

Shared History Fund - Application guide and questions for grants from £3,000 to £10,000

This application guide is for organisations applying to the Shared History Fund. You must use this guide to assist you in completing the online application form for grants between £3,000 and £10,000.

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 for the Shared History Fund. You **should not** use the help icons embedded in the online form as they do not relate to this funding.

Some questions have word limits and you will not be able to submit your application if you exceed these limits. Word limits are indicated in brackets, if necessary please use bullet points. 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.

How to start a new application form

1. Register as a new user on the National Lottery Heritage Fund grants portal or use an existing user account.
2. Click "Add Project" on the main screen.
3. Click Grants from "£3,000 to £10,000", in New Project section.
4. Click "Start Full Application".
5. Grant Request screen: add the value of your grant. Your grant will be automatically rounded to the nearest £100.
6. Click OK.

Section one: Your project

Name of your organisation: this will auto populate from the information you supplied at registration.

Project reference number: this will auto populate from the information created when you added your new project

Project Title. This field is mandatory

Your title must use the following format '**SHF:** and then add your project name'. If you do not use this title format we will not know that you are applying for the Shared History Fund Northern Ireland and your application may be delayed.

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

Answer yes or no.

1b. Describe your project

We will fund projects that encourage engagement with the history of the centenary of Northern Ireland, in line with the Principles for Remembering. Please refer to the Shared History Fund Guidance for further detail on what we can fund. It is important that you respond to all the bullet points below when answering this section.

- what you will do
- who will be involved
- what you will be spending the funding on
- how you will use the Principles for Remembering which are outlined in the guidance
- how you plan to evaluate the project
- how you will share what you have learned with a wide range of people

Please note the summary you provide is the only part of your application form which is seen by decision takers. This is presented alongside our Officer's assessment of your application.

This question has a 500 word limit.

1c. Use the tick box menu to tell us what you will do.

Please select the options that apply.

1d. Where will your project take place?

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

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

Enter the start date and finish date of your project.

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)

Project expenditure MUST be completed by 31 March 2022.

1f. Tell us about the heritage in your project, its current condition and why it is important to your organisation and your community

This question has a 300 word limit.

1g. Select the heritage type that is the main focus of your project:

Please select the category that best represents your work.

1h. Will you be undertaking any capital work as part of your project?

Detail any small-scale physical works such as the erection of plaques or interpretive panels here. If no capital costs are involved write 'n/a'.

If yes, tell us:

- if you own the heritage to be worked on
- if not, whether you have permission from the owner
- if the works will follow conservation good practice
- if the work requires any Statutory Permissions or Licenses
- if the Statutory Permissions or Licenses are in place

1i. What will you do to ensure your project is environmentally friendly?

This question has a 150 word limit. For example.

- tell people how to get to your site or events by public transport (being aware of public health restrictions relating to Covid-19)
- use compostable/biodegradable plates and cutlery for event catering
- use local suppliers
- use recycled and/or environmentally friendly materials
- recycle your waste
- tell people about the environmental measures you have implemented

1j. Tell us what will happen after your project ends?

This question has a 200 word limit. 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. If your project will create anything in a digital format please read the digital outputs section on page 17 of the [programme application guidance](#).

1k. Acknowledging your grant

In the event of an award, we will let you know how you should acknowledge the Shared History Fund in your project, including for the purposes of any branding

Section two: 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.

We have selected three outcomes for the Shared History Fund. As a minimum, all projects must address the mandatory outcome:

- **a wider range of people will be involved in heritage as a result of your project**

In addition to the mandatory outcome, you may decide that your project could meet either one or both of the remaining two outcomes for the Shared History Fund which are:

- **heritage will be better identified and explained**
- **people will have learnt about heritage leading to a change in ideas or actions**

If your application is successful you will need to tell us how your project achieved the outcomes in your end-of-grant reporting.

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

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.

This is where you should outline how your project will incorporate the Principles for Remembering which are:

1. Start from the historical facts
2. Recognise the implications and consequences of what happened
3. Understand that different perceptions and interpretations exist
4. Show how events and activities can deepen understanding of the period.

All to be seen in the context of an inclusive and accepting society.

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 identified and better explained

There will be clearer explanations and/or new or improved ways to help people make sense of heritage. This might include new displays or interpretation panels; a smartphone app; a heritage trail; debates, talks or tours or depositing new research in publicly accessible 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;
- enhance their understanding;
- improve their experience of heritage.

People will have learnt about heritage leading to a change in ideas or actions

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.

Section three: Project costs

- Project costs are really important to us. They help us understand how you plan to put your project into action and assess value for money. You need to complete this section of the form in detail.
- 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 insert a breakdown of the information.
- Please note: third sector organisations will be able to apply for full cost recovery including existing staff time as part of their project costs.
- There is a limit of 30 words per description.

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

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 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).
- 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.

If you are a voluntary organisation and are including a proportion of a staff time in your Full Cost Recovery calculation. This fund can support 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.

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

Third sector organisations will be able to apply for full cost recovery including existing staff time as part of their project costs and this is the section where you should record those costs marking them clearly as full cost recovery in the description.

Professional fees The services of freelance workers should be reflected in this section e.g. a facilitator, artist, digital expert or interpretation consultant.

Recruitment This can include advertisement 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. The acquisition should not be the main focus of your application and the item should be necessary to help you to deliver the project.

Repair and conservation work Costs to repair, restore or conserve heritage items for display purposes.

Event costs Costs for any events (for example, refreshments or room hire). Don't forget that you must demonstrate how public health restrictions relating to Covid-19 may impact on in person events and make a contingency plan. You will need to factor in assumptions about social distancing in line with the regulations in the relevant jurisdiction.

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 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 can include the costs of expenses for staff and volunteers to make sure they are not out of pocket.

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.

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 up to 5% of your costs towards evaluation.

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 that it is not included within the other cost headings in the application.

Total The online form will generate your total project costs.

Costs can be estimates. This information helps us to monitor your project

3b. Grant request

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

Under the Shared History Fund you do not have to make a cash contribution to the costs of your project.

Your request for a grant should be between £3,000 and £10,000, and should be rounded down to the nearest £100.

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.

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

3c. 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 refreshments being donated by a local café.

3d. 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, editing a leaflet 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 four: Your organisation

4a. Address of your organisation

This will auto populate with the information you supplied when creating your account.

4b. Organisation type

Please select the option that applies to your organisation. Please note that for profit organisations cannot apply to the Shared History Fund.

4c. Tell us about your organisation's main purpose and regular activities

Provide a short description of the work of your organisation. This question has a 200 word limit.

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.

- Tell us about your organisation's governance e.g. How many people are on your board or management committee, do they have any skills particularly relevant to this project
- Describe the purpose and aims of your organisation
- Tell us how many paid staff work for you organisation
- Tell us how many volunteers are involved in your organisation
- Describe your organisation's regular activities and explain how they are funded

4d. 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

4e. Your organisation's mission and objectives

If relevant, please select the most appropriate category.

4f. Details of main contact

Name: Automatically filled in based on information supplied when creating your account. If details are incorrect, you can edit the content.

Date of birth: Add date of birth. This is mandatory and is used for our fraud checks. This 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 4a?: Answer as appropriate

Daytime phone number, including area code: Automatically filled in based on the information supplied when creating your account.

Alternative phone number field: Please provide as appropriate.

Email address: Automatically filled in based on the information supplied when creating your account.

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 (50 words max)

For projects based in Wales, which language should we use to communicate with the main contact?: Select the most appropriate option

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

4g. Does your organisation use social media?

If so, please provide us with relevant information such as your Twitter handle or other social media accounts.

Section five: 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 Shared.HistoryFund@heritagefund.org.uk with your project reference number in the email subject header.

The supporting documents for the Shared History Fund are:

1. Governing document

Your 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.

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. 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.

Section six: 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.

- 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?

- Select the most appropriate answer.

Click Submit

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