



Heritage Emergency Fund application information

To support applicants interested in applying to the Heritage Emergency Fund, we are providing this list of application questions. This is for reference only, you will still need to apply online. Please note that it is not possible to save the online form so you will need to fill it out in one go and submit. You may therefore find it helpful to prepare your answers using the reference questions below and save your answers offline. Ensure that you are drafting your application within the stated word count of 1,500 words, (2000 words for over £50,000 applications) as this will help us assess your application in a timely way. If you are applying for less than £50,000, you do not have to complete questions 11 and 32.

Your organisation and project

This information helps us link your application to your past or current projects with the National Lottery Heritage Fund

1. Name of organisation

2. Most recent National Lottery Heritage Fund project reference number: You can find the project reference number on emails from the Fund. Format example is HG-20-00034

Contact details

Use this section to tell us the names and contact information for the people applying for this funding.

3. Contact details: name of contact number 1

4. Contact details: email address of contact number 1

5. Contact details: phone number of contact number 1

6. Contact details: name of contact number 2

7. Contact details: email address of contact number 2

8. Contact details: phone number of contact number 2



Organisation details

Use this section to tell us about your organisation.

9. Is your organisation a registered charity?

10. Enter registered charity number, if answered yes above.

11. Tell us about the specific heritage you manage or care for and the reasons why it is at risk.

If you are applying for under £50,000 you do not need to answer this question.

(250 word limit)

Costs

Use this section to tell us about the essential costs you're applying to cover.

12. What is the total amount of money you are applying for from the Heritage Emergency Fund?

Please tell us whether you have included VAT – you should exclude it from the costs if you can reclaim it.

13. Does this amount include VAT?

Yes/No

14. Please list the costs that add up to the total amount you are applying for, including where you are asking for VAT against each figure

(100 word limit)

Your finances

In this section, we're looking for details about the current financial status of your organisation - particularly for the period and costs that you're applying for.

15. In your last full year of operation, what % of your income was derived from earned sources as opposed to revenue grants or other fundraising that supported your day-to-day operations?

Please enter the percentage figure without the %, for example, 30 for 30% Earned income includes admission charges, retail, events, room hire. If you have a trading



subsidiary, please include this income in your overall calculation. Tell us about any earned income that you could not use to support day-to-day operations, for example.

16. In the current financial year are you expecting to receive any revenue grant funding that is not project specific and that you can use to support day-to-day operations?

Yes/No/Don't know

17. Tell us about this funding, if answered yes above

18. Have you applied, or are you planning to apply for, any Covid-19 schemes?

For example: Support from central government, for example, HMRC schemes/Support from other lottery distributors/Support from other organisations, for example, trusts, local authorities.

Yes/No

19. If yes, please tell us how much you have applied for and when you will know the outcome

(100 word limit)

20. As the details of some Covid-19 related funding schemes are not yet clear, tell us about any concerns you may have about your eligibility for them, the timing of receipt of grants and how you plan on bridging any gaps around this timing.

(200 word limit)

21. Tell us about any investment funds that your organisations has, including last valuation and purpose

(50 word limit)

This is for information, we understand that these funds may be restricted and we are not expecting you to sell at short notice if undesirable.

22. Do you have a formal reserves policy or a policy to hold funds for specific purposes?

Yes/No/Don't know

23. If yes, how much available money do you have in reserves?

24. If yes, briefly tell us about the policy



(200 word limit)

25. If yes, how many months of reserves do you currently hold? Please enter the number

26. Do you have any significant fixed operating costs that are specific to the heritage you care for? For example, livestock costs for habitat management.

Yes/No/Don't know

27. If yes, provide an estimate of the total of these costs in the current financial year (20/21).

28. What do you need to do now to stop your organisation being at risk? What have you already done to reduce your outgoings? What more do you plan to do?

29. How much free reserves and other funding is immediately available to support the short-term operation of the organisation? Please enter the amount

30. How long is this expected to last, in months?

Ignore funds that are reserved for projects that you are contractually committed to and take in to account any reduction of costs that you have already implemented.

31. Has your organisation faced any significant sustainability concerns in 2019 or in early 2020 prior to the impact of Covid-19 arising?

(100 word limit)

If yes, please summarise. In this context, we mean concerns as to whether you might be at risk of closure in the next two years unless you secure additional funding or implemented a reorganisation plan.

32. Tell us about the nature of the work your organisation does and how you are contributing to our outcomes around economic regeneration, inclusion and wellbeing.

(300 word limit)

33. Tell us how the heritage you manage and care for contribute to making your local area a better place to live, work and visit.

Tell us about any existing partnerships you have in the local community.

If you are applying for under £50,000 you do not need to answer this question.



(300 words)

34. Where is your organisation based?

The Fund has offices across the UK, if you are not sure where you are based there is a map here: <https://www.heritagefund.org.uk/in-your-area>

Scotland/Wales/Northern Ireland/England: London and South/England: Midlands and East, England: North/Not sure

Declaration section

35. 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.

36. Data and Freedom of Information

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 Your organisation and 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:

37. Data Protection and Research

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 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 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.

38. Contact

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

39. Confirmation

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.

40. We will be in touch following submission of your form to us and we may request additional documentation. If you have any issues please contact us, details are here <https://www.heritagefund.org.uk/about/contact-us>

If you have any feedback on the form please let us know here.