding criteria. It may also be referred to as a Funding Round.
Grant Owner	A Grant Owner is the named individual responsible for managing and updating a specific grant in the Grants Portal. For new grants, the Grant Owner will automatically be the person who submits the application. For existing grants, we will work with you to confirm who the Grant Owner should be for each active grant. Please note: the Grant Owner is the only person who can submit Payment Requests and Monitoring Reports
Grant change request	A Grant Change Request is used to request updates to an existing grant, such as changes to timelines, budget or scope. These requests are reviewed by the NCI Grant Team.
Monitoring Report	A Monitoring Report is a formal update submitted by a grantee to provide information on the progress of a funded project. This may include financial updates, delivery milestones, outcomes achieved and any challenges or changes.
Narrative form	A Narrative form is a structured form used to capture descriptive information about a grant, such as project progress, outcomes, impact or changes.
NCI	National Church Institutions – these are the main functions within the central Church of England team, such as Archbishop's Council and Church Commissioners. The teams awarding grants work within these functions.

Grants Portal Handbook

Term	Definition
Organisation	An Organisation is the body receiving or applying for grant funding (for example, a Diocese, Cathedral, Parish or partner organisation). All grants, users and activities in the Portal are linked to an organisation.
Primary Contact	A Primary Contact is the main named individual for a grantee organisation. They receive key communications and notifications about grant activity (such as Expressions of Interest or applications submitted) and help ensure appropriate oversight within the organisation.
Resources Hub	The Resources Hub is an area within the Grants Portal where users can access guidance, user guides, training materials and FAQs.
Role - Grantee Admin - Single Grants	An individual who is identified as the owner of a grant record who is responsible for managing their own grant(s) for their organisation. They can only see their own application and grant records.
Role - Grantee Admin - All Grants	An individual who is authorised to see and update all applications and grant records for their organisation. They can see all applications and grants records for their organisation. Please note: only the Grant Owner can submit payment requests and monitoring reports
Role - View Only - All Grants	An individual who is authorised to see all applications and grants for their organisation and run reports, although they cannot update data.