


# National Lottery Grants for Heritage £250,000 to £5million

## Application questions and help notes


### Introduction

You can use this guide to assist you in completing the application form for grants from £250,000 to £5million. This document is for reference only and should not be filled in. You can begin your online application by logging on to [our website](#).

This document includes the application questions so you can see what we will ask you before you begin your application. It also includes some help notes to help you answer the questions (these are also included in the online application form when you click the information icon: )

The full application form is only available to be [filled in online](#). It is important that you read the [application guidance](#) before you apply. The application guidance will help you prepare your application and includes a handy checklist to make sure you are ready to apply.

### Application form questions

Throughout the application form you will notice information icons  next to a number of questions and statements. If you click on the icon you will be provided with more information about what to include in your answer or an explanation about how a certain part of the form works.

- Please note that the overall word limit of this form is 10,000 words. You will not be able to submit your application if you exceed this limit. Please note that dashes in the text count as whole words. If you decide to copy and paste text directly into your application, please review your application before submission and make changes where necessary to ensure you do not exceed the stated word count limit.
- Don't forget to save the progress of your application as you work on it.
- We will not assess your application if you have not supplied the correct supporting documents (please do not send more than we ask for) or have not answered all of the questions.

Please use clear, simple language and make sure you include any facts or figures that will help us understand what you want to do and why you want to do it.



We will only assess your application if you supply the correct supporting documents and answer all of the questions. Please do not send additional documents with your application.

## Section one: Your project

**Name of your organisation:** This will auto populate from the information you provided at registration.

**Project reference number:** This will auto populate.

**Project Title:** Please note this will be published on our website and seen by our decision takers.

Info icon: We recommend keeping your title simple and to the point. There is a limit of 15 words for your project title.

### 1a Is this your organisation's first application to us? Yes/No

**If no:** Please tell us the reference number and project title of your most recent application.

### 1b Summarise your project

In no more than **200** words please provide a summary of your project, 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 assessment of your application.

### 1c Where will your project take place?

If your project will take place across different locations, please use the postcode where most of the project will take place.

For landscape projects, please provide an Ordnance Survey grid reference for your landscape.

### 1c Explain what need and opportunity your project will address

#### Info icon: Development phase

Tell us about any problems and opportunities there are relating to how:

- Your heritage is managed now and its condition
- People engage with the heritage now
- Tell us how your project will address these problems and opportunities
- Tell us how your project fits with any local strategies or wider initiatives

- Tell us about any feasibility and options appraisals that have been carried out and why your project is the best and most viable way forward
- If your project will improve an area of landscape or townscape tell us about the current condition of the area

**Delivery phase:**

- Tell us about any consultations or survey work you have done during the development phase
- If you have produce one, refer us to your conservation plan
- Where necessary, refer us to your activity plan

**1e Why is it essential for the project to go ahead now?**

**Info icon:** Tell us why you need Lottery funding.

**Development phase:**

- Tell us if the risk to your heritage is critical
- Tell us about any partnership funding that is available to you now that won't be in the future
- Tell us what will happen if you do not get a grant from us

**Delivery phase:**

Provide information from any further research you have carried out during the development phase.

**1f Tell us what advice you have received in planning your project and from whom**

**Info icon: Development phase:**

- Tell us if you have received any specialist advice.
- Tell us about any consultation you have done with your local community and those who will be involved in your project. Tell us if this has shaped your project proposals.
- Tell us if you have received any pre-application advice on planning and/or listed building consent matters.

**Delivery phase:**

Provide any information from any further consultation or survey work you have done during your development phase. Where necessary, refer to your activity plan.

**1g Tell us about the people who will benefit from your project**



**Info icon:** We would like to know more about the range of people that will be involved with and/or benefit from your project.

Tell us about any action you will take to overcome barriers to involving people with heritage.

### **Development phase:**

Give us an indication of the main groups of people that will benefit from your project.

Tell us how your project has been designed to support an increase in engaging these groups with heritage.

Provide an estimate of the number of participants that will be involved in your project.

By participants we mean the people who are taking part in your project rather than the people who are contributing their time to help deliver your project.

### **Delivery phase:**

Provide specific information about the main groups of people that will benefit from your project. Where necessary, refer us to your activity plan.

### **1h Does your project involve heritage that attracts visitors?**

**If yes:** Tell us

How many visitors did you receive in the last financial year?

How many visitors a year do you expect on completion of your project?

### **1i. Will your project be delivered by a partnership? Yes/No**

**If Yes:** Who are your partners? Please provide a named contact from each organisation and if applicable ensure that a representative from each has been added to the end of the Declaration in Section eight.

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

**Info icon:** 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.

**If your partner owns the heritage you are working on, we will usually ask them to sign up to the terms of the grant too.**

You need to provide a partnership agreement if you are working with another organisation who is delivering a significant part of your project.

**1j. What measures will you take to increase positive environmental impacts and reduce negative environmental impacts?**

We expect the highest standards of environmental sustainability to be delivered by all the projects we fund.

We want **all our projects** to do their very best to help mitigate against and adapt to the effects of our changing climate and to help nature recover. Whether our funding is conserving a nature reserve, a museum, a public park or a building, we will expect projects to take the opportunity to create positive benefits for nature by, for example, creating roosts for bats, including green roofs, providing ponds for natural drainage and increasing tree planting.

We want all **kinds of heritage projects**, large and small – to:

- limit any potential damage on the environment
- make a positive impact on the environment and particularly for nature

**Info icon:** We expect applicants to consider what steps they can take to create positive environmental impacts and reduce negative environmental impacts through their project. The measures that you implement should be appropriate for the scale of your project.

Increasing positive examples:

- tell people how to get to your site or events by public transport
- use compostable/biodegradable plates and cutlery for event catering
- use local suppliers
- use recycled and/or environmentally friendly materials
- recycle your waste
- tell people about the environmental measures you have implemented
- Increasing biodiversity (green roofs, bat and bird boxes, insect holes, bee-friendly planting etc)
- Using recycled materials and products e.g. paper
- Thinking about local sourcing of products and materials and reducing 'food miles' in cafes
- Encouraging sustainable travel e.g. bus or train, walking or cycling
- Telling visitors about how the organisation is adapting to climate change and environmental measures used on the site.

Reducing negative examples:

- Reducing energy use (more efficient heating, LED lighting, better control systems etc) and using renewable energy or energy generated on site.
- Reducing water use (recycling grey water, low flush WCs etc)
- Reducing use of plastics, especially single use plastics.
- Reducing waste produced on site/having an effective recycling policy.

The measures that you implement should be appropriate for the scale of your project. We provide additional guidance on our Environmental Sustainability requirement on the [Outcomes webpage](#) and [Good Practice Guidance section](#) of our website.

**1k As well as acknowledging your grant as set out in our requirements, we also ask you to provide special access and/or offers for National Lottery players. Please tell us how you would do this.**

**Info icon:** Promoting and acknowledging the National Lottery is a condition of our grants. Read the guidance on our website for the minimum requirements for doing this. We expect you to develop innovative and creative offers or promotions designed to thank National Lottery players for their support and to raise awareness of your funding. Examples of these, and other imaginative things that projects have done can be found on our [website](#).

If your grant is for more than £1million towards a new exhibition space, visitor centre, community garden or other public facility, we would also like to discuss how The National Lottery might best be incorporated into the name of the space or site.

## **Section two: The heritage**

**2a Tell us about the heritage in your project and why it is important to your organisation and community.**

**Info icon:** Please note, your project must relate to national, regional or local heritage of the UK.

Provide a description of the heritage as it is today. If different types of heritage are involved, describe each of these:

**Provide an explanation of what is important about the heritage. Tell us whether it is:**

- A source of evidence of knowledge
- Of aesthetic, artistic, architectural, historic, natural or scientific interest
- Of social or community value

Tell us who the heritage is important to. This could include experts and/or the local community.

**Delivery phase:**

Provide an update based on the planning work you have done during the development phase, or refer us to your conservation plan if you have produced one.

**2b Select the heritage type that is the main focus of your project**

Please note you can only select one option:

- Collections
- Community heritage
- Landscapes and nature
- Historic buildings and monuments
- Industrial, maritime and transport
- Cultures and memories
- Other

**Info icon: Community Heritage:**

Projects focusing on a range of heritage in a geographic community, or projects about a particular community of interest/social background.

**Industrial, Maritime and Transport:**

Aircraft, vehicles, locomotives, rolling stock, vessels, or buildings, special infrastructure/ fixed installations and machinery (e.g. mines) associated with our industrial, maritime or transport history.

**Cultures and Memories:**

For example, projects focusing on collecting oral histories, on cultural traditions such as music or fashion, or projects about the heritage of language and dialects.

**2c Is the heritage considered to be at risk? Yes/No**

**If yes:** explain why you consider the heritage to be at risk and how.

**Info icon: Development phase**

Briefly explain why the heritage is under threat, and what actions have been taken (if any) to minimise the risk. It could be at risk of loss through physical damage or neglect, financial shortfalls or people passing on in the case of oral and community histories.

If your project involves a building or a monument, tell us if it is on the buildings or monuments at risk register.



If your project involves several buildings in a conservation area, tell us if the conservation area is on the at risk register.

If your project involves natural heritage, tell us if the landscape, geology, habitat or species is at risk and in what way (for example, identified in a Biodiversity Action Plan as a priority).

**Delivery phase:**

Provide an update based on the planning work you have done during the development phase, or refer us to your conservation plan if you have produced one.

**2d Does the heritage have any formal designation?**

Please select the options that apply.

**2e Will you be undertaking any capital work as part of your project? Yes/No**

If Yes, tell us:

- The name of the building(s), collections, landscapes or habitat
- If any Statutory Permissions or Licenses are required to carry out the project
- Whether these are in place?

**Info icon:** Capital works are defined as works that create or improve an asset.

By capital work we mean digitisation of collections, a conservation programme for objects and collections, repair and conservation works or new build, refurbishment and redisplay of galleries and/or buildings.

For example, conservation of a heathland, repairs to a war memorial and digitisation of a photographic archive would all be considered as capital works.

Reusing and adapting built heritage has an important role to play in reducing carbon emissions and tackling climate change, and whilst new build might be necessary and appropriate, in some cases we will prioritise re-use and sensitive adaptation of existing buildings.

For landscape and nature capital projects we will prioritise those that focus on one or all of the following themes; support nature's recovery, deliver nature-based solutions to climate change and/or help people reconnect with nature.

For projects involving physical works, for example conservation to a historic building or new building work, please read the ownership requirements section of the programme guidance and refer to the receiving a grant guidance.



**Statutory Permissions or Licences:** For example, Listed Building Consent, Planning Permission, Scheduled Monument Consent, Faculty, Bat Licence, Tree Felling Licence etc.

You do not need to have secured Statutory Permissions and / or Licences before applying to us at development phase.

All Statutory Permission and / or Licences must be in place before your project can begin.

**2f 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 options that apply to your heritage.

**Info icon:** Please read the ownership requirements section of the programme guidance and refer to the receiving a grant guidance.

**Are there any legal conditions, restrictions or covenants associated with heritage asset which may affect your project?**

If yes: please provide details.

**Has a condition survey been undertaken for the heritage asset in the last five years?**

If 'Your Organisation' is selected, tell us:

- If your organisation have the freehold of the building or land, or own outright the heritage items;
- If your organisation have the lease of the building or land and how many years are left to run on the lease;
- If your organisation has, or you are 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.

**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

**If 'Neither' is selected:** If you do not currently meet our ownership requirements, tell us the date when you expect to do so.

### **2g Does your project involve the acquisition of a building, land or heritage items?**

**Info icon:** Please read the buying land and buildings section and the buying heritage items and collections section of the programme guidance and refer to the receiving a grant guidance.

## **Section three: Managing your project**

### **3a Has your organisation undertaken a similar project in size and scope in the last five years? Yes/no**

If yes: Please provide brief details

### **3b. Tell us why this is the most appropriate project for your organisation to take on at this time**

What other strategies have been considered?

What will you do if the project does not go ahead?

### **3c. Does your organisation need to undertake any capacity building activity to better deliver your project?**

**Info icon: Development phase:**

For example, do you need to review your financial or HR system, develop your business plan or build fundraising capacity?

Do you need to bring in any extra skills or expertise?

Tell us whether you will be making changes to the governance of your organisation, to enable you to deliver your project more effectively. You can include the costs of professional support for a governance review.

**Delivery phase:** What work have you undertaken to strengthen the capacity of your organisation to deliver this project?

3d. Tell us about the jobs and/or apprenticeships that you will create to deliver your project

**Info icon Development phase**

Provide an estimate of any jobs and / or apprenticeships that will be created and will be directly involved in delivering your project. Tell us what their main roles will be and whether they are full-time or parttime positions.

If you are moving an existing member of staff into a post created by this project, or extending the hours of an existing member of staff, tell us how they are qualified for the role created by the project.

Describe how you will choose the staff.

You will need to provide a job description for each role created for the development phase of your project as a supporting document to your application.

**Delivery phase:**

Update in line with planning work you have done during your development phase.

If you are moving an existing member of staff into a post created by this project, or extending the hours of an existing member of staff, tell us how they are qualified for the role created by the project. Tell us how you will manage the work they are currently doing, or if this is coming to an end.

You will need to provide a job description for each role created for the delivery phase of your project as a supporting document to your application.

## **Development phase**

### **3e. What work will you do during the development phase of your project?**

Read about the key tasks you need to complete during your development phase in the programme guidance.

Tell us how you will produce all of the supporting documents required with your delivery phase application.

#### **Welsh Language**

If your project is to take place in Wales, you must consider the Welsh language in all aspects of your work and tell us how you will promote and support the Welsh language and reflect the bilingual nature of Wales. You will need to demonstrate how you will offer bilingual provision in your project's budget and plan. Please include budget for translation under the 'Other' costs category within the application form

project costs section. If you have any questions, queries, or require assistance, please get in touch with [cymorthcymraeg@heritagefund.org.uk](mailto:cymorthcymraeg@heritagefund.org.uk).

### **3f. Who are the main people responsible for the work during the development phase of your project?**

**Info icon:** Provide detailed information about the team that will work on your development phase, including the person who will take overall responsibility.

Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place.

Describe how you will choose the services and goods needed during your development phase. You will also need to send us:

- briefs for any consultants for your development phase.

### **3g. Complete a detailed timetable for the development phase of your project**

**Info icon:** Fill in the table with specific tasks during your development phase and tell us who will lead on these activities.

Tell us when you are hoping to submit your delivery phase application.

You can add more headings for the tasks you will deliver.

### **Area Action Plan**

If your project covers an area of townscape, landscape or is delivered in multiple places, then you may prefer to produce an Area Action Plan instead of a separate conservation plan, activity plan, and management and maintenance plan.

### **3h. Tell us about the risks to the development phase of your project and how they will be managed**

**Info icon:** All projects will face threats and opportunities that you need to identify and manage. We want you to be realistic about the risks your project may face so that you are in a good position to manage them.

We understand that the context you will be working in is very different during the current Covid-19 pandemic. When assessing your application, we will make a measured judgement on the potential risks to your project and current organisational risks – and we will look to see if you have identified these and told us how you will mitigate against them. You should also carefully consider contingency costs within your application.

Use the table to tell us what the risks are for your development phase. You may find it useful to refer to the information button for question 3m.

When you enter your development phase, it's likely that your project proposal will be quite outline. Information that you gather during your development phase through consultation and survey work may mean that you need longer for your development phase than you had planned for, or that you need to do more investigation than you thought. Thinking about these risks now will help you manage them should they arise.

### Delivery phase

3i. Who are the main people responsible for the work during the delivery phase of your project?

**Info icon:** **Development phase:** Provide outline information about the team that will work on your delivery phase, including the person who will take overall responsibility.

Tell us if you will need extra support from consultants or new staff.

Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place.

**Delivery phase:** Provide detailed information about the team that will work on your delivery phase, including the person who will take overall responsibility.

Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place.

Describe how you will choose the services and goods needed during your delivery phase

You will also need to send us:

- A project management structure;
- Briefs for any consultants.

If you are sending us a project business plan, tell us where to find the information above in this.

### 3j. What work will you do during the delivery phase of your project?

**Info icon:** **Development phase:** Provide outline information about what your project will do during your delivery phase.

**Delivery phase:** Provide detailed information about what your project will do during delivery phase.

**Welsh Language:** If you are delivering your project in Wales, you will need to tell us how you will promote and support the Welsh Language and reflect the bilingual nature of Wales.

### **3k. How do you plan to cash flow your delivery phase?**

**Info icon:** Grant payments are made in arrears, (with the exception of a development grant of less than £100k - please refer to the receiving of grant guidance for more information) therefore you need to ensure you are able to successfully cash flow the expenditure of your project in order to avoid experiencing financial difficulties.

You will need to provide a cash flow with your delivery phase application.

#### **Development phase:**

Tell us about any financial reserves, income from your organisation or other sources of funding you will access to cash flow the delivery phase of your project.

#### **Delivery phase:**

Provide an update on how you will cash flow the delivery phase of your project.

### **3l. Complete a summary timetable for the delivery phase of your project**

Complete the table.

**Info icon:** Development phase: Identify the main tasks in your delivery phase, including capital work and activities to engage people with heritage. The heading 'anticipated practical completion date' will automatically appear in the timetable, which refers to the practical completion certificate which will be issued by your contractor towards the end of a capital project. If your project includes capital work, please enter the date this is issued in both the 'start date' and 'end date' columns. This is likely to be most relevant at delivery phase.

**Delivery phase:** You will need to provide a detailed timetable for your delivery phase with your application. It should contain all parts of your project, such as choosing consultants, any further research or consultation that's necessary, design, reviews, activities and evaluation.

For projects involving capital works you should include the remaining RIBA stages of the project in line with the RIBA Plan of Work (2013) as well as indicating the anticipated practical completion date. If you are sending us a project business plan, tell us where to find the information in this.

**3m. Tell us about the risks to the delivery phase of your project and how they will be managed**

All projects will face threats and opportunities that you need to identify and manage. We want you to be realistic about the risks your project and organisation may face so that you are in a good position to manage and deliver the project successfully. We understand that the context you will be working in is very different during the current Covid-19 pandemic. When assessing your application, we will make a measured judgement on the potential risks to your project and current organisational risks – and we will look to see if you have identified these and told us how you will mitigate against them. You should also carefully consider contingency costs within your application.

Development phase: Use the table to tell us what the risks are for your delivery phase.

We want you to be realistic about the risks your project may face so that you are in a good position to manage them. These risks could be:

- technical – for example, discovering unexpected and wide-ranging damp;
- financial – for example, a reduced contribution from another funding source;
- organisational – for example, a shortage of people with the skills you need or staff needed to work on other projects;
- economic – for example, an unexpected rise in the cost of materials;
- social – for example, negative responses to consultation or a lack of interest from your target audience;
- management – for example, a significant change in the project team;
- legal – for example, changes in law that make the project impractical; or
- environmental – for example, difficulties in finding sources of timber from well managed forests.

The risks you identify will affect the amount you allocate to contingency in Section six: Project costs.

**3n. When do you expect the delivery phase of your project to start and finish?**

**Info icon:** You will not be able to start the delivery phase of your project until your application has been successful.

**3o. Are there any fixed deadlines or key milestone that will restrict your project's timetable? Yes/No**

If Yes: Please provide details.



**Info icon:** Please tell us about any immovable dates that will affect your project and are beyond your control.

For example:

- Dates when partnership funding offers expire or secured funds must be spent by
- Anniversaries that your project is designed to celebrate
- External events that are key to your project's success

### Section four: Project outcomes

We describe the difference we want to make with our funding through a set of nine outcomes, which include our six priority outcomes for 2021-22 as a response to the COVID-19 pandemic. They are:

- A wider range of people will be involved in heritage (This is a mandatory outcome. Every project we fund must achieve our mandatory outcome as a minimum .)
- the funded organisation will be more resilient
- people will have greater wellbeing
- people will have developed skills
- the local area will be a better place to live, work or visit
- the local economy will be boosted

We also expect all projects to demonstrate that they are building **long-term environmental sustainability** into their plans.

We encourage you to focus on achieving one or more of our priority outcomes at this time. The number of outcomes you achieve will depend on what you want to deliver and should be proportionate to the size of grant you are requesting or the specific focus of your project. There is no obligation to name more than one, and we strongly encourage you not to claim more outcomes than you really think you can deliver. We recognise that many of the outcomes are interrelated and we would advise you to focus on the key needs of your project and outline these under the outcomes that best capture this.

Please refer to the text below for updated **priority outcomes** information. **Do not** use the help icons embedded in the Outcomes Section of the online application form for these updated outcomes.

Please refer to the website for the additional information on project outcomes:

<https://www.heritagefund.org.uk/funding/outcomes>

## A wider range of people will be involved in heritage

### **Mandatory outcome**

This outcome must be achieved as part of your project. There are other outcomes your project might achieve, but this one is mandatory.

### ***What this outcome means***

If your project is a success, then the range of people benefiting from heritage will be more diverse than before your project started.

To achieve this outcome, you'll need to include audience development work and community consultation in your planning.

You will need to collect and analyse information about the people who engage with your heritage - and those who don't - and you'll need to track how this changes over time.

There are many ways that technology can help you reach this outcome, and help more people know about and engage with your project. For example, you could have a project website or blog, you could promote your work through social media, and you could run consultations or activities online. See our [Digital Skills for Heritage](#) initiative for ideas and support.

### ***What we are looking for***

Signs that your audience or volunteer profile has changed between the start and end of the project might include a broader range of ages, ethnicities and social backgrounds, more disabled people, or groups who have never engaged with your heritage before.

## The funded organisation will be more resilient

### **What this outcome means**

If your project is a success, your organisation will have a greater ability to adapt to changing circumstances to give you a secure future. This includes both the capacity to manage threats and challenges and being able to respond to new opportunities.

You will demonstrate that you understand the organisation's current strengths and weaknesses. You could then achieve greater resilience through:

- stronger more diverse governance
- greater local involvement in your organisation
- increased management and staff skills
- effective use of digital
- fresh sources of expertise and advice



- working in partnership to share services, staff and resources

### ***What we are looking for***

You might have increased income, or generated income from a different mix of sources, including commercial activity, endowments or new fundraising programmes.

A more resilient organisation might make use of new technology and establish new ways of working digitally with other organisations, including pooling expertise and resources.

You might have increased capacity and skills through training, or recruiting new and more diverse board members or volunteers. You should also be able to demonstrate that you have wider, and more inclusive, support and involvement from communities and audiences.

The changes you make as part of your project, should enable you to show you are in a measurably stronger position for the future.

## **People will have greater wellbeing**

### **What this outcome means**

If your project is a success, individuals will feel more connected to those around them as a result of your project. They may also feel more connected to the place where they live. This is what we mean by greater wellbeing.

To achieve this outcome, your project should be designed to impact on wellbeing. It should be developed with expert organisations if you plan to involve people through mental health services or people with learning disabilities.

You might provide opportunities for people to be more active or to meet and work together online. For example, volunteering in a park, taking part in community archaeology, sharing digital skills, or building new connections with others.

### **What we are looking for**

You, or your external evaluator, will use recognised evaluation methods to measure wellbeing.

You will ask people how they feel after experiencing your project.

Participants might report:

- increased happiness
- greater satisfaction

- reduced levels of anxiety
- feel that life is more worthwhile as a result of their involvement in your project

They will feel more connected to those around them, or to a community that meets online, or maybe more connected to the place they live in.

## **People will have developed skills**

### **What this outcome means**

If your project is a success, then individuals will have gained the relevant skills to make sure that heritage is better looked after, managed, understood or shared. This might include conservation, teaching or training, maintenance, digital and project management skills.

Structured activities could include:

- a mentoring programme
- on-the-job training
- paid training placements
- taking on an apprentice
- training sessions for volunteers
- external short courses

Activities might take place online or face to face, or as a mixture of these.

### ***What we are looking for***

People involved in your project, including staff, apprentices, trainees and volunteers, will be able to demonstrate competence in new, specific skills. Where appropriate, they will have gained a formal qualification or will have been supported into employment in the heritage sector.

We want to see a wider range of people involved in heritage through the creation of more inclusive training, entry level employment and progression opportunities.

## **The local area will be a better place to live, work or visit**

### **What this outcome means**

If your project is a success, people will see an improvement in their local area, and have opportunities to connect with it.

As a result of enhancing the heritage of the area - or from the opportunities you have provided for local people to get involved with, to visit and enjoy heritage - local people will report that they feel it makes the area a better place to live, work or visit.



There will be a feeling of greater pride in the local area and/or a stronger sense of community or belonging.

Visitors will find it easy to plan their trip and access information they might need ahead of time.

### **What we are looking for**

Local people will recognise improvements in the local area, and report increased appreciation for their shared places and spaces.

Visitors to the local area/heritage will also tell you that it has improved as a direct result of your project and what they value about it.

## **The local economy will be boosted**

### **What this outcome means**

If your project is a success, there will be additional income for existing local businesses and jobs will be created or supported. There may also be new businesses in your local area.

You'll be able to show that local businesses have benefited from your project. This will be because you spent your grant locally, or you encouraged more tourists to visit the local area. It may be because you provided new premises for businesses that moved into the area or expanded their operations within it, which resulted in new jobs being created or further investment in your local area.

### **What we are looking for**

You will be able to show that these changes have happened as a direct result of your project.

You'll do this by using information about the local economy, both before and after your project.

You can find this information from places such as your local authority, economic development agency or tourism organisations.

### **Other outcomes**

- Heritage will be in better condition
- Heritage will be identified and better explained
- People will have learned about heritage, leading to change in ideas and actions

**i Info icon:** The help icon can be referred to for more information on these other outcomes.

We would encourage you to focus on achieving one or more of our priority outcomes at this time. **For example**, if a project only delivered on the 'condition outcome' and the mandatory outcome – it would be much less likely to be supported than a project that met the mandatory outcome, plus another priority outcome.

## **Section five: After the project ends**

In this section, tell us about what will happen once your project has been completed.

### **5a. How will you maintain the outcomes of your project after the grant ends and meet any additional running costs?**

#### **Info icon: Development phase:**

Capital works to public parks, cemeteries and public gardens. To ensure that quality and standards of management and maintenance are maintained within the park, cemetery or garden following our investment, you must apply for, and achieve, a Green Flag Award in the first year after completion of your capital works, and retain this award every year for a minimum period of seven years. You can find more information about the Green Flag Awards and standards at [www.greenflagaward.org.uk](http://www.greenflagaward.org.uk).

You may include the cost of future Green Flag Award applications in your costs under 'other costs'.

- Provide outline information about how you will maintain the outcomes of your project, which you identified in Section four: Project outcomes;
- Tell us how you will manage and maintain any work you have done;
- Tell us how your project will be financially sustainable;
- Tell us how you plan to continue to engage a wider range of people after the project ends.

#### **Delivery phase:**

Provide detailed information about how you will maintain the outcomes of your project, in line with any consultation or research that you did during your development phase;

- Tell us if and how your organisation will change during the project, and how this will enable you to sustain the benefits of our investment;
- If you are sending us a project business plan, tell us where to find the information in this;
- If your project involves capital work, refer to your management and maintenance plan, where relevant;

- If you have produced a conservation plan, refer to this, where relevant;
- Tell us how you will continue to engage a wider range of people after the project ends;
- If appropriate, tell us about any strategies or policies that you will use to maintain the outcomes of your project

**5b. Tell us about the main risks facing the project after it has been completed and how they will be managed**

**Info icon:** **Development phase:** You may find it useful to refer to the information button for question 3m.

**Delivery phase:** Update in line with any information that you have gained during your development phase.

If you are sending us a project business plan, tell us where to find the information in this.

**5c. How will you ensure that the skills and knowledge developed whilst delivering your project are embedded within your organisation once it has ended?**

**Info icon:** For example, if the project will be overseen by a new project manager post, funded by the grant what are your plans to ensure that the knowledge and skills developed by that person along with the lessons learnt from the project will benefit the organisation beyond the grant. You could consider holding staff briefings, other knowledge sharing meetings or training. This could also form part of your evaluation planning.

**5d. How will you evaluate the success of your project and share the learning?**

**Info icon:** We expect all applicants to evaluate their project. You will need to create an evaluation plan at the start of your project. This will be an outline of how you are going to collect data to measure, analyse and understand what you are doing and ultimately to provide evidence about the outcomes your project has achieved. At the end of your project you will be required to write an evaluation of your project and submit it with your final completion report.

## **Section five: Project costs**

In this section of the form we want you to tell us how much it will cost to deliver your project. There is a limit of 30 words per 'description' field when completing the cost tables. A more detailed explanation and breakdown of your costs should be provided as part of your supporting documentation. Please see Section eight: Supporting documents.



Please note that your grant request will be rounded down to the nearest £100.

**Your total project costs must match your project income.**

**Info icon:** For any costs that are not covered by the cost headings listed please use the 'Other' heading. Please use the 'Description' column to provide more detail about your costs.

If your costs are based on calculations, for example staff costs, please insert a breakdown of this information.

If you are able to claim back the VAT, you should not include it as a project cost.

### **The difference between development and delivery phase costs**

#### **Development phase**

We expect your development-phase costs to be detailed.

Your delivery-phase costs should be based on your best estimated.

#### **Delivery phase**

We expect you to provide detailed costs for your delivery phase.

Your deliver-phase costs may have changed as a result of detailed planning and survey work completed during your development phase.

### **Table columns**

#### ***Cost heading***

Please choose the appropriate cost heading from the list provided. We will ask you to report expenditure against these headings throughout your project.

#### ***Description***

Please add a general description and include more detail in your separate spreadsheet. There is a word limit of 30 words per description.

#### ***Cost***

Please insert your costs in this column – without VAT and contingency (money to be used only for unexpected extra costs).

#### ***VAT (Value Added Tax)***

Make sure that you only 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.

If your VAT status changes so you can reclaim more than you expected, you will need to return this to us. We will consider authorising the use of contingency if you underestimate VAT, but we cannot guarantee that this will be approved. It is therefore important to include the correct amount of VAT when applying to us.

You should make sure that all quotes you get clearly show whether VAT is included or not.

### **Table rows (cost headings)**

For any costs that are not covered by the cost headings listed please use the 'Other' heading. Please use the 'Description' column to provide more detail about your costs. If your costs are based on calculations, for example staff costs, please provide this information.

### ***Professional fees***

Fees should be in line with professional guidelines for example those of RIBA and should be based on a clear written specification.

In your separate spreadsheet, you must use a separate line for each consultant.

### ***New staff costs***

Include costs of new fixed-term contracts, secondments (people who are 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. In your separate spreadsheet, you must use a separate line for each new member of staff.

**You must also openly advertise any new staff posts proposed within your application, with the following exceptions:**

- you have a suitably qualified member of staff on your payroll that you are moving into a project post. (You still need to provide a job description for this post).
- 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 a voluntary organisation and are including a proportion of a staff time in your Full Cost Recovery calculation.

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

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

***Recruitment***

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

***Other***

Include all other costs your know about at this stage.

***Full cost recovery***

You can find more information about Full Cost Recovery on our [website](#).

***Contingency***

This cost heading is mandatory. A contingency is only used to pay for unexpected costs required to deliver your project. You should carefully consider contingency costs within your application and these should be proportionate to the level of risk. A higher level of contingency may be required if you have identified high level risks associated with project delivery or you have a particularly complex project. This could include costs associated with adapting the delivery of your project (for example, from in person to virtual). Make sure that you only include your required contingency here and not distributed across the other cost headings in the application.

The calculation of your required contingency should reflect:

- the degree of certainty with which you have arrived at your project's cost estimates;
- the stage of design or development work completed;
- the project timetable and any restrictions such as immovable deadlines associated with it; and
- the risks in relation to the type of project you are carrying out.

We normally expect a larger contingency at the development phase than at the delivery phase because the project risks should reduce as you develop your project.

The level of appropriate contingency to include can be calculated:

As an overall percentage of your estimated project cost and benchmarked against recently completed projects of a similar type to ensure it is appropriate or;

As different contingency percentages applied to each major cost element of your project (for example, design development, planning and approvals, construction if relevant) reflecting the differing risks and progress made against these aspects of your project.

We will only agree to you using the contingency if you can demonstrate that it is a planned mitigation measure against an identified risk or issue for the project, or it is required to address an unexpected need within your project that if left unaddressed will affect the scope, purpose or timescales to deliver your project.

### ***Non-cash contribution***

This is anything you need for your project that you do not have to pay for (for example, room hire or equipment). We can only accept non-cash contributions if they are direct project costs that could have been part of your project budget.

Non-cash contributions must be included in both the cost and income section of your application form. This is because recognise the value of these costs and your contribution.

Volunteer time: this is the time that volunteers give to support the delivery of your project. This could include administrative work, clearing a site or working as a steward at an event. You should not include costs for the time of people who will take part in your activities (for example, people who attend a workshop or go on a guided tour).

We use a standard rate to calculate the value of your volunteer time:

- Professional volunteer (for example, accountancy or teaching) – £50 per hour
- Skilled volunteer (for example, leading a guided walk) – £20 per hour
- Volunteer (for example, clearing a site or acting as a steward at an event) – £10 per hour

Volunteer time must be included in both the cost and income section of your application form. This is because we recognise the value of this time and your contribution.

## **6b. Development-phase income**

Tell us about any project income from other sources of funding that you expect to receive to help you carry out the project.

Please note: all grant requests are automatically rounded down to the nearest £100. With this in mind, please make sure that the total Development-phase income

exactly matches the total of your Development-phase costs or the system will not allow you to proceed.

**Info icon:** Please use the 'Description' column to provide more detail about the source of funding.

### **There is a limit of 30 words per description**

#### **Secured:**

By secured we mean:

- Cash in your bank reserved specifically for this project
- Formally offered grant money

#### **Cash**

We accept cash funding from any public, charitable or private source, including European programmes.

- You can use funding from another Lottery distributor to contribute towards your project as partnership funding. However, this can't count towards your minimum contribution of 5% or 10%, which must be made up of contributions from your own or other sources, not including the National Lottery.
- You do not have to have all the contributions in place when you apply to us. However, you must have them by the time you are ready to apply for permission to start.
- We will assess whether your partnership funding expectations are realistic.

### **6c. Development-phase financial summary**

The grant % is calculated based on the level of project income from other sources of funding.

Please note: the exact percentage will be calculated.

### **6d. Delivery-phase capital costs**

This includes any capital work to heritage assets, as well as interpretation, and producing digital outputs.

#### ***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.

***New build work***

This only related to new building work (e.g. an extension to a building or work to install an exhibition). If you are a private individual or commercial organisation you cannot include costs here.

***Digital outputs***

Any costs that you require to create or maintain 'digital outputs' for the required time– the things that you create in a digital format which are designed to give access to heritage and/or to 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***

This might include historic costumes, hard hats to give site access, art materials or leaflets and publications.

***Other***

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

***Professional fees relating to any of the above***

This includes any person appointed for a fixed term to help with planning and delivering capital work in your project. This may include a project manager, architects or a quantity surveyor.

**6e. Delivery-phase activity costs**

This includes everything you plan to do in your project that you have not covered in capital costs.

***New staff costs***

For information on new staff posts, please see the help note for question 7a.

***Training for staff***

This includes the cost of all trainers and resources needed to deliver activities to help staff gain new or increased skills.

***Paid training placements***

This includes bursaries or payments to trainees, as well as all resources needed to deliver activities to help trainees gain new or increased skills. For example – accreditation costs, trainers’ fees, equipment and any specialist clothing.

***Training for volunteers***

This includes the cost of all trainers and resources needed to deliver activities to help volunteers gain new or increased skills.

***Travel for staff***

This may include the cost of travelling to a site or venue. Travel costs by car should be based on 45p a mile.

***Travel and expenses for volunteers***

This may include food, travel and any other expenses to ensure volunteers are not out of pocket. Travel costs by car should be based on 45p a mile.

This also includes the purchase and hire of all vehicles, equipment and materials relating to the activities that your volunteers deliver during your project.

***Equipment and materials***

Examples may include historic costumes, hard hats to give site access, art materials or leaflets and publications. Do not include materials relating to training or volunteers here.

***Other***

Include any other costs such as food for events, learning activities or premises hire. Please give a clear description.

***Professional fees relating to any of the above***

This includes any person appointed for a fixed fee to help with planning and delivering the activities of your project. This may include consultants or artists and storytellers.

**6f. Deliver-phase – other costs**

***Recruitment***

You must recruit any project manager using a brief and an appropriate selection process.

***Publicity and promotion***

We can fund promotional materials that relate directly to your project.

If we give you a grant, you must publicise and acknowledge this so that as many people as possible know about the benefits of Lottery funding for heritage.



You must make sure that you acknowledge the support of the National Lottery and you can find more information about how to do this on our [website](#).

### ***Evaluation***

You must evaluate your project and we recommend you allow a sufficient budget for this process here. Staff in your organisation can do this, or, depending on the scale and how complicated your project is, you may want to employ somebody to help.

**We recommend budgeting for evaluation the following ways. As a minimum:**

- Projects between £250,000 and £1million should allow a budget of between 2% and 7% of their total projects costs and consider using independent external evaluators.
- Projects over £1million should allow a budget of up to 7% of the total project costs and always consider using independent external evaluators. Evaluation budgets for projects over £1m should not be less than £20,000. If evaluation costs at this level are not appropriate for your project, please explain why in the cost heading description.

### ***Other***

Include any other costs. In your separate spreadsheet, please include a clear description.

### ***Full Cost Recovery***

Please read about Full Cost Recovery in the Introduction.

### ***Contingency***

Your contingency may reduce when you apply for your delivery phase as risks should reduce as your project develops.

### ***Inflation***

You should include an allowance for inflation for any items that may increase in cost over the period of your project.

The calculation must be as realistic as possible and relate to your project timetable.

For the construction elements of projects we expect you to use the relevant sector specific indices (for example BCIS) to calculate the inflation allowance as construction sector inflation usually varies from general inflation in the economy. If in doubt please seek guidance from a Quantity Surveyor.

### ***Increase management and maintenance costs (maximum five years)***

In your separate spreadsheet, add separate lines for:

New staff costs per year (name and cost of each post) x number of years (maximum five)

Other increased costs per year x number of years (maximum five)

Increased management and maintenance costs begin when the capital works are complete.

***Non-cash contributions***

For information about non-cash contributions, please see the help notes for question 7a.

***Volunteer time***

Include the time that volunteers will give to helping you deliver your project.

**6g. Delivery-phase income**

Please note that we round all grant requests down to the nearest £100. With this in mind, please make sure that the total Delivery-phase income exactly matches the total of your Deliver-phase costs or the system will not allow you to proceed.

**6h. Delivery-phase financial summary**

**6i. If you have included Full Cost Recovery, how have you worked you the share that relates to your project?**

**Section seven: Your organisation**

In this section of the form we will ask you details about your organisation.

**7a Address of your organisation**

**Info icon:** The address of your organisation will auto populate from the information you provided when creating your account.

**7b Legal status of your organisation**

Please select the option that applies to your organisation.

- Local authority - By local authority we mean an administrative body in local government, for example a local council.
- Other public sector organisation - Select this option if you are not a local authority, but you report to the government (such as a state school or university).
- Registered Charity
- Registered Company or Community Interest Company (CIC)
- Faith based or church organisation

- Community or Voluntary group
- Other

**7c Tell us about your organisation's main purpose and regular activities**

**Info icon:** We ask for this information to help us assess whether the project that you want to undertake is a good fit with your organisation's main purpose and what it aims to achieve.

- Describe the purpose and aims of your organisation
- Describe your organisation's regular activities and explain how they are funded
- Describe the size and staff structure of your organisation, your governing body and your financial situation
- Tell us how many paid staff and volunteers work for your organisation

**How many people does your organisation employ?**

**Tell us how you review the Governance and Senior management arrangements in place for your heritage**

**Info icon: Tell us:**

- When the Trustee and Senior Management skills audit was last undertaken
- When a Governance review was last undertaken
- Have all the recommendations from the review been implemented?

**7d. Are you planning to undertake a governance review to ensure you have the right expertise to deliver and then sustain your project beyond the period of your grant funding? Yes/No**

If yes: when do you intend undertaking this review?

How many board members of Trustees does your organisation have?

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

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

Do you have a financial reserves policy? We may want to see this. Yes/No

**7e Is your organisation any of the following? If so, please provide the information requested**

Registered Charity in England, Scotland, Wales or Northern Ireland – give registration number



Charity recognised by HM Revenue and Customs in Northern Ireland – give reference number

Company or Community Interest Company (CIC) – give registration number

**7f Are you VAT-registered?**

If **Yes**, please provide your VAT number.

**7g Do you consider your organisation's mission and objectives to be:**

If your organisation defines itself and its mission as being led by one of the following, please select the options that apply:

- Black or minority ethnic-led
- Disability-led
- LGBT+-led
- Female-led
- Young people-led

And in Northern Ireland only:

- Mainly led by people from the Catholic communities
- Mainly led by people from the Protestant communities

**7h Details of main contact**

This will auto populate from the information provided at registration

**Info icon:** The person you identify must have official permission from your organisation to be our main contact. We will send all correspondence about this application to this person, at the given email address.

**Is the address of the main contact the same as the address in 7a? Yes/No**

If no: Enter the address of the main contact.

**Info icon:** The daytime telephone number and email address will auto populate from the information you provided when creating your account.

**Tell us about any particular communication needs this contact has**

**For projects based in Wales, which language should we use to communicate with the main contact?**

Select an option:

- English
- Welsh



- Both (bilingual)

**If the main contact is not an authorised signatory for your organisation please include the details of an authorised signatory**

Name

Position

Contact telephone number

**6h Does your organisation use social media? If so, please provide us with some information (for instance, your organisations Twitter handle).**

### **Section seven: Supporting documents**

Below is the list of supporting documents that are relevant to this grant programme. If the supporting document does not relate to the project you are proposing please select not applicable.

Please do not submit any additional documents in addition to those requested below.

Where possible, all documents should be provided in digital format (either as an attachment to this application form or be sent to [application.checks@heritagefund.org.uk](mailto:application.checks@heritagefund.org.uk)).

We must receive all supporting documents, whether they are in digital format or hard copy, by the published application deadline.

You should attach the relevant supporting documents to your application form. We can accept most standard file formats.

When submitting supporting documents, please use the document names above so we can easily identify each document. Not using this format may delay your application.

We will not begin assessing your application until you submit all of the relevant supporting documents.

#### **1. Governing document (e.g. constitution)**

**We do not need to see your governing document if:**

- you are a public organisation (for example, a local authority)

**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)

If you do need to provide a governing document, please make sure your project falls within the aims of your organisation.

## **2. Last three years' accounts and current year's management accounts**

Audited accounts are independently examined and should be signed off annually. We would also like to see your management accounts.

If you are a newly formed organisation and do not have a set of audited accounts, please submit your last three bank statements or a letter from your bank confirming that you have opened an account.

We do not need your accounts if you are a public organisation (for example, a local authority).

## **3. Spreadsheet detailing cost breakdown**

You must submit a detailed breakdown of the costs in your application.

**This document is mandatory for all applicants.**

## **4. Partnership agreements (if applicable)**

If you plan to work with another organisation to carry out your project, it is good practice to have a partnership agreement. This document should outline both partner's roles and responsibilities and should be signed by all parties. If your partner owns the heritage you are working on, we will normally ask them to sign up to the terms of the grant too.

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

## **5. Job descriptions (if applicable)**



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 a project post.

## **6. Briefs for internally or externally commissioned work**

Briefs describe any work you plan to commission during your project. If you are commissioning work (for example, from an artist or an 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 three competitive tenders or quotes, for fees over £50,000 we will expect you to provide proof of the competitive tendering process.

## **7. 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.

## **8. Letters of support (no more than six, if applicable)**

Letters of support are a good way of showing us that other people are interested and committed to your project.

Please submit **no more than six letters of support** from the people involved in your project, rather than general supportive statements. For example, if you are planning to deliver workshops at local youth clubs then a letter of support will show us that they are interested and want to take part.

If possible, letters should be on headed paper and/or signed.

## **9. Calculation of Full Cost Recovery (if applicable)**

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](#).

### **10. Business plan**

We would like to see a copy of your organisation's current business plan. If you do not have a business plan please submit the planning document you work with to manage your heritage. If you are an organisation, that manages multiple sites or are, for example a Local Authority, please submit the planning documents most relevant to the heritage.

### **11. Condition survey**

If your project involves the conservation of heritage you must provide a condition survey or another appropriate document such as a draft or outline Conservation Plan. This document should tell us the current condition of the heritage and the works that are needed to return the heritage to a good condition. For example, if you plan to conserve a local war memorial, you will need to know the current condition and what repair works are needed. The survey or report should also indicate the relative priority of the suggested works i.e. what works are most critical and need to be tackled most urgently.

### **12. Ownership documents**

If you are planning any capital works, or intending to purchase land/buildings/collections, please provide copies of any relevant ownership documents (for example, Land Registry ownership documents, or a leased or heads of terms).

If you do not meet our ownership requirements, please tell us how you plan to address this in your development phase.

## **Delivery phase supporting documents**

### **1. Activity plan or Area action plan**

Mandatory supporting document

## **2. Project timetable**

Applicable to all projects

## **3. Cash flow for the project**

This should be detailed for the first year an outline for consecutive years.

## **4. Income and spending forecasts for five years following completion**

Applicable to all projects

## **5. Project management structure**

This document should outline your project management structure so we know who will make decisions and how you will control change during your project. Applicable to all projects.

## **6. Spreadsheet detailing the cost breakdown**

You must submit a detailed breakdown of the costs in your application.

Applicable to all projects.

## **7. Calculation of Full Cost Recovery (if applicable)**

This calculation should be updated based on work in your development phase. You can find a spreadsheet to help you calculate this figure on our website.

Briefs for internally and externally commissioned work.

Briefs describe any work you plan to commission in your delivery phase.

## **8. Briefs for internally or externally commissioned work**

Briefs describe any work you plan to commission during your project. If you are commissioning work (for example, from an artist or an 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 three competitive tenders or quotes, for fees over £50,000 we will expect you to provide proof of the competitive tendering process.

## **9. Job descriptions**



If you plan to recruit a new member of staff in your delivery phase, please submit a job description for that post.

### **10. Business plan**

We would like to see a refreshed business plan for your organisation which incorporates the project you are applying to undertake. If you are an organisation which manages multiple sites or are, for example a Local Authority, please revised the planning documents most relevant to the heritage you are seeking funding for to include the project activity.

### **11. 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.

### **12. Flow chart summarising decision-making for 3<sup>rd</sup> party grants (if applicable)**

### **13. Ownership documents (if applicable)**

If you are planning any capital works, please provide copies of any relevant ownership documents (for example a deed, lease or heads of terms).

### **Management and Maintenance (if applicable)**

### **Design specification (if applicable)**

### **Interpretation plan (if applicable)**

### **Fully developed conservation plan (if applicable)**

## **Section eight: Additional information and declaration**

This part of the form aims to collect the information we need to report on the range of organisations we fund.

An objective for our work is that by 2024 heritage will be more inclusive. We are committed to having an accurate picture of the diversity of organisations who apply to us.



We will anonymise the demographic data you give us and use it to inform our policy and in our public reporting.

Please include all the information that you have available (that is obtained through formal monitoring, not based on assumptions or informal knowledge). Please do not provide data if you are not sure.

When you submit your online form, you will be asked to confirm that you have read, understood and agree with the statements set out in the declaration.