Application help notes: Heritage Innovation Fund

05/07/2022

See all updates

Page updates

Page created on 5 July 2022

Page last updated on 25 July 2022. See all updates.

Using these help notes

We are accepting applications for grants up to **£25,000**.

The Heritage Fund uses the same forms across all of our funding programmes. Some questions will need to be answered differently for the Heritage Innovation Fund – please use these notes to help you apply.

Do not use the help icons on the form because they relate to our other funding programmes.

The term "project"

The term "project" is used on many of our existing forms. However, the Heritage Innovation Fund is targeted at supporting organisations to explore a problem area, which might include project-based working. Regarding this particular funding, the word "project" refers to the time when you are exploring your problem or challenge area.

Extra support

We will be holding webinars and workshops to help you apply. Find out more about these events.

Register

If you do not already have a user account, you will need to register on our Get funding for a heritage project service.

If you are unable to set up your account or have any other technical problems, email: investment-service-support@heritagefund.org.uk.

How to start a new application form

1. Click Start a New Application and select Grants of £10,000 to £250,000.
2. Click Start a New Application. Please note that you must not apply for more than **£25,000**.

If you copy and paste text directly into your application, make sure you do not exceed the stated word count limit.

Don't forget to save the progress of your application as you work on it.

About your project

Tell us of any advice you have received in planning your project and who from.

Have you received any support or advice from our engagement team or The Young Foundation? Did you join a pre-application webinar or workshop?

Is this your organisation’s first application to us?

Answer yes or no.

If no, provide details of your last application to us.

Project title

Please ensure that you use the following format for your project title: "Explore: your organisation’s name".

This is so we know that you are applying for the Heritage Innovation Fund. Otherwise, your application may be delayed or considered under the wrong programme.?

When will your project happen?

Enter a project start date of February 2023 and a project end date of July 2023.

This is because all of the Heritage Innovation Fund projects start at the same time in order to join the cohort support programme.

Why does your project need to happen now?

Tell us about the most pressing workforce-related challenge you want to tackle with this funding, including:

- how the challenge will impact your organisation in the short, medium and long term
- who it affects/will affect
- how it will affect your organisation in the future if no action is taken

Is the project taking place at the same location as your organisation’s address?

Answer yes or no.

If no, click Find your address.

Describe your idea

In **no more than 500 words**, please provide a summary of what you would focus on and how you would benefit from the funding and support available. Include:

- An explanation of the workforce challenge you want to focus on. You might want to tell us some of the questions you will be aiming to answer.

- Why this is important. How do you know this is a problem and what steps have you taken to meet this challenge already?

- how addressing this challenge could be useful beyond your organisation

- what having the time and support to explore it and to scope potential solutions means for your organisation's prospects into the future

If necessary, use bullet points.

Please note: the summary you provide is the **only part of your application form which is seen by decision takers**. This is presented alongside our Investment Managers' assessment of your application.

Will capital work be part of your project?

Answer no. Capital works are not eligible under the Heritage Innovation Fund.

If you are undertaking any capital work (including repair, refurbishment etc) to land, buildings or heritage items, tell us who owns it.

Leave blank.

Does your project involve the acquisition of a building, land or heritage items?

Answer no. Acquisition of buildings, land or heritage items is not eligible under the Heritage Innovation Fund.

Do you need permission from anyone else to do your project?

Answer yes, no, not sure.

Explain here if you have sign off from your line manager/senior management/board to work on this project over the next six months.

What difference will your project make?

Please tell us:

- how you would use the space and time for discovery outside your main work

- how this would allow you to address the challenge differently
- Why your organisation is interested in joining an innovation cohort. What might you find most challenging or rewarding about working in a cohort setting?
- how doing this work will unlock future potential for your organisation/community

Is the heritage considered to be at risk?

Answer yes or no.

If yes, explain how your organisation's sustainability and services might be impacted if this challenge goes unmet.

Does the heritage have any formal designations?

Please select any options that apply.

Does your project involve heritage that attracts visitors?

Answer yes or no.

If yes, provide figures.

Why is your project important to your community?

Tell us about the importance of addressing this challenge: to your organisation, community and the wider sector.

- tell us why your community considers this project important
- To what extent is your challenge shared by other heritage organisations and practitioners?
- Who within your current networks has engaged with this challenge so far, and how?
- Who outside your current networks would you most like to engage and connect with on this issue?

What measures will you take to increase positive environmental impacts and decrease negative environmental impacts?

We expect the highest standards of environmental sustainability to be delivered by **all** the projects we fund.?Find out more about our environmental sustainability requirement.

What will happen after the project ends?

Tell us about how you plan to implement the insights from this project after the funding period and support programme ends.

Why is your organisation best placed to deliver this project?

Tell us how the executive and/or trustees in your organisation view your application to the Heritage Innovation Fund.

What awareness do they have of your challenge and how will they be involved??

Will your project be delivered by a partnership?

If yes:

Who are your partners?

Please provide a named contact from each organisation. Please note if you are planning on working with another organisation to carry out your project, we would like to see your partnership agreement.

This document should outline both partner's roles and responsibilities and should be signed by all parties. This agreement should reflect the needs of your project and you may need to seek independent advice.

You do not need to provide a partnership agreement unless another organisation is delivering a significant part of your project. [500 words]

If you have one, upload a partnership agreement.

Outcomes

We describe the difference we want to make with our funding through a set of nine outcomes. Outcomes are changes, impacts or benefits that happen as a direct result of our funding.

The mandatory outcomes for the Heritage Innovation Fund are:

- a wider range of people will be involved in heritage
- the funded organisation will be more resilient
- people will have developed skills

Using the prompts below, please tell us how the grant funding, participating in the structured innovation support programme and working as part of a cohort will address **all three outcomes**.

As these are small grants, you do not need to address **every** bullet point below.

A wider range of people will be involved in heritage

- How will investigating this challenge allow you to involve a wider range of people in accessing heritage?
- Who outside of your current networks would you most like to engage and connect with on this issue?

- How will you engage staff and volunteers within your organisation with this challenge?

The funded organisation will be more resilient

- How will doing this work make your organisation and staff team stronger and more resilient?
- How will you implement any actions identified during the project?

People will have developed skills

- What skills will your nominated staff member develop as a result of the project?
- Do you expect other staff members, volunteers or participants to gain skills as a result of this work?

Will your project achieve any of our other outcomes?

Answer no. You do not need to tell us about the other outcomes.

Project management

- How will your project be managed?
- Who will be leading this project within your organisation and why?
- What steps will your organisation take to enable the project lead to have the time to participate?
- Tell us about any contingency plans, or where you can introduce some flexibility, in case changes are required?
- How will the project lead's normal workload be covered? Remember: the grant funding can be used in part to backfill.

How will you evaluate your project?

The focus of the Heritage Innovation Fund is on enabling organisations to learn and develop while exploring a pressing challenge they are facing.

Engagement with the grantee support partner (funded and appointed by the Heritage Fund) will be a key measure of progress. As part of this, organisations will reflect on their own learning at key moments.

Please provide an outline here about:

- what your organisation hopes to gain by participating in this programme
- what your hopes and fears are for joining a cohort
- what would make you satisfied at the end of the six months

How do you plan to acknowledge your grant?

Please provide details of how you will acknowledge this grant. Find out more about grant acknowledgement.

Tell us about any jobs or apprenticeships that you will create to deliver your project

If you are backfilling or extending the hours of a post to cover the nominated staff member, please tell us how this will be managed.

Project costs

Project costs help us understand how you plan to put your project into action.

The grant funding covers the costs of staff time to participate in this programme and deliver the project over the six-month period. This includes:

- salary costs/backfill costs including on costs of the key staff member leading the work
- associated costs of attending any in-person components of the programme
- associated costs of delivering activities as part of the project (such as stakeholder consultation events or activities)
- up to 10% of the grant may be used to cover the costs of essential hardware needed to work on the project

Completing the project costs table

Add a new cost for each project cost. For example, if you are doing three activities, add three separate activity cost types, each with their own description and amount.

Cost type: select from the list.

The following cost types may help you:

- new staff costs
- professional fees
- recruitment
- equipment and materials, including learning materials
- training for staff and training for volunteers
- travel for staff and travel for volunteers
- expenses for staff and volunteers
- other: please use for any costs that do not fit with any of the other cost headings
- publicity and promotion

- contingency: we would encourage you to build in contingency to pay for unexpected costs required to deliver your project. The total contingency figure may be up to 10% of the total costs of the project. Make sure that you only include your required contingency here and not within the other cost headings in the application.
- description: describe what this cost line will go towards
- amount: this can be an estimate
- VAT (Value Added Tax) amount: include non-recoverable VAT in this column. You may not pay VAT on certain types of work or may only pay it at a lower rate. You should approach HM Revenue & Customs to check how much VAT you will need to pay.
- Full Cost Recovery

Support for your project

Select no. Partnership funding is not required for the Heritage Innovation Fund.

Add a non-cash contribution

We ask that you commit a small proportion of a senior leader's time as a project sponsor. Please describe that arrangement here.

Volunteers

Leave blank. Volunteer contributions are not required for the Heritage Innovation Fund. However if there are specific details relating to volunteer involvement in this project, tell us here.

Evidence of support

Optional letter of support from the senior leader who is acting as sponsor for this project.

Supporting documents

The following supporting documents must be uploaded with your application form. File sizes should be smaller than 20MB.

1. Upload your organisation's governing document

Before we assess your application, we need to see a copy of your organisation's governing document.

This is an official document that sets out your organisation's purposes and rules of operation. It formalises governance and explains how and by who decisions are made. It is sometimes called a constitution, rule book, terms of reference, memorandum and articles of association, or declaration of trust.

The Charity Commission provides guidance on creating a governing document.

If you do not have a signed copy, you can submit other evidence to show that the governing document has been adopted, for example, minutes of a committee meeting.

Your governing document should include the following:

- the name and aims of your organisation
- a statement that prevents your organisation from distributing income or property to its members during its lifetime
- a statement which confirms that, if your organisation is wound up or dissolves, the organisation’s assets will be distributed to another charitable or not-for-profit organisation and not to the organisation’s members
- the date when it was adopted and the signature of your chairperson (or other authorised person)

We are unable to accept your application if your governing document does not include the above.

Please make sure your application falls within the aims of your organisation.

You do not need to upload your governing document if you are:

- a public organisation, for example, a local authority
- a charity registered with the Charity Commissions for England, Scotland or Northern Ireland
- one of the following church organisations:
    - Baptist Church
    - Church in Wales
    - Church of England
    - Church of Scotland
    - Methodist Church
    - Roman Catholic Church
    - Scottish Episcopal Church
    - United Reformed Church

2. Upload your organisation’s accounts

Before we assess your application, we need to see your organisation's most recent accounts.

Make sure your accounts are recently audited or verified by a date and signature from your chief financial officer or equivalent.

You do not need to upload your accounts if you are:

- A public organisation. For example, a local authority.

- If you are a new organisation and do not have audited accounts, you can submit your last three bank statements, or a letter from your bank confirming that you have opened an account.

3. CV of the nominated staff member

Please provide a recent CV of the individual who will be leading the project, or a statement of why they have been chosen to lead the work.

There is no designated section in the application form for this document, so please upload it under "Briefs for internally or externally commissioned work".

Supporting documents we DON'T require

The application form also requests the following supporting documents, which you **do not need to supply** for this application:

- project plan

- briefs for internally or externally commissioned work (use this space to upload the CV or personal statement)

- project images

- calculation of full cost recovery

If the form will not let you proceed without uploading something, you can submit one of the documents above again.

Page updates

- **25 July 2022:**
  - Full Cost Recovery has been added to the ‘Completing the project costs table’ section for clarity.
  - How we advise you to respond to the 'Will your project be delivered by a partnership?' question has changed to reflect that we will be accepting applications from partnerships.
