Application form

This is a reference guide to the full application form and should not be filled in. You will need to apply online.

This application form has seven sections, following your project summary below.

There is a word limit for your application of 6,000 words in total. Word counters throughout the application form will let you know how many words you have written so far and you will be able to save the document as you work on it, no matter how many words you have written. However, please bear in mind that you will not be able to **submit** your application if you go over 6,000 words.

Please note that the way in which the HLF portal counts words slightly differs from other word processing software, e.g. Microsoft Word. For example, if you use dashes in your text, this may be counted as an additional word by the HLF portal counters. If you decide to copy and paste text directly into your online application, please review your application before submission and make changes where necessary to ensure you do not exceed the stated word count limits.

We will confirm we have received your application when we have your application and all supporting material. If you are sending any material in hard copy, this must arrive within five working days, and by the relevant programme deadline, if applicable. We will not assess your application if you miss the published programme deadline, have not provided the correct supporting documents (please do not send more than we ask for) or have not answered all the questions.

Application summary

Name

Project title

In no more than 15 words, please choose a title which you think best describes your project. This will be seen externally, on our website and by our decision takers so please ensure that you choose a title that you are happy for a wide range of people to see.

Project summary

In no more than 200 words, summarise your project. We will use this text to tell people about your project, including our decision takers, who will see your description as part of the assessment process.

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

Yes / No

If yes: Please tell us who you received advice from

Is this your first application to the Heritage Lottery Fund?

Yes / No

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

Section one: Your organisation

1a. Address of your organisation.

Address

Town/City

County

Post code   *We will use this information to autopopulate the local authority and constituency information below.*

1b. Is the address of your project the same as the address in 1a?

Yes / No

If no: Enter the address of your project

Address

Town/City

County

Post code

Local authority within which the project will take place

Constituency within which the project will take place

1c. Details of main contact person.

Name

Position

Is the address of the main contact person the same as the address in 1a?

Yes / No

If no: Enter the address of the main contact person

Address

Town/City

County

Post code

Daytime phone number, including area code

Alternative phone number

Email address

1d. Describe your organisation's main purpose and regular activities.

1e. The legal status of your organisation.

Please select one of the following

Local authority

Other public sector organisation

Organisation not in the public sector

If your organisation is not in the public sector please select one of the following:

Faith-based or church organisation

Community or voluntary group

Private individual

For-profit organisation

Other

If other please specify

For all organisations not in the public sector:

Describe the size and staff structure of your organisation, your governing body and your financial situation.

If applicable, how many board members 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?

For all organisations:

If your organisation is any of the following, please provide the information shown.

Company – give registration number

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

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

1f. 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 ensure that a representative from each has been added to the end of the Declaration in Section six.

1g. Are you VAT-registered?

Yes / No

If yes: Please provide your VAT number

Section two: The heritage

In this section, tell us about the heritage your project focuses on and why it is valued.

2a. What is the heritage your project focuses on?

2b. Is your heritage considered to be at risk?

Yes / No

If yes: Please provide information on why your heritage is considered to be at risk and in what way

2c. Does your project involve work to physical heritage like buildings, collections, landscapes or habitats?

Yes / No

If yes: Tell us the name of the building(s), collections, landscape or habitat area

If yes: Does your organisation have the freehold of the building or land, or own outright the heritage items that your project focuses on?

Yes / No

If no: Does your organisation have a lease of the building or land that your project focuses on?

Yes / No

If yes: How many years are left to run on the lease?

If no: Does a project partner have the freehold of the building or land, or own outright the heritage items that your project focuses on?

Yes / No

If yes: Please give the name of the partner organisation.

If yes: Does a project partner have a lease of the building or land that your project focuses on?

Yes / No

If yes: Please give the name of the partner organisation. How many years are left to run on the lease?

If no: **If you do not currently meet our ownership requirements, tell us the date by when you expect to do so?**

If you have answered Yes to the first part of question 2b, please answer these two additional questions.

Does your organisation have, or are you planning to take out, a mortgage or other loans secured on the building or land, or heritage items?

Yes / No

If yes: **Please give details of the lender and the amount of the mortgage or loan.**

If no: Does a project partner have, or are planning to take out, a mortgage or other loans secured on the building or land, or heritage items?

Yes / No

If yes: Please give the name of the partner organisation. Please give details of the lender and the amount of the mortgage or loan. For landscape projects, please provide an Ordnance Survey grid reference for your landscape.

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

Yes / No

If you have clicked Yes to question 2c or 2d, the online application form will also display tick boxes to help you give us further information about the physical heritage in your project.

Section three: Your project

In this section, tell us about your project. Make sure you include all your planned activities, and capital works if applicable.

3a. Project plan.

You must submit a Project Plan as part of your application; this is where you can provide us with information on what your project will do. Please read the programme application guidance and application form help notes for more information.

You will need to create your own project plan and attach it as a supporting document at the end of this form. A template document can also be found on the HLF website.

3b. Explain what need and opportunity your project will address.

3c. What work and/or consultation have you undertaken to prepare for this project?

3d. What outcomes will your project achieve?

3e. What are the main groups of people that will benefit from your project?

We need to understand the range of audiences that you are planning to attract with your project. We use this information to assess your plans for your project – we do not prioritise projects for any particular group. We also use the information to report on the benefits of our funding and to help decide what action we will take to overcome barriers to involving people with heritage.

In addition to asking you to write about who your project will benefit, we will also collect this information using a table of beneficiary groups. The groups listed in this table are the same as those listed in **Section six: Additional information and declaration.**

3f. How many people will be trained as part of your project, if applicable?

3g. How many volunteers do you expect will contribute personally to your project?

3h. How many full-time equivalent posts will you create to deliver your project?

3i. How are you planning to promote and acknowledge National Lottery players' contribution to your project through HLF funding?

Section four: Managing your project

In this section tell us about how you will deliver your project.

4a. How will your project be managed?

4b. Tell us about any outside advice you have received or will receive to help you manage your project.

4c. When do you expect your project to start and finish?

Project start date: mm/yy   Project finish date: mm/yy

4d. How will you evaluate the success of your project?

4e. Tell us what will happen to things that your project has produced after the funding ends.

4f. If your project involves conservation of an item, land or property, tell us how you will maintain it so that people can continue to experience and enjoy it after the funding ends.

Section five: Project costs

In this section, tell us how much it will cost to deliver your project. There is a limit of 20 words per 'description' section when completing the cost tables. If you need to provide a more detailed explanation and breakdown of your costs there is a facility at the end of the application form to upload supporting documents.

5a. In this section, tell us how much it will cost to deliver your project.

Cost heading	Description	How much (£)	VAT (£) Non recoverable	Total (£)
New staff				
Professional fees				
Recruitment				
HLF - approved Mentor				
Purchase price of heritage items				
Repair and conservation work				
New build work				
Digital outputs				
Equipment and materials				
Training for staff				
Training for volunteers				
Travel for staff				
Travel for volunteers				
Expenses for volunteers				
Cost of producing learning materials				
Other				
Publicity and promotion				
Evaluation				
Full Cost Recovery				
Contingency				
Inflation				
Total				

5b. Project income.

Please note that HLF rounds all grant requests down to the nearest £100. With this in mind, please make sure that the total project income exactly matches the total of your project costs or the system will not allow you to proceed.

Source of funding	Description	Secured?	Value (£)
Cash			
HLF grant request			
Total			

5c. Financial summary.

Total project costs	
Total project income	
HLF grant request	
HLF grant %	

5d. Are there any non-cash contributions or volunteer time to help carry out your project?

Description of non-cash contributions	Estimated value (£)
Total of non-cash contributions	

Description of volunteers' task	Number of days	£ per day (as per our guidance)	Estimated value (£)
Total			

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. We will not use this information to assess your application. We encourage you to be as specific as possible about the people your organisation represents.

If your organisation represents the interests of a particular group, such as young people or disabled people, tell us which by filling in the tables below.

If you are based in Northern Ireland, where legislation requires us to report in detail on the organisations we fund, please complete the tables in full, as applicable.

If you are based outside Northern Ireland and your organisation represents the interests of a wide range of people and not any particular group, mark this box only ☐

Ethnic group

Asian	Black	Chinese	Mixed	White
Asian British	Black British	Chinese British	White and Black Caribbean	White British
Asian English	Black English	Chinese English	White and Black African	White English
Asian Irish	Black Irish	Chinese Irish	White and Asian	White Irish
Asian Northern Irish	Black Northern Irish	Chinese Northern Irish	Other	White Northern Irish
Asian Scottish	Black Scottish	Chinese Scottish		White Scottish
Asian Welsh	Black Welsh	Chinese Welsh		White Welsh
Bangladeshi	Caribbean	Other		Other
Indian	African		Arab	
Pakistani	Other			
Other				

Irish travellers (Northern Ireland only)

Age

under 16	16 to 25	26 to 49	50 to 64	65 and over

Disabled people

Disabled people

Marital or civil-partnership status

Single people (never married or in a civil partnership)	Married people (and living with their husband or wife)	Married people (and separated from their husband or wife)
Divorced people	Widowed people	In a civil partnership
Separated but still legally in a civil partnership	Formerly in a civil partnership which is now legally dissolved	Surviving partner from a civil partnership

People with dependants

People with dependants (for example, children or elderly relatives)

People in lower socio-economic groups

People living in households with incomes below the national average, or people living in the most deprived local-authority wards in England, Scotland, Wales or Northern Ireland

Community background (Northern Ireland only)

Mainly Protestant (more than 60%)	Mainly Catholic (more than 60%)
Both Catholic and Protestant	Neither Catholic nor Protestant

Religious belief

Protestant	Muslim	Catholic	Jewish	Sikh
Buddhist	Hindu	Other	Other Christian	No religious belief

Gender

Males	Females	Transgender people

Sexual orientation

Gay and lesbian people	Heterosexual people	Bisexual people

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. For partnership projects, all partners must confirm that they accept the standard terms of grant by adding a contact at the end of the declaration.

b) Freedom of Information and Data Protection
We are committed to being as open as possible. This includes being clear about how we assess and make decisions on our grants and how we will use your application form and other documents you give us. As a public organisation we have to follow the Data Protection Act 1998 and the Freedom of Information Act 2000.

When you complete the Declaration at the end of the application form, you are confirming that you understand the Heritage Lottery Fund's legal responsibilities under the Data Protection Act 1998 and the Freedom of Information Act 2000 and have no objection to us releasing sections 2, 3 and 4 of the application form to anyone who asks to see them once your application has completed the assessment process. If there is any information in these sections of the form that you don't want made publicly available, please explain your reasons below:

We will take these into account when we respond to any request for access to those sections. We may also be asked to release other information contained elsewhere in the form and we will respond to these requests after taking account of your rights and expectations under the Freedom of Information Act 2000 and Data Protection Act 1998. In those cases, we will always consult you first. The Heritage Lottery Fund will not be responsible for any loss or damage you suffer as a result of HLF meeting these responsibilities.

When you complete the Declaration you also agree that we will use this application form and the other information you give us, including any personal information covered by the Data Protection Act 1998, for the following purposes:

- To decide whether to give you a grant.
- To provide copies to other individuals or organisations who are helping us to assess, monitor and evaluate grants.
- To hold in a database and use for statistical purposes.
- To share information with organisations and individuals working with us with a legitimate interest in Lottery applications and grants or specific funding programmes.
- If we offer you a grant, we will publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and in the publications or websites of relevant Government departments and any partner organisations who have funded the activity with us.
- If we offer you a grant, you will support our work to demonstrate the value of heritage by contributing (when asked) to publicity activities during the period we provide funding for and participating in activities to share learning, for which we may put other grantees in contact with you.

Continued...

Declaration (Continued)

We may contact you from time to time to keep you informed about the work of the Heritage Lottery Fund.

☐ Tick this box if you do not wish to be kept informed of our work.

I confirm that the organisation named on this application has given me the authority to complete this application on its behalf.

I confirm that the activity in the application falls within the purposes and legal powers of the organisation.

I confirm that the organisation has the power to accept and pay back the grant.

I confirm that if the organisation receives a grant, we will keep to the standard terms of grant, and any further terms or conditions as set out in the grant notification letter, or in any contract prepared specifically for the project.

I confirm that, as far as I know, the information in this application is true and correct.

I confirm that I agree with the above statements.

Name _____

Organisation _____

Position _____

Date _____

Are you applying on behalf of a partnership?

Yes / No

If yes: Please add the details of additional contacts below:

Section seven: Supporting documents

Please provide all of the documents listed here. When you fill in the online form, please note the following:

- There may be some documents listed on the online form which are not relevant to this grants programme. Mark these as 'not applicable'.
- There may be some documents which are listed here, but are not listed on the online form. Please submit these as 'additional documents'.
- If you attach more than 10 documents, or if the total size of the attachments exceeds 20 megabytes, you will not be able to save or submit your form. If you have more documents or very large documents, please email them to your local HLF office.

1. Copy of your organisation's governing document, unless you are a public organisation, a private individual or a for-profit organisation. If your application is on behalf of a partnership or consortium, please refer to the programme application guidance for more information on what you need to provide.

   If you have sent a copy of your governing document with a previous grant application (since April 2008) and no changes have been made to it, you do not need to send it again. Tell us the reference number of the previous application.

2. Copies of your agreements with project partners, if applicable, signed by everyone involved, setting out how the project will be managed.

3. Copy of your organisation's audited accounts for the last financial year. This does not apply to public organisations.

4. Project Plan (essential for all applications).

5. Calculation of Full Cost Recovery (if applicable).

6. Briefs for internally and externally commissioned work.

7. Job descriptions for new posts.

8. A small selection of images that help illustrate your project. If your project involves physical heritage, please provide a selection of photographs, a location map and, if applicable, a simple site map or plan. It would be helpful if these are in digital format (either as an attachment or on disk).

9. Letters of support (no more than six), from other current funders for example.

10. A copy of the report from the Resilient Heritage strength checker, if you have used this tool. If you have completed other diagnostic tools or audits please include the documentation relating to these.