Application form questions and help notes – £10,000 to £250,000

See all updates

Questions from our our National Lottery Grants for Heritage – £10,000 to £250,000 application form.

Page created: 23 March 2023.

Use this page to see what questions appear on the application form before you start your application.

It also includes **help notes** that appear on the form.

You might find it helpful to refer to our application guidance when answering the questions.

You can submit a Project Enquiry Form to get feedback and advice from us before you start work on a full application to this programme.

About your organisation

Tell us about your organisation's main purpose and activities

[Text field – 500 words]

How many board members or trustees does your organisation have?

[Enter figure]

Are you VAT registered?

- No, I am not VAT registered
- Yes, I am VAT registered

If yes: [Enter VAT number]

Does your organisation use social media?

If so, please provide us with some information (for instance, your organisation's Twitter handle).

[Text field – 500 words]

How much did your organisation spend in the last financial year?

[Enter figure]

What level of unrestricted funds is there in your organisation’s reserves?

[Enter figure]

About your project

Tell us what advice you have received in planning your project and who from

[Text field – 500 words]

Is this your organisation’s first application to us?

- Yes, this is my organisation’s first application????? [Tick box]
- No, this is not my organisation’s first application [Tick box]

If no:

- Most recent project title [Text field – 255 characters]
- Most recent project reference number. Your most recent project reference number should be in the format HG-12-12345 [Enter project reference]

Project title

Give your project a title or name that we can refer to it by.

When will your project happen?

- Project start date [Enter date]
- Project end date [Enter date]

Why does your project need to happen now?

[Text field – 500 words]

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

- Yes, the project is taking place at the same location as my organisation’s address [Tick box]
- No, the project is not taking place at the same location as my address [Tick box]

If no

Find your address: enter postcode > select an address > edit selected address details.

Describe your idea

This helps us to understand what your project is all about. Explain the ambitions of your project, how it relates to heritage and what you will spend the money on.

[Text field – 500 words]

Will capital work be part of your project?

By capital work we mean repair, conservation, new build, digitisation, or work to stabilise the condition of objects.

Examples of capital work:

- conservation of a heathland
- repairs to a war memorial
- digitisation of a photographic archive

For projects involving physical works, for example conservation to a historic building or new building work, please read the ownership requirements section of either the £10,000 to £100,000 grant programme guidance or the £100,000 to £250,000 grant programme guidance.

You may also wish to look at the full receiving a grant guidance for projects of £10,000 to £100,000 or receiving a grant guidance for projects of £10,000 to £250,000.

- No, capital work is not part of my project [Tick box]
- Yes, capital work is part of my project [Tick box]

If yes

If your project involves capital work, please send us a condition survey, or another appropriate document, such as a draft or outline conservation plan.

A condition survey explains the condition of a building and work that will need to be done to it. It is usually done by a chartered surveyor.

[Upload a file]

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

Please select the option that applies.

- Your organisation
- Project Partner
- Neither
- N/A

If 'Your organisation' is selected, tell us:

- If your organisation has the freehold of the building or land, or own outright the heritage items;

- If your organisation has the lease of the building or land and how many years are left to run on the lease;
- If your organisation has, or are you planning to take out, a mortgage or other loans secured on the building or land, or heritage item;
- If so, give us details of the lender and the amount of the mortgage or loan.

[Text field – 500 words]

If you have one, upload an ownership document. [Upload a file]

If ‘Project partner’ is selected, tell us:

- The name of the partner organisation;
- If the project partner has the freehold of the building or land, or own outright the heritage items;
- If the project partner has the lease of the building or land and how many years are left to run on the lease;
- If the project partner has, or are you planning to take out, a mortgage or other loans secured on the building or land, or heritage item;
- If so, give us details of the lender and the amount of the mortgage or loan.

[Text field – 500 words]

If ‘Neither’ is selected:

If you do not currently meet our ownership requirements, tell us the date when you expect to do so.

[Text field – 500 words]

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

- No, my project does not involve the acquisition of a building, land, or heritage items [Tick box]
- Yes, my project involves the acquisition of a building, land, or heritage items [Tick box]

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

Examples of what might need permission:

- Agreement from the owner of a heritage asset
- Access rights from a landowner
- Planning permission from the council
- Consent to record audio or take photographs of individuals

If you don’t know if you need permission, choose the ‘Not sure’ option and provide details.

Select one option:

- No, I do not need permission
- Yes, I do need permission
- Not sure if I need permission

If yes

Please provide more information about who you need permission from to do your project.

[Text field – 300 words]

If not sure

Please provide more information about who you might need permission from to do your project.

[Text field – 300 words]

What difference will your project make?

Tell us what impact your project will have on heritage, people, your community, and the environment. Explain how you will build environmental sustainability into your project.

[Text field – 500 words]

Is the heritage considered to be at risk?

- No, the heritage is not considered to be at risk [Tick box]
- Yes, the heritage is considered to be at risk [Tick box]

If yes

Explain why you consider the heritage to be at risk and how.

[Text field – 500 words]

Does the heritage have any formal designations?

Select all that apply

- Accredited Museum, Gallery or Archive
- Designated or Significant (Scotland) Collection
- DMCS funded Museum, Gallery or Archive
- World Heritage Site
- Grade I or Grade A listed building
    - How many buildings of this type are included in your project?
- Grade II* or Grade B listed building
    - How many buildings of this type are included in your project?
- Grade II, Grade C or Grade C(S) listed building
    - How many buildings of this type are included in your project?
- Local list
    - How many buildings of this type are included in your project?
- Scheduled Ancient Monument

    - How many monuments of this type are included in your project?
- Registered historic ship
    - What is the certificate number? [Text field – 255 words]
- Conservation Area
- Registered Battlefield
- Area of Outstanding Natural Beauty (AONB) or National Scenic Area (NSA)
- National Park
- National Nature Reserve
- Ramsar site
- Regionally Important Geological and Geomorphological Site (RIGS)
- Special Area of Conservation (SAC) or e-SAC
- Special Protection Areas (SPA)
- Grade I listed Park or Garden
    - If applicable, what is the registration or inventory number(s)? [Text field – 255 words]
- Grade II* listed Park or Garden
    - If applicable, what is the registration or inventory number(s)? [Text field – 255 words]
- Grade II listed Park or Garden
    - If applicable, what is the registration or inventory number(s)? [Text field – 255 words]
- Protected Wreck Site
- National Historic Organ Register
- Site of Special Scientific Interest
- Local Nature Reserve
- Other
    - Please specify [Text field – 255 words]

Does your project involve heritage that attracts visitors?

- No, my project does not involve heritage that attracts visitors [Tick box]
- Yes, my project involves heritage that attracts visitors [Tick box]

If yes

- How many visitors did you receive in the last financial year? [Enter figure]
- How many visitors a year do you expect on completion of your project? [Enter figure]

Why is your project important to your community?

Explain why your community is interested in the project and why they care about it.

Tell us if the heritage of the project is included in a formal document, for example, in a local development plan.

[Text field – 500 words]

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

[Text field – 500 words]

What will happen after the project ends?

Tell us how the things you produce will be made available to the public, how the outcomes will be maintained, and how you will manage the heritage in the future.

We use this information to assess the value for money of our investment in your project.

[Text field – 500 words]

Why is your organisation best placed to deliver this project?

Tell us why specifically your organisation should run this project. Demonstrate that you have made contact with relevant projects and organisations in your area.

[Text field – 500 words]

Will your project be delivered by a partnership?

- No, the project will not be delivered by a partnership [Tick box]
- Yes, the project will be delivered by a partnership [Tick box]

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.

[Text field – 500 words]

If you have one, upload a partnership agreement. [Upload file]

How will your project involve a wider range of people?

This is a mandatory outcome for all projects funded by the National Lottery Heritage Fund.

Your answer should explain how your audience or volunteer profile will have changed between the start - and end - of the project.

It might include, for example, a broader range of ages, ethnicities and social backgrounds, more disabled people, or groups who have never engaged with your heritage before.

Your answer should tell us how you will reach new groups of people through your project. Include evidence to support your plans.

[Text field – 300 words]

Will your project achieve any of our other outcomes?

Check the outcomes you will achieve and describe how you will achieve them:

- Heritage will be in a better condition
- Heritage will be identified and better explained
- People will have developed skills
- People will have learned about heritage, leading to change in ideas and actions
- People will have greater wellbeing
- The funded organisation will be more resilient
- The local area will be a better place to live, work or visit
- The local economy will be boosted

[Text fields – 300 words for each outcome selected]

How will your project be managed?

Tell us who will make decisions, the experience of the people involved and their roles in the project. We know all projects have risks. We want to know what risks have been considered and how they will be managed.

[Text field – 500 words]

If you already have a risk register, you can upload that here instead. [Upload file]

How will you evaluate your project?

[Text field – 500 words]

How do you plan to acknowledge your grant?

In your answer, tell us how you plan to provide special access or offers to National Lottery players

[Text field – 500 words]

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

If you plan to recruit a new member of staff to help deliver your project, including an apprentice, please submit a job description for that post. Please note: You must openly advertise all new staff posts, unless you are extending the hours of an existing member of staff or are moving an existing member of staff into the project post.

[Text field – 500 words]

Upload any job descriptions. [Upload files]

How much will your project cost?

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

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 list]

- New staff
- Professional fees
- Recruitment
- Purchase price of heritage items
- Repair and conservation work
- Event costs
- Digital outputs
- Equipment and materials, including learning materials
- Training for staff
- Training for volunteers
- Travel for staff
- Travel for volunteers
- Expenses for staff
- Expenses for volunteers
- Other
- Publicity and promotion
- Evaluation
- Contingency
- New build work
- Community grants
- Full Cost Recovery
- Inflation

Description of cost

[Text field – 50 words]

Amount

This can be an estimate [Enter figure]

VAT Amount

This can be an estimate [Enter figure]

Help with cost types

New staff costs

Include costs of new fixed-term contracts, secondments – who are people temporarily transferred to your organisation, and the costs of freelance staff to help develop your project. Do not include the costs of paying trainees here.

You must also openly advertise all project staff posts, unless you have a suitably qualified member of staff on your payroll that you are moving into a project post. You need to provide a job description for this post.

If you are extending the hours of a suitably qualified member of staff on your payroll, so that they can work on the project. In this case we will fund the cost of the additional hours spent on the project and you will need to tell us about their role.

If you are moving an existing member of staff into a post created by the project, then your grant can either pay for the cost of this member of staff, or for the cost of backfilling their position.

All salaries should be based on sector guidelines or similar posts elsewhere.

Professional fees

Fees should be in line with professional guidelines. For example, those of RIBA, The Royal Institute of British Architects, and should be based on a clear written specification.

Recruitment

This can include advertising and travel expenses. We expect your organisation to keep to good human-resource practice and follow all relevant laws.

Purchase price of heritage items

If your project involves buying a heritage item, you must get an independent valuation to help show that this item can be bought for a realistic price. If you are a private individual or commercial organisation you cannot include costs here.

Repair and conservation work

This includes costs of work to repair, restore or conserve a heritage item, building or site.

Event costs

Costs for any events, for example, refreshments or room hire.

Digital outputs

Any costs that you require to create digital outputs. Digital outputs are things you create in a digital format which are designed to give access to heritage. They could also help people engage with and learn about heritage. For example, a collection of digital images or sound files, an online heritage resource or exhibition or a smartphone app.

Equipment and materials, including learning materials

For example, historic costumes, hard hats to give site access, art materials or leaflets and publications.

Training for staff and training for volunteers

Existing and new staff and volunteers may need training to carry out your project.

Travel for staff and travel for volunteers

To help staff and volunteers travel to sites. Travel costs by car should be based on 45p a mile.

Expenses for staff and volunteers

You can include the costs of expenses for staff and volunteers to make sure they are not out of pocket.

Other

Please use for any costs that do not fit with any of the other cost headings. Give a clear description of these costs.

Publicity and promotion

You can include the costs of promotional materials that relate directly to your project

Make sure that you acknowledge the support of the National Lottery.

Evaluation

This cost heading is mandatory. All projects must be evaluated. Our advice is to budget up to 5% of your costs towards evaluation. Depending on the scale of the project and how complicated it is, you may want to employ somebody to help evaluate your project and assess whether you are successfully achieving the outcomes you set out in your application.

Contingency

This cost heading is mandatory. A contingency is only used 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, unless you have a particularly complex capital project where a higher level may be required. Make sure that you only include your required contingency here and not within the other cost headings in the application.

Support for your project

Are you getting any cash contributions to your project?

- Yes, I am getting cash contributions
- No, I am not getting any cash contributions

If yes: Add a cash contribution

- Description of cash contribution [Text field – 50 words]
- Amount: [Enter figure]

Is this cash contribution secured?

Select one option

- Yes and I can provide evidence
- Yes but I do not have evidence yet
- No
- Not sure

If you select 'Yes and I can provide evidence': Evidence could be a letter from the contributor, or a copy of bank statements to show the funds. [Upload file]

Help with cash contributions

What do we mean by cash contributions?

Cash contributions include any additional funds you expect to receive for your project.

Do I need cash contributions?

You do not need to have cash contributions at this grant level, so don't worry if you cannot add anything to this section.

However, if you tell us that you are getting money from elsewhere, we will need to see evidence of this, as it helps with our assessment.

What is a secured contribution?

By secured we mean the cash in your bank account reserved specifically for this project, or grant money has been formally offered. You can add evidence later in your application.

Your grant request

Applicant is shown a summary of their grant request, breaking down their total project costs, their cash contributions, and the resulting grant request.

At this point, they can go back to change their costs or contributions, before continuing with the rest of the application.

Add a non-cash contribution

- Description of non-cash contribution [50 words]
- Estimated value: An estimate of how much this would have cost if your project had to pay for it. [Enter figure]

What are non-cash contributions?

Non-cash contributions are things you need for your project that you do not have to pay for.

For example, the use of a room in a local business, or materials being donated by a local firm.

Volunteers

Tell us what you already have in place to help with your project.

Add a volunteer

Volunteers are people who give up their time for free to help deliver your project.

- Description of volunteers [Text field – 50 words]
- Hours [Enter figure]

Evidence of support

Send us evidence to support the commitments made to your project.

What do we mean by evidence of support?

Evidence could be letters, emails or videos from people that support your project. For example:

- A supportive letter from your local MP
- An email from people involved in your project
- A video from your local school

Describe the evidence you are providing

[Text field – 50 words]

[Upload a file]

Supporting documents

Upload your organisation’s governing document

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

What is a governing document?

A governing document 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.

How it looks will depend on what sort of organisation you are.

For example: rules of association of an unincorporated local community group or club, articles of association of a company limited by guarantee, a trust deed setting up a charity.

The Charity Commission provides guidance on creating a governing document.

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.

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.

The name on your governing document must match your organisation name and it must be signed and dated.

[Upload a file]

Upload your organisation’s accounts

Before we assess your application, we need to see your organisation's most recently audited or verified accounts.

You do not need 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.

Make sure your accounts are recently audited or verified by an accountant.

[Upload a file]

Upload your project plan

All projects must submit a project plan. We recommend you use the template provided on our website.

[Upload a file]

Upload briefs for any internally or externally commissioned work

Briefs describe any work you plan to commission during your project. If you are commissioning work (e.g. from an artist or architect) then you should submit a brief. The brief should describe the works, how long they will take, and how much they will cost. You can find a template brief on our website.

For fees over £10,000 you should obtain 3 competitive tenders or quotes. For fees over £50,000 we will expect you to provide proof of the competitive tendering process.

[Upload a file]

Upload project images

If relevant, please provide images that help illustrate your project. For example, if your project focus is a local photography archive, you may wish to provide a few images of the collection. Or, if your project involves a community garden, you may wish to provide a map.

If you are seeking to improve a landscape or conservation area you should include a map of the area that shows the location of all the projects you will deliver.

[Upload a file]

Upload calculations for full cost recovery

If you are an organisation in the voluntary sector, we can cover a proportion of your organisation's overheads commensurate with the time or resources used for your project. We can also cover a proportion of the cost of an existing member of staff, as long as they are not working exclusively on the project.

We expect this contribution to be calculated using Full Cost Recovery. If you are including Full Cost Recovery in your project budget, you must include a document that outlines your calculation. You can find a spreadsheet to help you calculate this figure on our website.

[Upload a file]

Check your answers

Applicant is shown a summary of all their answers, with the option to go back and change an answer from this page.

Confirm declaration

We run qualitative user research to help us to develop our products and services. This could be from a 20 minute survey to a 2 hour interview.

- Tick this box if you would like to be involved in our research, or find out more. [Tick box]
- I have read and agreed with the declaration. [Tick box]

Declaration

a) Terms of Grant

You must read the standard terms of grant for this programme on our website.

By completing this Declaration, you are confirming that your organisation accepts these terms. For partnership projects, all partners must confirm that they accept the standard terms of grant by adding a contact at the end of the declaration.

b) Freedom of Information and Data Protection

We are committed to being as open as possible. This includes being clear about how we assess and make decisions on our grants and how we will use your application form and other documents you give us. As a public organisation we have to follow all data protection laws and regulations, to include European Parliament directives and regulations that are applicable and in force from time to time (the 'Data Protection legislation'). As defined by the Data Protection legislation the Trustees of the National Heritage Memorial Fund (who administer the National Lottery Heritage Fund) is a data controller.

As part of the application process we will collect your name and position at the organisation you represent. We may share this information with one of the consultants on our Register of Support Services if they are appointed to help support you on your project. We do not transfer your data to any third parties based outside of the EU. Our Privacy Policy contains additional information including contact information for our Data Protection Officer. It can be found on the National Lottery Heritage Fund website.

When you complete the Declaration at the end of the application form, you are confirming that you understand our legal responsibilities under data protection legislation and the Freedom of Information Act 2000 and have no objection to us releasing the About your project and Support for your project sections of the application form to anyone who asks to see them once your application has completed the assessment process. If there is any information in these sections of the form that you don't want made publicly available, please explain your reasons below:

[Text box]

We will take these into account when we respond to any request for access to those sections. We may also be asked to release other information that you provide to us. We will respond to these requests after taking account of your rights and expectations under Data Protection legislation. In those cases, we will always consult you first. We will not be responsible for any loss or damage you suffer as a result of our meeting these responsibilities.

- To decide whether to give you a grant.
- To provide copies to other individuals or organisations who are helping us to assess, monitor and evaluate grants.
- To share information with organisations and individuals working with us with a legitimate interest in National Lottery applications and grants or specific funding programmes.
- To hold in a database and use for statistical purposes.
- If we offer you a grant, we will publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and in the publications or websites of relevant Government departments and any partner organisations who have funded the activity with us.
- If we offer you a grant, you will support our work to demonstrate the value of heritage by contributing (when asked) to publicity activities during the period we provide funding for and participating in activities to share learning, for which we may put other grantees in contact with you.

We may contact you from time to time to keep you informed about the work of the National Lottery Heritage Fund.

[Tick box if you would like to be kept informed of our work]

- I confirm that the organisation named on this application has given me the authority to complete this application on its behalf.
- I confirm that the activity in the application falls within the purposes and legal powers of the organisation.
- I confirm that the organisation has the power to accept and pay back the grant.
- I confirm that if the organisation receives a grant, we will keep to the standard terms of grant, and any further terms or conditions as set out in the grant notification letter, or in any contract prepared specifically for the project.
- I confirm that, as far as I know, the information in this application is true and correct.

Are you applying on behalf of a partnership?

- Yes
- No

If yes:

Please tell us the organisation(s) you will be delivering your project in partnership with and provide a contact for each partner organisation (name and position).

[Text box]

Page updates

We will regularly review this guidance and respond to user feedback. We reserve the right to make changes as required. We will communicate any changes as quickly as possible via this webpage.