



National Lottery Grants for Heritage £10,000 to £100,000 Resilience and inclusion project funding

Application questions and help notes

Introduction

This application guide is for organisations applying to the National Lottery Grants for Heritage. You must use this guide to assist you in completing the online application form for grants from £10,000 - £100,000.

Important: The National Lottery Heritage Fund uses the same forms across a variety of programmes we administer. When completing your application form you must follow this guidance as some questions need to be answered differently to address the specific criteria for this funding. Additional prompts have been added under some questions in this documents to help guide you. You **should not** use the help icons embedded in the online form as they do not relate to this funding.

The overall word limit of this form is **6,000 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 submitting and make changes where necessary to ensure you do not exceed the stated word count limit.

For technical support or assistance with accessibility, please contact our customer service team by email: enquire@heritagefund.org.uk. You can also find contact details for [your local National Lottery Heritage Fund office](#) on our website.

How to start a new application form

1. Register as a New User on The National Lottery Heritage Fund grants portal or sign into The National Lottery Heritage Fund grants portal using your existing account.
2. Click “Add Project” on the main screen.
3. Click Grants from “£10,000 to £250,000”, in New Project section. Note: you must select this form, but you can only request up to £100,000.
4. Click “Start Full Application”.
5. Grant Request screen: add the value of your grant (Your grant will be automatically rounded down to the nearest £100.)



6. Click OK

Please note, if you are already registered on our portal, you may receive an error message. Proceed to log in or click forgotten password to resolve this.

Section one: Your project

Project Title. This field is mandatory

Your title must use the following format NL20 and then add your project title. For examples, NL20: Saving the heritage of Newtown for the future.

If you do not use this title format we will not know that you are applying for this first phase of our open programmes.

1a Have you received any advice from us before making your application?

If yes: Tell us who you received advice from.

1b Is this your organisation's first application to us?

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

1c Describe your project

Please provide a summary of what this funding will achieve for your organisation and the difference it will make to your recovery in the medium term, between March 2021 and March 2022. Please ensure that your project proposal addresses the resilience and inclusion priorities for this fund (more information below).

This question is limited to **500 words** and is the only part of your application form that is seen by decision takers. This is presented alongside our officer's assessment of your application. Use this space to provide the key summary points about your project. If it is required you can also include further information in **the additional supporting document: Additional Project Description**. Please note this additional text should be limited to one-side A4 page. We strongly advise that you use this opportunity to provide assessors with more detail about your project so that they can fully understand how you will address the outcomes for this phase of funding. This is not mandatory for you to submit if you feel you have provided enough detail within the application form.

You must also submit a project plan as part of your application. We recommend that you use the [template provided](#). We recommend that your project plan is in chronological order. This is where you tell us about the things that your project will do and produce. Tell us what your project outputs will be and include numbers where you can.



When filled in, the table should give you and your colleagues a realistic plan for carrying out your project. However, we understand that the plan is likely to change and improve as your project develops.

Please use these prompts to structure your response.

Resilience

- Tell us how Covid-19 has impacted your organisation, heritage and community, and what needs and opportunities your project will address. You should refer to the essential criteria outlined in the application guidance on our website.
- Tell us how you plan to develop new, creative, and more resilient ways of operating. This could include reviewing existing business models and plans, developing new approaches to reopening to the public during social distancing, and adapting to new ways of working.
- Tell us about difficult decisions you may have to make such as temporarily scaling back your services. This could include digitising material and putting it online, temporary storage for important heritage assets, equipment to allow staff to work from home or mothballing operations.
- Tell us what actions your organisation has already taken to increase its resilience e.g. any changes you've made to save money such as furloughed staff.
- Tell us what would happen to your heritage if you were no longer able to operate viably e.g. who would look after your heritage, if a heritage skill or service would be lost, any estimates of costs to transfer to protect the heritage.
- Tell us how this project will help you to engage a wider range of people with heritage in future.

Inclusion

- Tell us about your proposed participatory heritage activity.
- Tell us about your existing audiences and how you have engaged with under-represented and disadvantaged groups. Explain why it is important that they can continue to be involved with and benefit from the heritage you manage.

1d Where will your project take place?

Please include your organisation's address.



1e When are you planning to start and finish your project?

Enter project start date and finish date.

Your project must not start before we have assessed it and we have given you permission to start your project. If successful, we will expect your project to start within three months of decision. Please note that your project must take no longer than five years to complete. The project finish date should factor in time to submit your completion report and evaluation report.

1f Why does your project need to happen now?

Tell us how Covid-19 has impacted your organisation, and what needs and opportunities your project will address. You should refer to the essential criteria outlined in the application guidance.

Please use these prompts to structure your response.

Resilience

- Tell us how Covid-19 has impacted your organisation, heritage and community
- Tell us about any urgently needed activity that will help support organisations and communities begin to recover and adapt to the continuing Covid-19 crisis

Inclusion

- Tell us how your funded activity will deliver on our inclusion outcome
- Tell us how you propose to lead or engage diverse groups through inclusion focused activity
- Tell us why this is the most appropriate approach for your organisation to take at this time

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

Use this section to tell us about other emergency funding you have applied for. This could be from our Heritage Emergency Fund or the cultural recovery and emergency funds funded by the UK, Scotland, Wales and Northern Ireland governments.

Tell us who you applied to, when, what the funding was for, and if you were successful or unsuccessful. If unsuccessful, please provide the reason why if known.

As outlined in our application guidance, we will prioritise applications from organisations that have not received other emergency funding.



If your proposed activities could be supported through current recovery funds being offered by the UK and Devolved Governments, we will expect you to apply to those funds and you will be a low priority for this funding.

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

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.

Please use these prompts to structure your response.

- Tell us about your existing audiences and how you have engaged with under-represented and disadvantaged groups. Explain why it is important that they can continue to be involved with and benefit from the heritage you manage.
- Tell us which groups of people will benefit the most from your project
- Tell us how your project has supported an increase in engaging these groups with heritage.
- Provide an estimate of the number of participants that will be involved in your project.

1i Does your project involve heritage that attracts visitors?

If yes:

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

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

1j Tell us what will happen after your project ends

Use this section to tell us about how you will manage your heritage in the future and tell us how you will meet any additional running costs.

Please use these prompts to structure your response

- Tell us how you plan to continue and build on the organisational resilience outcome.
- Tell us how you plan to continue involving under-represented people in your organisational activities after your project ends.
- Tell us what you will do to make sure that your organisation is financially viable once this grant is complete.



If your project will create anything in a digital format, please read the digital outputs section of the programme application guidance.

You should also read our standard terms of grant for further information before submitting your application.

Think about: Where the things you will produce will go after your project has finished, how the outcomes will be maintained and how you will manage your heritage in the future.

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

Put N/A

Section two: The heritage

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

- Provide a description of the heritage as it is today.
- If your project is about heritage that is not physical (such as memories or cultural traditions), tell us about the subject and the time period it covers.
- If your core work is not managing heritage, but you use heritage regularly in your organisational activities, tell us about some work you have done in the last 12 months that involved people in heritage activity
- Tell us who the heritage is important to. This could include the local community and/or experts.

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

Select one option from list:

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

Please note you can only select one option.

**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?

If yes, explain why you consider the heritage to be at risk and how. Please consider your evidence base.

Heritage at risk includes:

- heritage that is likely to be lost, damaged or forgotten.
- heritage that is designated as 'at risk'.
- physical heritage sites that are decaying or neglected.
- heritage at risk due to financial difficulty.
- intangible heritage and cultural practices that might be lost.

2d Does the heritage have any formal designation?

Please select any options that apply from the list.

2e Will you be undertaking any capital work as part of your project?

Put N/A

Capital work is not eligible under this fund.

2f If you are undertaking any capital work (including repair, refurbishment etc.) to land, buildings or heritage items, tell us who owns it.

Put N/A

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

Put N/A



Section three: Managing your project

3a Will your project be delivered by a partnership?

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. This document should outline both partner's roles and responsibilities and should be signed by all parties. You can find an example of a partnership agreement on our website.

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.

3b How will your project be managed?

Tell us who will manage your project, the experience of the people involved in your project and what roles they will have.

We also want to know how you will manage the work needed to make your organisation more sustainable in the future.

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

Provide details 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 part-time positions.

Please use these prompts to structure your response

- You should include information on how support from our funding will retain jobs in the sector.
- You should include the number of FTE jobs created or retained through the support, and how many of these are for young people (aged 16-24)
- You should include any apprenticeships or training schemes created, including target number of participants.
- You should include information on any paid training placements, particularly for people at increased risk of being adversely affected by the economic challenges brought about by Covid-19 (i.e. young people).

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 your project as a supporting document to your application.

3d Tell us about any problems your project could encounter and how you will manage these.

We want you to be realistic about the problems your project may face so that you are in a good position to manage them. You should consider what mitigations are possible to help you adapt to the changing situation. These problems could be:

- technical – for example, issues with IT and systems;
- 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 problems you identify will affect the amount you allocate to contingency in Section five: Project costs.

3e What measures will you take to increase positive environmental impacts and reduce negative environmental impacts?

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.

We provide guidance on environmental sustainability on our [website](#).

3f How will you evaluate your project?

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 and generate insight that enables learning and improvement. This should be continuous throughout your project. At the end of your project you will be required to submit an



evaluation of your project along with your final completion report. We provide guidance on evaluation on our [website](#).

Section four: Project outcomes

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

Project outcomes are really important to us because we want to support projects that make a difference.

This funding is designed to focus on two of the nine outcomes the mandatory outcome **must be** achieved in all projects:

- **The funded organisation will be more resilient**
- **A wider range of people will be involved in heritage (mandatory)**

Further prompts have been added below for each outcome. We expect responses to be proportionate to the amount of funding being requested.

Please **do not** respond to the other outcomes on the form as they do not relate to this funding and will not be assessed.

Select the following mandatory outcome and explain how you will achieve it:

Outcome 1: The funded organisation will be more resilient

Your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future. To achieve this outcome, you will need to outline how your heritage project will help your organisation to begin to recover and adapt to the continuing Covid-19 crisis, particularly in places worst affected by Covid-19. This work could include reviewing existing business models and plans, developing new approaches to opening to the public during social distancing, and developing new ways of working.

Please use these prompts to structure your response

- Tell us how you plan to develop new, creative, and more resilient ways of operating.
- Tell us how you will stabilise your organisation in the medium term to make sure the heritage you care for is not put further at risk by Covid-19
- Tell us how you will adapt and recover from the impacts of Covid-19. This could include new business and operational plans, overheads or training and skills development costs.



- Tell us about difficult decisions you may have to make such as temporarily scaling back your services. This could include digitising material and putting it online, temporary storage for important heritage assets, equipment to allow staff to work from home or mothballing operations.

What this outcome means

If your project is a success, your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future. People will continue to be able to engage with heritage because of your continued existence and more secure future.

Outcome 2: A wider range of people will be involved in heritage

To achieve this outcome for this fund, you will need to outline how you meet our mandatory inclusion outcome through your funded activity and/or delivery of a inclusion focused activity led by or engaging diverse groups typically under-represented in heritage (young people, minority ethnic, LGBT+ communities, disabled people and people from lower socio-economic backgrounds).

Please use these prompts to structure your response:

- Tell us about the inclusion focused activity you are proposing, who it is led by and who are the key audiences.
- Tell us about your existing audiences and how you have engaged with under-represented and disadvantaged groups. Explain why it is important that they can continue to be involved with and benefit from the heritage you manage.
- Tell us which of the following under-represented groups are going to be involved in your activity or organisation: Minority ethnic people, young people 11-25, people from LGBT+ communities, disabled people (and people from lower socio-economic backgrounds).
- Have you worked with the above groups before, if so, tell us about this work.
- If your activities do not involve any of the above groups, tell us which groups you will be working with, and how they meet the criteria of under-representation. There may be groups that are local to your organisation that are not getting involved in heritage but would like to be.
- Tell us how support will change the way you work and how you engage with staff, audiences, participants, volunteers and users. For example, you may improve the accessibility of your operations, site or digital material; or you may establish new ways of keeping these groups involved in your work in the longer term.



- Tell us what actions you will take to ensure your work contributes to equality and inclusion and how you will ensure you are involving a wider range of people in your plans ahead, for example, a broader range of ages, ethnicities and social backgrounds, more disabled people, or groups who have never engaged with your heritage before.
- If you are working with under-represented people for the first time, or in new ways, tell us how your activities will change the way you engage with them, or operate as an organisation.

What this outcome means

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

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.

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. Your budget should be realistic and based on some research, quotes or previous experience. Please review the application guidance for eligible cost examples.

Project costs are really important to us. They help us understand how you plan to put your project into action. You need to complete this section of the form in detail.

It is important that the costs you ask us to cover do not constitute unlawful State Aid to you. You will be asked to make a declaration that you have considered and checked the rules on State Aid when you submit your application, and to flag any possible issues.

For any costs that are not covered by the cost headings listed please use the 'Other' heading. Please refer to the Application Guidance for more information on State Aid.

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.

Please note the following:

- if you are able to claim back the VAT do not include it as a project cost.



- round your grant request up to the nearest £100.
- ensure the total costs must match the income.

3a Project costs

In this section of the form we want you to tell us how much it will cost to deliver your project.

Enter the values of your project costs. Costs can be estimates. This information helps us to monitor your project.

Table columns

Cost heading

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

Description

Please add a general description. 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.

Table rows (cost headings)

New staff costs

Include costs of permanent contracts, fixed-term contracts, secondments (people who are temporarily transferred to your organisation) and the costs of freelance staff working for your organisation. Do not include the costs of paying trainees here. We expect the National Living Wage to be reflected in any staff costs.

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 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.

Professional fees

Fees should be in line with professional guidelines for example those of RIBA 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

Leave blank. Acquisition costs are not eligible under this fund.

Repair and conservation work

Leave blank. Repair, conservation and maintenance costs are not eligible under this fund.

New build work

Leave blank. New build costs are not eligible under this fund.

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.

We require projects to ensure their digital outputs are kept up to date and accessible for at least five years after the project end date, so you may need to include reasonable costs for materials to be hosted in your budget.

Equipment and materials, including learning materials

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



Training for staff and volunteers

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

Travel for staff and volunteers

For example, 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 should include the costs of expenses for staff and volunteers to make sure they are not out of pocket.

Event costs

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

Community grants

Leave blank. Community grants are not eligible under this fund.

Other

Please use 'other' for any costs that do not fit within the given 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.

You must make sure that you acknowledge the support of the National Lottery as set out in *How to Acknowledge Your Grant* pages of the website.

Evaluation

This cost heading is mandatory. All projects must be evaluated. 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 and insight that enables learning and improvement. The following questions might be a useful starter to consider:

- Are we making a difference?
- How can we improve?
- Are we reaching the right people?
- How does our project lead to change?

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

- Projects under £250,000 should allow a budget of up to 3% of their total costs



Full cost recovery

This must be calculated based on your organisational costs. If you are a private individual you cannot include costs here.

Contingency

This cost heading is mandatory. A contingency is only used to pay for unexpected costs required to deliver your project. This should be reflective of the associated risk in delivering your project.

Inflation

Include any inflation costs here related to goods and services.

Total

The online form will generate your total project costs.

5b Project income

Under this grant programme you do not have to make a cash contribution to the costs of your project. We encourage applicants to contribute to their projects wherever possible.

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

By secured we mean:

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

Please note: All grant requests are automatically rounded down to the nearest £100. With this in mind, please make sure that the total project income exactly matches the total of costs or the system will not allow you to proceed.

5c Non-cash contributions

Tell us about any non-cash contributions that you expect to receive to help you carry out the project.

Non-cash contributions can be 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 for regular meetings or materials being donated by a local building firm.

Please note that here is a limit of 30 words per 'description.'

5d Volunteer contributions

Tell us about any volunteer contribution that you expect to receive to help you carry out the project.



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

This could include administrative work, leading a guided walk, clearing a site or working as a steward at an event.

You can include costs for volunteer training, travel and expenses in section 3a.

You will need to identify from the drop-down menu the skill level required for the volunteer task, the headings are:

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

The value of volunteer contribution will automatically calculate based on the information provided and the skill level selected

Section six: Your organisation

6a Address of your organisation

Automatically filled in. This section is read only.

6b Organisation type

Please select the option that applies to your organisation.

- Registered Company or Community Interest Company (CIC)
- Faith based or church organisation
- Community or Voluntary group
- 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).
- Private owner of heritage e.g. individuals
- Other

6c Tell us about your organisation's main purpose and regular activities

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
- Tell us if you are considered a diverse-led organisation and/or have a particular focus on inclusion
- 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 board members or Trustees your organisation has
- Tell us how many paid staff and volunteers work for your organisation
- How much did your organisation spend in the last financial year?
- How much of your turnover comes from heritage-related activity?
- What percentage is that of your total turnover?
- What level of unrestricted funds is there in your organisation's reserves and how long will these reserves last for?
- Tell us about any significant ongoing resilience issues you have experienced before March 2020

6d 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

6e Are you VAT-registered?

If Yes, please provide your VAT number.

6f Your organisation's mission and objectives

If your organisation defines itself and its mission as being led by one of the following, please select the option that applies.

6g Details of main contact

Name



Automatically filled in. If details are incorrect, please contact our Customer Service team.

Date of birth

Add date of birth. This is mandatory and should be the correct date of birth for the named main contact

Position

Answer as appropriate

Is the address of the main contact the same as the address in 6a?

Answer as appropriate

Daytime phone number, including area code

Automatically filled in

Alternative phone number field

Leave blank

Email address

Automatically filled in

Tell us about any particular communication needs this contact has

Use this answer to tell us if you need certain types of communication, like large print

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

Select an option

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

Answer as appropriate

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

Answer if applicable



Section seven: Supporting documents

You will need to submit the mandatory and relevant supporting documents from this table with your online application. Some of the documents will not apply to your project and the additional information in this table will help you determine if they are relevant.

Everything we need to assess your application is in the application form and the following supporting documents. Please do not submit any extra documents not listed, as we will not use them in assessment.

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

We will not begin assessing your application until you send us all of the relevant supporting documentation:

1. Governing document (e.g. constitution) (mandatory)

We do not need to see your governing document if:

- you are a public organisation (for example, a local authority)
- you are a private owner of heritage

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

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)

2. Accounts (if applicable)

Your most recent audited or accountant verified 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. Project plan (mandatory)

This document is mandatory and all applicants must submit a project plan. We recommend you use the template provided on [our website](#).

4. Additional project description (mandatory)

Additional space for Application Question 1b: Describe your project

Submit an additional word document to expand on **Application Question 1b: Describe your project**. You should use the prompts outlined under this question. Please limit your response to 1-side A4 page only. Any additional text to this will not be considered.

5. 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. This agreement should reflect the needs of your project and you may need to seek independent advice. 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.

6. 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.

7. Briefs for internally or externally commissioned work (if applicable)



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, how much they will cost, and the skills required to deliver them. 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.

8. 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 National Lottery Heritage funded 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](#).

9. Condition Survey

Not required for this funding

10. Images

Not required for this funding

11. Letters of support

Not required for this funding

12. Ownership documents

Not required for this funding

You should attach the relevant supporting documents to your application form online. We can accept most standard file formats. All documents should be provided in digital format. The total size of your attachments should not exceed 20MB. For any documents that are too large, please email them to application.checks@heritagefund.org.uk. You should include your project reference in the email subject line.

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.

- Scroll to end of page
- Tick 'I confirm that I agree with the above statements'
- Enter your Name, Organisation, Position, Date details
- Are you applying on behalf of a partnership? (Complete if applicable)
- Click Submit

We will send you an email to let you know we've received your application.