

Strategic Investment Organisation Portfolio: Expression of Interest Application Guidance

Five-year investment 2028 to 2033

EOI Stage 1 for organisations applying to both Bradford Council's Strategic Investment Organisation programme and Arts Council England's National Portfolio Organisation programme.

This guidance explains who can apply, what the investment can support, how to complete the application and budget information, and how Bradford Council proposes to assess applications.

Read this guidance first

- Read the whole guidance before starting the application.
- Use the application form and budget template provided.
- Answer the question asked and use evidence that is proportionate to your organisation and request.
- Word limits are maximums, not targets.
- Keep the figures in the application, budget and supporting documents consistent.
- Contact Bradford Council before the deadline if you need an accessible format or reasonable adjustment.

About the Strategic Investment Organisation Portfolio

Bradford Council's Strategic Investment Organisation Portfolio provides organisational investment to eligible cultural organisations whose work creates public benefit for Bradford District. It supports the capacity and infrastructure that allow organisations to deliver sustained cultural activity. It is not a project grant.

The relevant investment period is **1 April 2028 to 31 March 2033**. Continued investment is subject to the Council's annual budget, satisfactory performance, compliance with any investment agreement and there being no material adverse change in the organisation.

This is an open and competitive opportunity. Existing Council investment does not automatically transfer into the new portfolio. Demand may exceed the funding available, so meeting the eligibility requirements does not guarantee an award.

What organisational investment can support

- Core organisational costs, including staffing, premises and overheads.
- Ongoing cultural and creative programmes and services.
- Artist, practitioner, production and technical costs.
- Participation, community engagement, audience development and targeted outreach.
- Organisational and workforce development.
- Sector development, collaboration and partnership activity.
- A fair share of overheads through full cost recovery.

What it is not designed to support

- Standalone projects or one-off events without a wider organisational purpose or sustained benefit.
- Capital works.
- Activity without a clear cultural or creative purpose.

- Party-political activity or activity whose primary purpose is religious instruction or worship.
- Activity primarily intended to generate private profit.
- Activity that does not primarily benefit Bradford District and its communities.

1. Who can apply

Applicants must meet all of the following requirements:

- Be formally constituted and operate on a not-for-profit basis.
- Have arts, culture, heritage or creativity at the core of the organisation's purpose and activity.
- Be based in Bradford District or have relocated and be operating from Bradford before 1 April 2028.
- Have operated for at least 12 months by the application deadline.
- Have an appropriate board or governing body and meet relevant legal and statutory requirements.
- Demonstrate financial viability, organisational resilience and a credible plan.
- Have a track record of cultural delivery and public benefit.
- Demonstrate an appropriate mix of income and a realistic approach to fundraising.

Who cannot apply:

- Individuals, sole traders or informally constituted groups.
- Commercial or for-profit organisations.
- Public-sector bodies or formal education establishments.
- Organisations without arts, culture, heritage or creativity at the core of their purpose and activity.
- Organisations that cannot demonstrate suitable governance, financial management or statutory compliance.

Bradford Council may check information held by Companies House, the Charity Commission, other regulators and public funders, and may request clarification or evidence.

2. Purpose of the EOI route

This route is designed specifically for organisations applying to Arts Council England's 2028–2033 National Portfolio and seeking an early indicative decision in principle from Bradford Council as part of its Strategic Investment Organisation programme 2028-2033. It allows the Council to assess the essential proposition before the applicant completes the full Bradford application.

An indicative decision is not an award. Any amount identified at the EOI Stage 1 is conditional and non-binding. It may be used only in line with Arts Council England's published guidance and must not be described as confirmed or secured funding.

3. Investment range

Organisations may apply for between £5,000 and £50,000 per year through the 2028–2033 Strategic Investment Organisation Portfolio programme.

Awards towards the upper end of this range, particularly requests for £50,000 per year, will be exceptional. The amount requested can be varied between years where there is a clear and evidenced reason.

CASH MATCH FUNDING

The cash-match requirement is calculated against the total Bradford Council SIO investment requested across the full five-year period, from 2028/29 to 2032/33. It is not calculated separately for each year.

Add together the Bradford Council SIO investment requested for all five years and apply the relevant cash-match rate shown in the table. You must then demonstrate eligible cash income from other sources equal to at least that percentage of your total five-year request.

For example, a total five-year request of £100,000 falls within the 20% match band and therefore requires at least £20,000 in eligible cash income from other sources across the five-year period.

In-kind support, donated goods or services, free use of facilities and volunteer time do not count towards the cash-match requirement.

Total five-year SIO request	Cash match rate
£25,000 to £75,000	10%
£75,001 to £150,000	20%
£150,001 to £250,000	25%

4. Application timetable

Stage	Date
EOI Stage 1 opens	1 October 2026
EOI Stage 1 closes	23 October 2026
EOI Stage 1 assessment	26 October to 8 November 2026
EOI Stage 1 outcome + decision communicated	W/C 9 November 2026
Stage 2 applications open	11 January 2027
Stage 2 applications close	12 March 2027
Stage 2 assessment	15 March to 28 May 2027
Final decision + decision communicated	W/C 7 June 2027
Investment begins	1 April 2028

Bradford Council reserves the right to change the timetable where necessary. Any change will be communicated to applicants.

5. Guidance on completing the application form

The guidance below follows the order of the application form. Assessors will read the application as a whole, so use cross-references where appropriate and avoid repeating the same information in several answers.

1: ORGANISATION AND APPLICATION DETAILS

Give enough information to establish identity, legal status, partnership arrangements and current regular funding.

Include:

- Confirm that the organisation is not-for-profit.

- If applying as a lead organisation, identify formal partners, roles and accountable-body arrangements.
- State current Bradford, ACE NPO and other regular core funding accurately.

Avoid:

- Providing extensive partnership background where no formal partnership application exists.

2: ABOUT YOUR ORGANISATION

Help an assessor who may know nothing about the organisation understand its purpose and ability to deliver.

Include:

- Describe the work, audiences and communities central to the organisation.
- Use a small number of relevant achievements and evidence from the last three years.
- Select one primary cultural discipline.

Avoid:

- A chronological history or unsupported claims of quality and impact.

3: FIVE-YEAR PROPOSITION

Set out the intended change, programme and cultural approach at headline level.

Include:

- Explain what the organisation wants to achieve by March 2033 and why it matters now.
- Summarise the main work and who will shape or deliver it.
- Describe how creativity, quality, relevance and ambition will be developed and assessed.

Avoid:

- The full operational detail expected at Stage 2.

4: PUBLIC BENEFIT REACH AND ENGAGEMENT

Show who will benefit, why the work is needed and where it will reach.

Include:

- Use evidence or insight about need or opportunity.
- Distinguish existing audiences and communities from those the organisation intends to reach more meaningfully.
- Explain practical action on inclusion and engagement.
- Explain district-wide, digital, touring or outside-Bradford activity where relevant.

Avoid:

- Listing communities without explaining the relationship or benefit.

5: GEOGRAPHIC REACH

Tell us which Bradford District wards you expect the proposed work to reach.

Include:

- Complete the ward list and explain district-wide, digital, touring or activity outside Bradford.

Avoid:

- Selecting wards without a reasonable basis in the proposed programme or engagement plans.

6: STRATEGIC CONTRIBUTION

Identify the organisation's strongest contribution to Culture is Our Plan.

Include:

- Select up to two ambitions and two targets only.
- Link selections to specific activity, benefit and evidence.

- Explain the organisation's realistic contribution rather than claiming responsibility for a district-wide target.

Avoid:

- Selecting broad themes that are not central to the proposal.

7: INVESTMENT REQUEST AND ADDITIONALITY

State the proposed ACE and Bradford requests and explain why Council investment matters.

Include:

- Keep annual figures consistent with the organisation's current ACE planning.
- Explain changes between years.
- Describe what Council investment enables and what changes under lower or no awards from either funder.

Avoid:

- Describing Council support as confirmed.

8: HEADLINE FINANCIAL INFORMATION

Provide a credible five-year resource picture and enough current financial evidence to assess risk and need.

Include:

- Make income, expenditure and surplus or deficit totals internally consistent.
- Explain fundraising assumptions, reserve use, borrowing, cash pressure and current resilience.
- Reconcile recent performance figures to accounts or management information.

Avoid:

- Submitting a full five-year budget at Stage 1 unless requested.
- Treating reserves as income.

Financial information at Stage 1

The EOI asks for headline five-year figures and recent financial information. A separate five-year Expenditure and Income workbook is not required at Stage 1. Organisations invited to Stage 2 will complete the full budget template and provide more detailed financial and supporting information.

9: DELIVERY OUTCOMES AND RISK

Identify priority changes and the main risks to achieving them.

Include:

- Give up to five outcomes with a baseline or starting point and a way to measure progress.
- Focus on material strategic risks and current controls.
- Disclose significant issues at a high level and indicate if a secure discussion is needed.

Avoid:

- Routine operational risks that do not affect the proposition.

10: RESPONSIBILITY AND COMPLIANCE

Confirm the organisation's core governance and compliance position.

Include:

- Answer every statement.
- Explain gaps honestly, with interim controls and a target date.
- Provide the required evidence using clear file names.

Avoid:

- Selecting Yes for arrangements that are only planned.

11: SUPPORTING DOCUMENTS

Submit the documents listed in the application form. Use clear file names beginning with the organisation's name, followed by a short description, for example

OrganisationName_AnnualAccounts2026. Label draft, provisional or forecast information clearly.

Document	Requirement
Governing document	Required
Current board or trustee list including roles	Required
Organisation chart	Required
Latest approved or filed annual accounts	Required
Latest management accounts including profit and loss and balance sheet	Required
Reserves policy	Required
Partnership or accountable-body arrangement	Where relevant
Other evidence directly relevant to assessment	Optional

Use the explanation box in the application form for any missing or draft document. Do not attach large amounts of general promotional material. Other evidence should be concise and directly relevant to assessment.

12: USE OF INFORMATION

Read this section carefully. It explains how Bradford Council may use, share and publish information provided in the application, and how information may be handled under data protection and freedom of information law.

13: DECLARATION

The declaration must be completed by an authorised signatory. Check that the application and supporting information are accurate and complete, that the governing body has approved or authorised the submission, and that all material matters relevant to the assessment have been disclosed before signing.

6. How applications will be assessed

Stage 1 applications will be assessed by Bradford Council officers against the published assessment areas. The Council may also appoint suitably experienced external assessors or advisers where their expertise would support the assessment process.

Everyone involved in assessing or advising on applications must declare any actual, potential or perceived conflict of interest. They must not have a material connection to an applicant that could affect, or reasonably be seen to affect, their impartiality. Bradford Council will record and manage any declared conflict, which may include removing the individual from the assessment or decision-making process for that application.

The weightings below reflect the purpose of the EOI stage: to assess the strength and potential of the proposed five-year programme, its intended benefit and reach, the organisation's ability to deliver it, and the need for Bradford Council investment.

Assessment area	Weight	What assessors will consider
Strategic contribution	15%	Contribution to Culture is Our Plan and Bradford's ambitions.
Public benefit	15%	The cultural, social or economic benefit expected for Bradford District.
Creativity quality and ambition	15%	The quality, relevance and ambition of the proposed work.
Reach and engagement	15%	Who will benefit, geographic reach, accessibility and meaningful engagement.
Organisational strength	20%	Current financial resilience, governance, leadership, capacity, compliance and risk management.
Impact and value	10%	Credible targets and outcomes and proportionate value from public investment.
Need and additionality	10%	Why Council investment is needed and what would change at different award levels.

SCORING SCALE

Assessors will award a score from 0 to 5 for each area, then apply the published weighting. They will assess the evidence in the application, budget and supporting documents together.

Score	Descriptor	Meaning
0	No relevant evidence	The response does not address the criterion or provides no assessable evidence.
1	Weak	The evidence is very limited, unclear or contains major weaknesses.
2	Partly meets	Some relevant evidence is provided, but important gaps or concerns remain.
3	Meets	The response addresses the criterion clearly and provides credible evidence.
4	Strong	The response is convincing, well evidenced and has only minor limitations.
5	Excellent	The response is exceptionally clear, compelling and well evidenced, with no material weakness.

MODERATION AND PORTFOLIO DECISIONS

Applications will be reviewed and moderated so that the criteria are applied consistently. Bradford Council may seek clarification, verify information and carry out financial, governance and compliance checks.

Final decisions will consider the assessed strength of each application, available funding and the need for a balanced portfolio. Portfolio considerations may include cultural disciplines, geographic reach, communities served, organisational scale, distinctive contribution and the overall mix of investment. A strong score does not guarantee an award or the amount requested.

Material concerns. Bradford Council may decide not to progress or fund an application where eligibility is not met, required information is missing, financial viability is not credible, a material safeguarding or compliance concern is unresolved, or the Council cannot reasonably manage the risk.

7. Submitting the application

- Complete every relevant field and check the application against this guidance.
- Save the completed application form as a final PDF and keep the editable version.
- Submit the PDF and all required supporting documents to sio@bradford.gov.uk by the deadline: **Friday 23 October 2026, 5pm**. Include your organisation's name and the investment year in the email subject line, for example: '**Arts Org Name: 2028-2033 EOI Application**'
- Late applications will not be assessed unless Bradford Council has explicitly confirmed otherwise in advance.
- Keep the submission confirmation and a complete copy of everything provided.

8. What happens after Stage 1

Bradford Council will notify applicants of the EOI outcome. An organisation may be invited to Stage 2 and given an indicative, conditional and non-binding level of Council support for planning its Arts Council England National Portfolio Organisation application. This is not a grant offer and must not be described as confirmed or secured funding.

An invitation to Stage 2 does not guarantee an award. Applicants will need to complete the full application and five-year budget and pass further assessment and due diligence. Any future investment remains subject to available Council funding, formal approval, satisfactory information and there being no material change to the proposal or organisation.

9. Help and support

We want to support organisations to understand the application process and submit a complete application. We can:

- clarify the guidance, application questions and assessment process;
- explain how to complete the application form and budget template;
- help with technical problems relating to the documents; and
- provide reasonable adjustments or information in alternative formats.

We cannot write or edit your application, tell you what to include in your answers, or guarantee that your application will be successful.

If you need help or a reasonable adjustment, please contact us at sio@bradford.gov.uk as early as possible and before the application deadline.