Application form
Help notes

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Introduction

You can use this guide to assist you in completing the application form for grants from £10,000 to £250,000. 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 this 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 ⓘ 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 **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 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.

⬈ **This icon is shown next to links to further information available online**

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

Please note this will be published on our website and seen by our decision takers.

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

1a. Have you received any advice from us before making your application? Yes/No

If yes: Tell us who you received advice from.

1b. Is this your organisations first application to us? Yes/No

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

1c. Describe 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 decisions takers. This is presented alongside our assessment of your application.

You must also submit a project plan as part of your application.

i Project Plan: This is one of the most important parts of your application and we recommend that you use the template provided.

The template of the project plan can be found on our **website** ↗.

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.

1d. 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.

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

Enter your project start and finish date.

> ⓘ Your project must not start before we have assessed it and we have given you permission to start your project.
>
> **To obtain permission to start you will need to submit a form online and provide us with:**
>
> - your bank account details
> - proof of ownership/leasehold requirements (if relevant)
> - details of statutory permissions required and obtained (if relevant)
> - confirmation of match funding (if relevant)
>
> Please contact your local office if you are unsure of how much time to factor into your timetable for this aspect.
>
> Please note your project must take no more than five years to complete.
>
> The project finish date should factor in the time required to submit your completion report and evaluation report.

1f. Why does your project need to happen now?

> ⓘ Tell us what needs and/or opportunities your project will address and what will happen if you do not receive a grant from us.

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

> ⓘ 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 you received any pre-application advice on planning and/or listed building consent matters.

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

> ⓘ We would like to know more about the range of people that you are planning to attract with your project.
>
> Tell us about any action you will take to overcome barriers to involving people with heritage.
>
> **Tell us:**
>
> - which groups of people will benefit the most from your project
> - 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

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

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.

> ⓘ Tell us about how you will manage your heritage in the future, and tell us how you will meet any additional running costs. Under this programme, you do not need to produce a management and maintenance plan, but you may find it useful to read our Management and maintenance plan guidance, which is available on our **website** ↗.
>
> Tell us how you plan to continue to engage a wider range of people after the project ends.
>
> For projects involving physical works, for example conservation to a historic building or new building work, please read the property ownership section of the programme application guidance.
>
> 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.

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

> ⓘ 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 encourage 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** ↗.

2. The heritage

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

i 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 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 project is about physical heritage (such as a building, ship or nature reserve), give us factual information about the asset, its size, when it dates from, the surviving features, its condition and why it is important to your local area

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

2b. Select the type of heritage 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**

i **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.

i 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 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).

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

> ℹ️ **Capital works**
>
> Capital works are defined as works that create or improve an asset.
>
> By capital work we mean digitization, the conservation of artefacts and objects, repair and conservation works or new build.
>
> For example, conservation of a heathland, repairs to a war memorial and digitisation of a photographic archive would all be considered as capital works.
>
> For projects involving physical works, for example conservation to a historic building or new building work, please read the ownership 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.
>
> All Statutory Permissions and/or Licences must be in place before your project can begin.

If yes, tell us:

- The name of the building(s), collections, landscapes or habitat
- If any Statutory Permissions or Licences 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

> ℹ️ Please read the ownership requirements section of the programme guidance and refer to the receiving a grant guidance.

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? Yes/No

> ℹ️ 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.

3. Managing your project

3a. Will your project be delivered by a partnership? Yes/No

i 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.

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

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.

3b. How will your project be managed?

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

If you are recruiting someone to help manage your project you will need to attach a job description.

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 your project.

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

i 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.

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

i We want you to be realistic about the problems your project may face so that you are in a good position to manage them.

These problems 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
- 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.

Increasing positive examples:

- 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 and 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

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. 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.

4. Project outcomes

We recommend a limit of 150 words for each outcome.

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

Achieving the outcome *'A wider range of people will be involved in heritage'* is a mandatory requirement.

> ⓘ Outcomes are changes, impacts, benefits or any effects that happen as a result of your project.
>
> The number of outcomes you achieve will vary depending on the project type and should be proportionate to the size of grant you are requesting or the specific focus of your project. We expect projects to achieve some outcomes more strongly than others. Although your project may achieve more indirectly, please focus on the outcomes that are strongest, as we will monitor your progress and you will use them in your evaluation.

Please note:

- we do not expect you to achieve all of the outcomes listed;

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

A wider range of people will be involved in heritage

> ⓘ There will be more people engaging with heritage and this audience will be more diverse than before your project. Changes will have come about as a direct result of your project, and particularly your audience development work and community consultation, by collecting and analysing information about the people who engage with your heritage – and those who don't – before, during and after your project.

How will you know what you have achieved?

You will be able to show that your audience profile has changed; for example, it includes people from a wider range of ages, ethnicities and social backgrounds; more disabled people; or groups of people who have never engaged with your heritage before. You will be able to show how more people, and different people, engage with heritage as visitors, participants in activities, or volunteers, both during your project and once it has finished.

Heritage will be in better condition

> ⓘ There will be improvements to the physical state of your heritage. The improvements might be the result of repair, renovation or work to prevent further deterioration, such as mending the roof of a historic building, conserving an archive, clearing field ditches or repairing a ship. Improvements might also result from new work, for example increasing the size of an existing habitat to benefit priority species, or constructing a new building to protect historic ruins, archaeology or vehicles.

How will you know what you have achieved?

The improvements will be recognised through standards used by professional and heritage specialists, and/or by people more generally, for example in surveys of visitors or local residents.

Heritage will be identified and better explained

i There will be clearer explanations and/or new or improved ways to help people make sense of heritage. This might include new displays in a museum; a smartphone app with information about the biodiversity and geodiversity of a landscape; talks or tours in a historic building; an accessible guide to a historic house; or online information about archives.

How will you know what you have achieved?

Visitors and users will tell you that the interpretation and information you provide are high quality, easy-to-use and appropriate for their needs and interests, that they enhance their understanding, and that they improve their experience of heritage.

People will have developed skills

i Individuals will have gained skills relevant to ensuring heritage is better looked after, managed, understood or shared (including, among others, conservation, teaching/training, maintenance, digital and project management skills). Structured training activities could include an informal mentoring programme, on-the-job training or external short courses.

How will you know what you have achieved?

People involved in your project, including staff and volunteers, will be able to demonstrate competence in new, specific skills, and where appropriate, will have gained a formal qualification.

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

i Individuals will have developed their knowledge and understanding of heritage because you have given them opportunities to experience heritage in ways that meet their needs and interests.

How will you know what you have achieved?

Adults, children and young people who took part in the project, or who are visiting your site or engaging with your heritage in other ways e.g. through digital technology, will be able to tell you what they have learnt about heritage and what difference this makes to them and their lives. They will also be able to tell you what they are doing with that knowledge and understanding; for example, sharing it with other people, using it in their professional or social life, or undertaking further study.

People will have greater well-being

i Individuals will feel more connected to the people around them and/or the place where they live as a result of involvement in your project – this is what we mean by greater wellbeing. To achieve this outcome, your project should be designed to impact on wellbeing (and developed with expert organisations if you plan to involve people using mental health services or learning disabled people). You might provide opportunities for people to be more active (for example, volunteering in a park, taking part in community archaeology, sharing digital skills) or to build new connections with others.

How will you know what you have achieved?

You or your external evaluator will use recognised evaluation methods for measuring wellbeing and ask the people involved about how they feel. Participants will report increased happiness, greater satisfaction and/or that life feels more worthwhile as a result of their involvement in your project. Some people might report reduced levels of anxiety.

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. You will achieve this greater resilience through stronger governance and greater local involvement in your organisation; increased management and staff skills; fresh sources of expertise and advice; and working in partnership to share services, staff and resources.

How will you know what you have achieved?

You might have new volunteers who increase your capacity and skills; or new sources of income through commercial activity, endowments or new fundraising programmes. You will be able to show that your organisation is stronger and in a better position for the future as a result of the changes you made as part of your project.

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

ⓘ Local residents will have a better quality of life and overall the area will be more attractive. As a result of improving the appearance of heritage sites or of the opportunities you have provided for local people to visit, use, get involved with, and enjoy heritage, residents will report that they feel greater pride in the local area and/or have a stronger sense of belonging.

How will you know what you have achieved?

Community members will report a greater sense of shared understanding and a better sense of getting on with each other. Visitors to your heritage will also tell you that the area has improved as a direct result of your project and what they value about it.

The local economy will be boosted

ⓘ There will be additional income for existing local businesses and/or there will be new businesses in your local area. You will be able to show that local businesses have benefited from your project. This will be because you spent your grant locally, or because you encouraged more tourism visits to the local area, or because you provided new premises for businesses that moved into the area or expanded their operations within it.

How will you know what you have achieved?

You will be able to show that these changes have come about as a direct result of your project using information about the local economy before and after your project available from organisations such as the local authority or tourism organisation.

5. Project costs

5a. 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.

> ⓘ 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.
>
> **There is a limit of 30 words per description.**
>
> If you are able to claim back the VAT, you should not include it as a project cost. Contingency and Evaluation are mandatory cost headings because our experience shows how important they are when delivering projects.

Before you begin:

- your grant request will be rounded down to the nearest £100

- your total project costs must match your project income

- contingency and Evaluation are mandatory cost headings because our experience shows how important they are when delivering projects. If you choose not to allocate a cost to either heading then you should explain why in question 3a

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 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 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.

You must also openly advertise all project staff posts, 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 backfilling their position.

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

Professional fees

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

Recruitment

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

Purchase price of heritage items

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

Repair and conservation work

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

New build work

This only relates 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 'digital outputs' – 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.

Training for staff and training for volunteers

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

Travel for staff and travel for volunteers

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 can 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

As part of your project, you can ask us to contribute towards a ring-fenced pot of money that you can use to fund other organisations to deliver smaller discrete projects. We call these grants to third parties 'community grants'. Please read the programme guidance to find out more about community grants.

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 and you can find more information about how to do this on our **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. Budget between 2% and 7% of your costs towards evaluation.

Full cost recovery

This must be calculated based on your organisational costs. If you are a private individual or commercial organisation 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. The total contingency figure may be up to **10%** of the total costs of the project, unless you have a particularly complex capital project where a higher level may be required. Make sure that you only include your required contingency here and not included within the other cost headings in the application.

Inflation

You should only include inflation if your project will last for more than one year. It is only used to pay for costs that have increased over the time of the project.

Total

The online form will generate your total project costs.

5b. Project income

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

> *i* **Grants from £10,000 - £100,000:**
>
> At this grant level, we do not require a contribution from you but you should consider whether other funders, organisations or people might be able to support your project. We will assess whether your project offers good value for money and take your contribution into account.
>
> **Grants from £100,000- £250,000:**
>
> You must contribute at least 5% of your project costs. We describe this contribution as `partnership funding' and it can be made up of cash, non-cash contributions, volunteer time or a combination of all of these.

> **Secured**
>
> By secured we mean:
>
> • Cash in your bank reserved specifically for this project;
>
> • Formally offered grant money.
>
> Your request for a grant should be between £10,000 and £250,000, and should be rounded down to the nearest £100.
>
> The grant % is calculated based on the level of project income from other sources of funding.

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.

> *i* 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 contribution

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

> *i* 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.

6. Your organisation

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

6a. Address of your organisation

ⓘ The address of your organisation will autopopulate from the information you provided when creating your account.

6b. Legal status of your organisation

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

☐ Private owner of heritage

☐ Other

ⓘ **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 and commercial organisations.

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

Please select the option that applies to your organisation.

ⓘ 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 board members or 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?

6d. Is your organisation any of the following, if so please provide the information requested

Registered Charity in England, Scotland or Wales – 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. 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 option that applies. ✔

Please select the options that apply:

☐ black or minority ethnic-led

☐ disability-led

☐ LGBT+-led

☐ female-led

☐ young people-led

And in NI only:

☐ mainly led by people from the Catholic communities

☐ mainly led by people from the Protestant communities

6g. Details of main contact

ⓘ 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 this address of the main contact the same as the address in 6a? Yes/No

If no: Enter the address of the main contact

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? ✔

☐ English

☐ Welsh

☐ Both (bilingual)

If the main contact is not an authorised signatory for your organisation

Provide details in text box

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

7. 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 that do not appear below.

All documents should be provided in digital format (either as an attachment to the application form or sent as an email to your local office).

1. Governing document (e.g. constitution)

ⓘ **Our constitution should include:**

- the name and aims of your organisation;

- a statement which 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 suitable person).

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

We do not need to see your governing document if:

- you are a public organisation (e.g. a local authority)

- you are a private owner of heritage

- you are a commercial organisation

2. Accounts

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 3 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 (e.g. a local authority).

3. Project plan

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

4. Partnership agreements

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** ↗, which you may find helpful as a starting point 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 a partnership agreement unless another organisation is delivering a significant part of your project.

5. 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.

6. Job descriptions

If you plan to recruit a new member of staff to help deliver your project, including an apprentice, please submit a job description for that post.

Please note: You must openly advertise all new staff posts, unless you are extending the hours of an existing member of staff or are moving an existing member of staff into the project post.

7. Briefs for internally or externally commissioned work

Briefs describe any work you plan to commission during your project. If you are commissioning work (e.g. from an artist or an architect) then you should submit a brief.

The brief should describe the works, how long they will take, ad how much they will cost. You can find a template brief on our **website** ↗.

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

8. 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.

9. Letters of support

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.

10. Calculations 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** ↗.

> When submitting supporting documents, please use appropriate file names so our assessment team can easily identify each document.
>
> We will confirm we have received your application when we have your online form and all supporting material.
>
> We will not be able to assess your application if we do not receive all the required information.

11. Ownership Documents (if applicable)

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).

8. 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 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.

Contact us

You can find more information about contacting us on our **website.**

If you want to find out about our complaints process, please visit our **website.**

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