Application guide and questions: £250k-£5million
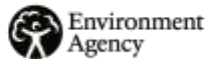
- *You can use this guide to assist you in completing the online application form for grants from £250,000 - £5million from the Green Recovery Challenge Fund.*

- ***Please note:*** *The National Lottery Heritage Fund uses the same forms across the programmes we administer. Some questions need to be answered differently for the Green Recovery Challenge Fund so read this guide to understand what information is required where. You do **not** need to use the help icons embedded in the online form.*

- 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 miss the published programme deadline, have not supplied the correct supporting documents (please do not send more than we ask for) or have not answered all of the questions.

- The personal information we have collected from you will be shared with fraud prevention agencies who will use it to prevent fraud and money-laundering and to verify your identity. If fraud is detected, you could be refused a grant or loan. Further details of how your information will be used by us and these fraud prevention agencies, and your data protection rights, can be found by contacting <u>fair.processing@heritagefund.org.uk.</u>

Section 1: 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.

Enter the name as: GRCF2020: then a short descriptive project title (max 10 words). This field is mandatory.

1a. Is this your organisation's first application to the Fund?

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 provided is the only part of your application form which is seen by decision makers. This is presented alongside our assessment of your application.

Please see the main guidance for further information on the outcomes the Fund is aiming to achieve and some suggested evidence sources.

- Describe what your project will do and which of the three key themes your project will contribute to, and how (your project may meet more than one):
  - Nature conservation and restoration

  - Nature-based solutions, particularly for climate change mitigation and adaption

  - Connecting people with nature

- State how many jobs/ traineeships this will involve, and whether these jobs are being created or retained within your organisation as a result of this project.

- Highlight what outstanding planning or design work you will need to do to start your project (including obtaining any required licenses or consents) or confirm that you are ready for an immediate start.

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

- The application form asks you for the O/S grid reference for your project. To provide this, please give a 6 digit O/S reference number that corresponds to a central location for your site. This should be in the standard O/S format of two letters, followed by 6 digits. E.g. SZ644874.
- Please provide only the grid reference in this field, without spaces, or any other text.
- There is just one field available in our form, but we appreciate that many projects will work across multiple sites. If that's the case and you need to provide more than one grid reference, please do this in the same field and separate each reference with a semicolon. For example, a project that is working on two sites in Dorset and one in Bembridge would enter the following:
- SZ644874; SZ035859; SU128065

  o There is no limit to the number of references you can add to this field, but the Fund only requires one for each site where you are working. If your application is successful, the evaluation team will work with you to capture data on the extent of land that will benefit from your project.

1d. Explain what need and opportunity your project will address.

- Tell us about the need for your project in relation to the relevant fund theme(s), and summarise any evidence you have to support this.

- Tell us about how delivering this project will enable you to create jobs (within your own organisation and/or your suppliers) and/or retain jobs that might otherwise be lost.

- Describe how your project links with plans and strategies (for example Green Infrastructure Plans, National Park Authority management plans, AONB management plans, woodland management plans, conservation plans or new initiatives like Local Nature Recovery Strategy pilots).

- Does your project maintain and build local delivery arrangements?

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

- Please explain why this project cannot go ahead at present without public sector support.

- Tell us what will happen to your environment/ habitats if this project does not go ahead now.

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

- Tell us what consultation and survey work you have done, including any consultation you have done with your local community and those who will be involved in your project. Tell us how this has shaped your project proposals.

- Include advice taken to date from relevant Arm's Length Bodies such as Natural England, Environment Agency, Forestry Commission, Marine Maritime Organisation. If involved, tell us how their advice has helped to shape this application.

- If your project is working on land owned by others, tell us what input landowners have had to date and whether you have signed third party landowner agreements in place.

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

- Include details of audiences for public activity here, including target numbers and

demographics of the people who will benefit. Tell us if these are new or existing audiences, and describe how your project has been designed to support engagement of these groups. Where necessary, refer us to your project plan.

- <u>Do not use</u> this section to describe your proposals for jobs, training and skills development here – use section 3c for this.

1h. Does your project involve heritage that attracts visitors?

Yes/No

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?

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 nine.

Please note if you are planning on working with another organisation to carry out your project, you must submit your partnership agreement as a supporting document.

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

Tell us how you have assessed the possible positive and negative impacts of your project on the environment as a whole, and how you will increase and reduce these respectively.

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

1k. As well as acknowledging your grant as set out in our requirements, we expect you to provide special access and/or offers for National Lottery players, on at least an annual basis. Please tell us how you would do this.

N/A

Section 2: The heritage

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

Please see main guidance for further information for examples of the types of projects we are looking to fund.

- What is important/significant about the natural environment your project is focused on

(e.g. protected landscape, designated sites, priority habitats, value to local people).

- What is the current physical state of your natural environment and what improvements do you foresee as a result of this project.

2b. Select the type of heritage that best describes your project:

Please select Landscapes and Nature and then one of the following:

- Public Parks
- Cemetery
- Pay-to-enter parks and gardens
- Semi-natural and natural landscapes, habitats and species
- Marine
- Geodiversity

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. Please consider your evidence base.

2d. Does the heritage have any formal designation?

Please select the options that apply from the list.
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), landscapes or habitat(s);
- If any Statutory Permissions, consents or licenses are required to carry out your project;
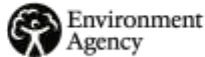- Whether these are in place?

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 option that applies.
- Please read the information in the main guidance about working on private land, third party ownership requirements and buying land.
- Please note works to heritage items such as collections and archives are not eligible under this Fund.
- If you receive a grant, you will be asked to provide evidence of ownership by Permission to Start

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

Yes/No

If yes:

Please provide details.

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

Yes/No

If yes, note that you will need to submit additional supporting documents. See main guidance section on buying land for details.

Please note acquisition of heritage items such as collections and archives are not eligible under this Fund

Section 3: Managing your project

3a. Has your organisation taken on a project of this scale in the last 5 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 be the impact on your organisation if the project does not go ahead?

If you are involved in more than one application to the Green Recovery Challenge Fund, please supply the reference numbers of the other applications and tell us which project is most critical to your organisation at this time? How would you deliver more than one project if successful?

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

Answer as appropriate.

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

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

- You should include information on how your project will create and retain jobs in the sector. This includes:

1. the number of Full Time Equivalent (FTE) jobs created or retained by the project, and how many of these are for young people (aged 16-24)

2. any apprenticeships or training schemes created, including target number of participants

3. employment and/or opportunities for under-represented groups to access nature.

- 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 you will manage the work they are currently doing, or if this is coming to an end.

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

Answer as appropriate.

Provide information about the team that will work on the project, outlining the specific roles, including the person who will take overall responsibility.

Explain the roles and responsibilities of partners.

Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure.

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

Leave blank and complete the project plan in detail.

3k. How do you plan to cash flow the delivery phase of your project?

25% or £250,000 (whichever is the lower) of your grant will be paid upfront. Thereafter grant payments will be made quarterly in arrears. You therefore need to ensure you are able to successfully cash flow the expenditure of your project. Please let us know if you anticipate this will cause undue cash flow pressure at any point.

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

List the key milestones in your project and tell us when they will take place. We will use this table to help us monitor your progress if you receive a grant.

3m. Tell us about the risks to the delivery phase of your project and how they will be managed.
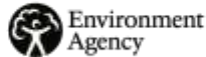
Use the table to tell us what the risks are for your project and how you will mitigate them. We want you to be realistic about the risks your project may face so you are in a good position to manage them. These risks could be:

Environmental – e.g. seasonal restrictions to planned works

Economic – e.g. an unexpected rise in the cost of materials or a disruption to the supply chain

Technical – e.g. if you do not already have all consents and licences in place for your project

Organisational – e.g. a shortage of people with the skills you need

Social – e.g. if further coronavirus restrictions limit public activity or volunteering

If you are taking an innovative approach, please tell us how will you mitigate any risks associated with this?

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

- Enter project start date and finish date. Your project should start date should not be before December 2020 and the finish date should be before 31 March 2022.

3o. Are there any fixed deadlines or key milestones that will restrict your project's timetable?

Yes/No

*If Yes p*lease provide details

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

Section 4: Project outcomes

4. Select the outcomes your project will achieve and explain how you will do this:

Please see the main guidance for further information and examples of the types of projects we are we are interested in supporting for the Green Recovery Challenge Fund. It also contains information on the outcomes this Fund is aiming to achieve, some suggested evidence sources and examples of output measures.

Select the Heritage Fund outcomes your project will seek to achieve. Select all of the options that are relevant to your project.

You must also select 'a wider range of people will be involved in heritage' in order to submit the form. If it is not relevant to your project, put N/A.

For each outcome selected, explain:

1. what outputs your project will deliver

2. the anticipated impact,

3. and how these will achieve the outcome

Include also:

- what qualitative and quantitative evidence bases you have to support your proposed approach (e.g. ecological surveys, condition assessments, audience consultations).

- How do you know that this approach provides a cost-effective way of delivering the outcome? (e.g. reference to relevant standards, conservation evidence, pilot projects etc).

For projects meeting the **nature restoration and conservation** theme, use:

b. Heritage will be in better condition.

- This outcome means that projects under this theme will lead to improvements to the physical state of the natural environment, which will be richer in plants and wildlife.

For projects meeting the **nature-based solutions** theme, use:

b. Heritage will be in better condition.

- This outcome means that projects under this theme will lead to improvements to the physical state of the natural environment to support climate change mitigation and/or increase resilience to the effects of climate change and natural disasters.

For projects meeting the **connecting people with nature** theme, use (as applicable):

a. A wider range of people will be involved in heritage.

- This outcome means that a wider range of people will benefit from engagement with the natural environment.

e. People will have learnt about heritage, leading to change in ideas and actions.

- This outcome means that individuals will have developed their understanding of the natural environment, because you've provided them with opportunities to experience it in different ways that meet their needs and interests.

f. people will have greater well-being.

- This outcome means that people will gain well-being benefits from accessing the natural environment, and may feel more connected to the place where they live.

To explain the economic outcomes from your project, use (as applicable):

i. The local economy will be boosted.

- This outcome means that there will be additional income for local businesses due to direct involvement in your project, or indirectly through increased spending in the area or encouraging tourism

d. People will have developed skills.

- This outcome means that people will have gained or retained employment in the

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natural environment sector, and they will have developed skills

To explain how this Fund will assist in your organisation's sustainability and recovery from COVID-19, use:

g. The funded organisation will be more resilient.

- This outcome means that your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future.

You may also choose to use other outcomes if you feel they apply to your project.

Please note:

- If your application is successful you will be expected to report against the outcomes you select.

Section 5: 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?

We recognise that it may not be possible to demonstrate delivery of longer-term outcomes by the end of March 2022. However, we expect you to develop a legacy plan to sustain (and potentially extend) positive impacts of the project. Tell us your current thinking on project legacy as well as how you will develop during your project (you may include costs for developing this thinking during the project).

If appropriate, tell us also about any strategies, policies or management plans that you will use to maintain, sustain and further 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.

Answer as appropriate

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

For this programme, we are interested to know how you plan to retain staff once the project has ended, or alternatively ensure that you do not lose the skills and knowledge gained.
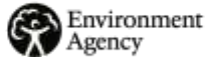

5d. How will you evaluate the success of your project and share the learning?

- Tell us your proposed approach on how you plan to measure progress against your outcomes and outputs by the end of the project.

- Who will have overall responsibility for evaluation?

- How will you baseline your starting point, such as the existing state of the environment/ project feature, from which the project will progress?

- If you are taking an innovative approach, please highlight how you intend to evaluate this and disseminate the findings.

- We provide guidance on how to carry out evaluation of your project on our website.

Section 6: Project costs

In this section, tell us how much it will cost to develop and 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 see main guidance for further information on eligible costs. It is important that the costs you ask us to cover do not constitute unlawful State Aid. 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. You can find more information on State Aid at: https://www.gov.uk/guidance/state-aid.

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

Questions 6a-6c are not applicable.

6d. Delivery- phase capital costs

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

6e. Delivery-phase activity costs.

This includes everything you plan to do in your project that you have not covered in capital, including new staff costs, training for staff and volunteers, paid training placements, equipment and materials, professional fees relating to any of the above.

6f. Delivery-phase – other costs.

This includes costs of recruitment, publicity and promotion, evaluation, Full Cost Recovery, and contingency

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 Delivery-phase costs or the system will not allow you to proceed. You are not required to have any secured partnership funding for this programme.

6h. Delivery-phase financial summary.

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

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Answer as appropriate.

Please see the main guidance for which organisations are eligible to include Full Cost Recovery.

Section 7: Your organisation

7a. Address of your organisation.

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 one of the options.

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

- Answer as appropriate

How many people does your organisation employ?

- Answer as appropriate

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

N/A

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 or Trustees does your organisation have?

- Answer as appropriate

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

- Answer as appropriate

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

- Answer as appropriate

Do you have a financial reserves policy?

Yes/No

7d. Is your organisation any of the following? If so please provide the information requested.

Registered Charity in England – give registration number

7e. Are you VAT-registered?

Yes/ No

If yes please provide your VAT number

7f. Do you consider your organisation's mission and objectives to be:

N/A

7g. Details of main contact

This will auto populate from the information provided at registration.

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.

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.

*Daytime phone number, including area code

Alternative phone number

Email address

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?

- N/A

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

Name

Position

Contact telephone number

7h. Does your organisation use social media? If so, please provide us with some information (for instance, your organisations Twitter handle).

- Answer as appropriate

Section 8: Supporting documents

The following supporting documents must be uploaded with your application form. File sizes should be smaller than 5MB. For any documents over the size limit, email your supporting document to GreenRecoveryChallengeFund@heritagefund.org.uk with your project reference number in the email subject header.

Note that some of the supporting documents required for this Fund are different to those stated in the form – see the main guidance for further details.

- Governing document [mandatory for all environmental charities]

- Detailed cost breakdown [mandatory]

- Project plan [mandatory]

- Draft Partnership agreement [if applicable]

- Consents table [if applicable]

- Calculations of full cost recovery [if applicable]

- State Aid Letter [mandatory]

If your project includes land purchase, we will also need to see:

- a location plan to scale, clearly identifying the extent of the land and any building(s) to be purchased and any relevant access to the land and building

- one independent valuation

- evidence that the current owners are the owners (have legal title) and have the right to both sell the land and/or building and transfer the title to the new owner

- evidence of any legal covenants, or rights (such as fishing, shooting, mineral, drainage), or long- or short-term tenancies, or rights of way or access, or any other interests which are attached to the land or building

We will not assess your application if we do not receive all the required information by the stated deadline.

Section eight: Additional information and declaration

Declaration

a) Terms of Grant

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

By completing this Declaration, you are confirming that your organisation accepts these terms.

Click Submit

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