

Skills for the Future

Grants from £100,000 to £1million

Introduction and help notes





Welcome

We, the Heritage Lottery Fund (HLF), were set up in 1994 to distribute money raised by the National Lottery to heritage projects throughout the UK. In our first 15 years we awarded over £4.4 billion in grants to over 29,000 projects, from multi-million-pound investments in well-known sites and buildings to small grants making a big difference to community groups.

The Skills for the Future programme

Skills for the Future is a £5 million targeted grants programme to support organisations across the UK to create new opportunities for work-based training in the heritage sector. There is one opportunity to apply for Skills for the Future; **the closing date is 12 noon on 19 March 2010.**

The application materials include:

- a pre-application enquiry form;
- **Part one** - this introduction to the Skills for the Future programme;
- **Part two** - notes to help you fill in the application form (help notes);
- an online application form; and
- a declaration (which you must sign and return to us by post when you send your application online).

Contact us

We recommend you use the pre-application enquiry form to tell us about your project before going ahead with a full application. We will let you know whether it is likely to meet our priorities for funding and give advice on what you need to do to make your application.

You should send in your pre-application enquiry form and full application online through our website. However, please contact your regional or country office if you:

- have any particular communication needs;
- need information in other languages or formats;
- would prefer to send in your form in another format; or
- need some help filling in the form.

How to contact us

Phone: 020 7591 6000
Textphone: 020 7591 6255
Text direct: 18001 020 7591 6000
Email: skills@hlf.org.uk

You can find out about our other funding programmes by contacting us or visiting our website at www.hlf.org.uk.

All guidance and other documents referred to in the application materials can be found on our website.

We look forward to receiving your application.

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Part 1 Introduction

About Skills for the Future

This strategic £5million programme will give people the skills that will equip them for a future career in heritage and meet the needs of employers. Skills for the Future will make an important contribution to helping the heritage sector prepare for, and play a role in, the post-recession economy.

Skills for the Future funds projects which provide paid work-based training placements to meet a skills gap in the heritage sector and which fully support trainees to learn practical skills. We will give grants to organisations or partnerships to plan and deliver a new training programme for a specified number of trainees. Typically, these programmes will provide trainees with an individual plan and enable them to work alongside one or more experienced heritage professionals in the work place. They will provide trainees with a bursary payment for the period of their training. We will not fund individual trainees directly.

We will fund skills that are essential to the future conservation of heritage or to opening heritage up to wider audiences. These could include traditional building and natural heritage skills and the skills to deliver education, community participation or volunteering programmes, or to use new media and technology to open up heritage. Traditional skills which are primarily directed towards the making and sale of new craft or art objects are not a priority for the Skills for the Future programme. See Appendix 1 for an indicative list of the type of skills we expect to fund.

Aims

The aims of Skills for the Future are to:

- fund high quality work-based training opportunities to equip people with the skills to pursue a career in heritage;
- enhance the capacity of the heritage sector to deliver sustainable training and share good practice; and
- demonstrate the value of heritage skills to modern life.

Outcomes

To receive a grant your project must deliver all of the following four outcomes:

- increase the range and quality of work-based training to develop skills in the heritage sector;
- meet identified skills gaps or shortages in the heritage sector;
- increase the capacity of the sector to deliver training and share good practice; and
- increase the diversity of the heritage workforce.

Scope

In deploying our budget of £5million we will seek to fund:

- a broad geographic distribution of projects across the UK;
- projects across a range of heritage areas;
- a spread of skills;
- a range of types and sizes of organisation; and
- organisations and trainees that help to diversify the profile of the heritage sector workforce.

Key features

The key features of the programme are:

- it is additional to HLF's existing grant programmes;
- it will give grants to organisations to lead projects which offer paid training placements to individuals in heritage workplaces;
- it will bring new people into the heritage workforce;
- projects will provide training opportunities that are additional to current or recent provision;
- projects will provide training placements between three and 18 months long, unless the circumstances are exceptional;
- training will be accredited, where possible;
- projects will normally last for up to four years, with some extending to five years;
- the minimum size of grant available is £100,000 and the maximum is £1million;
- the total cost of a 12-month equivalent placement should usually be no more than £25,000;
- all grantees will create a training plan, which should usually cost no more than £30,000.

With Skills for the Future we want to maximise the funding directed at trainees and this will be an important consideration when we assess whether your application offers value for money. Our experience of the Training Bursaries programme and our consultation with the heritage sector lead us to suggest that you should be able to provide a 12-month placement for £25,000, including the bursary payment to the trainee and all overheads included in your project (administration, research, promotion, accreditation, evaluation, etc).

We accept some applicants may need to cost their placements at a higher level, for example, those seeking to offer training placements for disabled people who might need their training provider to make

reasonable adjustments to the workplace, or those requiring trainees to travel extensively over large distances, for example in rural Scotland. If your total project delivery cost (not including funding for your training plan) divided by the number of 12-month equivalent placements is more than £25,000 you will need to explain why this is the case. See the worked examples in Appendix 2.

We do not stipulate the level of bursary paid direct to the trainee. This will be variable across projects and might depend on your sector, the age of the trainees and, where applicable, the type of qualification you are offering. For example, there are guidelines for how much a person on a government-recognised Apprenticeship scheme should expect to receive as a payment.

As a minimum, we expect your project to provide the equivalent of four 12-month training placements over its life. So, for example, to meet this requirement you might choose to deliver four 6-month placements and two 12-month placements or another combination. There is no maximum figure for how many placements you can provide; this will depend on the length of the placements and how much partnership funding you bring to your project.

We acknowledge that Skills for the Future applicants cannot guarantee that every trainee who completes a placement will be employed in the heritage sector or go on to further relevant training. Your project should be designed, however, to maximise trainees' chances of pursuing a career in heritage, for example, with well considered trainee recruitment and selection plans and effective support for the trainee during and after their placement. Tell us if you or your partners are able to make a commitment to employ trainees after their placement. We will fund between 5 and 50 grants

through the Skills for the Future programme. We expect high demand for the programme and it may not be possible to fund all of the grant applications that we receive. In order to achieve the intended scope of the programme, we may decide to recommend to our Board of Trustees a lower grant award than you have asked for.

Timetable

There is one round of applications; the closing date is **12 noon on 19 March 2010**. Before you apply, we encourage you to ask us for advice by sending us a pre-application form online. You can also attend a pre-application workshop (see www.hlf.org.uk/skills for details).

Our Trustees will make decisions on awards in May 2010. If you are successful you will then have until **29 October 2010** to develop and submit a training plan. You will be able to start the delivery phase of your project only when we have agreed your training plan, which could be before October. If you need it, we can make a contribution to the costs of developing your training plan. (See further information on the application and assessment process, below, and Appendix 3 Writing a Skills for the Future training plan).

What we fund

Heritage includes many different things from the past that we value and want to pass on to future generations. It can include:

- people's memories and experiences (often recorded as 'oral history');
- histories of people, communities, places and events;
- languages and dialects;
- cultural traditions;
- historic buildings and townscapes;
- archaeological sites;
- collections of items, archives or other materials;

- natural and designed landscapes;
- habitats and species; and
- sites and collections linked to our industrial, maritime (to do with the sea) and transport history.

We will fund the wide range of skills required to conserve, maintain and help people learn about heritage. See Appendix 1 for an indicative list.

When we say 'a project' we mean work or activity that is on top of the everyday work of your organisation, is limited by time and has specific aims.

We can only fund projects that take place in the United Kingdom. Projects should not last more than five years but should provide long-lasting benefits.

Who can apply

We fund projects which promote benefits for the public and which are not mainly for profit or private gain. We welcome applications from single organisations and partnerships. We give priority to not-for-profit organisations and partnerships.

We welcome partnership bids which bring small organisations together and applications that demonstrate that benefits will be shared between large organisations and smaller ones.

Partnerships might be drawn from:

- organisations whose main purpose is to conserve or engage people with heritage;
- Third sector organisations, such as charities or infrastructure organisations;
- strategic bodies, such as Sector Skills Councils or Local Authorities;
- professional bodies;
- learning and training providers, such as colleges, universities or heritage training centres;
- private-sector companies, for example, specialising in conservation.

As Skills for the Future aims to deliver work-based training we would normally expect to fund projects led by a heritage organisation and not, for example, by a learning or training provider. If private owners are involved, we expect the public benefit to be greater than any private gain.

Partnership funding

You must be able to raise part of your project costs from your own or other sources. We anticipate receiving more grant applications than we can support and we expect you to contribute as much as you can. We will ask you to tell us who else you have asked for funding and how much they will contribute, and we will take this into account when we look at the value for money your project offers.

You must provide **at least** 10% of the project costs. We expect **at least** 5% of your project costs to be contributed from your own resources, either in cash or in kind (for example, goods or services offered without charge), and/or volunteer time. You will need to have your partnership funding in place when your training plan is submitted.

What we do not fund

We do not give grants for:

- projects that do not focus on heritage skills;
- projects focussed on traditional skills which are primarily directed towards the making and sale of new craft or art objects;
- current employees to undertake training whilst their post is held open for them;
- people to attend courses, where this is the principle means of learning;
- training programmes where the majority of learning takes place outside the workplace;
- work experience placements for people under 16;
- projects that have already started;

- repeat projects or continuing projects that we have funded before (unless the range of benefits to heritage or the people involved is different to the original);
- work or services that are part of the central business activities or responsibility of your organisation, such as:
 - professional training for your existing staff to do their jobs or enhance their knowledge;
 - meeting legal responsibilities for staff such as under the Disability Discrimination Act.
- planning work before your application, including options appraisals (assessing what options are available), and feasibility studies (showing whether the chosen options are possible); and
- projects that promote the work of political and faith organisations. (However, we welcome applications from faith organisations for heritage training projects that meet our aims.)

Contact us if you are not sure whether we can fund your project.

Intellectual property

For projects involving creating or using intellectual property (for example, creating a database, digital images or audio or other multimedia applications), we expect you to get all permissions, waivers and licences from any other person or organisation who may be entitled to any intellectual property rights which either exist or will be created to allow you to carry out and complete the project in line with your application.

Welsh language

If your project is based in Wales or you have trainees based in Wales, we expect you to make appropriate use of the Welsh language when you deliver the project. Please read our guidance *Incorporating the Welsh Language into your project* for further information.

Learning from experience

In 2004 we launched our Training Bursaries programme and since then have invested £9.8million in 10 projects. These projects are ongoing. Although they are focussed almost exclusively on conservation skills, they offer useful models and lessons learned to anyone developing a programme of on-the-job training in specialist skills.

We have also funded a range of training-focussed projects through our main grants programmes, and other organisations have developed innovative training initiatives. We have drawn together some examples to help you think about the issues involved in developing a training project. You can find case studies here: www.hlf.org.uk/skills. In spite of this investment, we know that skills gaps and shortages remain in the sector.

The application and assessment process – an overview

Application flow chart

All projects

Download or ask for the Skills for the Future application pack.
Read this introduction and application form help notes.
Attend a pre-application workshop (optional).



Send us a pre-application enquiry form.
We will tell you whether your project is likely to meet our aims and what to do next.



Applications

Send us your application form and supporting information
by 12 noon 19 March 2010.



We assess your application.

We might contact you to discuss your project.

Our Trustees will make a decision on applications to Skills for the Future in May 2010. The outcome will be either:

- a you are awarded a grant and asked to develop a training plan;
- b we say you have made an unsuccessful application – if this is the case we will explain the reasons why.



Successful applications

We discuss with you developing your training plan.

If you have little experience of doing a project of this type, or on this scale, we may offer you a mentor to support you in developing your training plan. You must apply for and receive formal permission to start your project. We will keep in touch with you as your project progresses and ask for progress reports.



Submit training plan

You can submit your training plan at any point after our Trustees' decision in May but we must receive it by 29 October 2010. We will assess whether your training plan will lead to a project that successfully meets our aims and outcomes for this programme and give you our decision within one month. If it does not, we will withdraw your grant.

You will not have to repay any grant you have already received.



Training plan successfully completed

We discuss with you how you should deliver and monitor your project.



Permission to proceed with the project

When your training plan has been agreed by us, we will formally give you permission to start work on delivering your project.



Delivering the project

You deliver your project in line with your proposals and meet our conditions as set out in:

- Managing your grant;*
- How to acknowledge your grant;*
- Standard terms of grant.*



Complete your project

You send us a completion and evaluation report before we release the final 10% of your grant.

Project stages and your Skills for the Future application

The table below gives an idea of how much information we are looking for, and at what point we expect you to be in developing your project, at each stage in your application.

<p>Looking at your initial idea</p> <ul style="list-style-type: none">• Identify your aims.• Consider your options (including analysing the strengths and weaknesses of each option) and develop reasons for choosing the option you have gone with.• Attend one of our pre-application workshops (optional).
<p>Send us your pre-application enquiry form.</p>
<p>Basic proposals</p> <ul style="list-style-type: none">• Set out a basic timetabled programme of activities for the first year of your project.• Identify the costs and likely sources of partnership funding.• Broadly identify the types of people who will benefit.• Broadly consider any limitations and risks.• Consult the main people who have a direct interest or who would be affected by your project (stakeholders).• Create a detailed and costed plan for the development of your training plan, with briefs (written description of the work or services needed) for consultants (if these apply).
<p>Send us your application by 12 noon on 19 March 2010. If you are successful:</p>
<p>Detailed proposals – developing further your outline proposals into a training plan</p> <ul style="list-style-type: none">• Write a training plan, including:<ul style="list-style-type: none">- detailed outputs, timetable and costs.- a detailed risk assessment.- final job descriptions (if these apply).• Produce a final proposal for buying goods and services.• Produce a final proposal for acknowledging our support.
<p>Send us your completed training plan, at the latest by 29 October 2010.</p>
<p>When we have agreed your training plan your project can progress</p> <ul style="list-style-type: none">• Your project delivery team should be in place and you should advertise new posts.• All partnership funding must be in place.• You will agree the final outputs, timetable and costs with us.
<p>Delivering the project</p> <ul style="list-style-type: none">• All the resources you need must be in place.• You must track all costs.• You must regularly consider proposed changes.• You must continue to assess the project against your original aims and outputs.• You must give us regular progress reports.
<p>Evaluating the project</p> <ul style="list-style-type: none">• Complete your evaluation of the project.• Record the lessons you have learnt.• Assess the performance of your project team and give us feedback.• Report back to your stakeholders.• Permanently acknowledge our support.• Send us a completion and evaluation report.

Your application

Preparing your application

Contact us for advice on your project proposals before you apply using the pre-application enquiry form. We will let you know whether your project is likely to meet our priorities for funding and tell you what you should do next to make an application to us.

We have produced guidance on a number of issues to help you develop a good-quality application. A full list of guidance is available on our website but the following documents might be particularly useful:

Title	For which projects
Appendix 3 to this document 'Writing a Skills for the Future training plan'	Essential reading for all projects
<i>How to acknowledge your grant</i>	Essential reading for all projects
<i>Thinking about training...</i>	Recommended reading
<i>Understanding full-cost recovery</i>	For voluntary-sector applicants who want to claim a percentage of their organisational overheads as part of their project costs
<i>Incorporating the Welsh Language into your project</i>	For applicants with projects or trainee placements based in Wales

Filling in the application form

The help notes to each question explain what information and documents we need to see. **Do not send information that we have not asked for as we will not use it in our assessment.**

Your application

We expect to see basic proposals in your application. At this stage you need to show us in summary that:

- your project has a clear focus on heritage skills, and that it meets a clear need or takes advantage of an opportunity;
- you have a clear vision of what you want to achieve;
- you can describe how your project will meet the outcomes for the programme and what difference it will make;
- you know broadly what problems or risks you might come across;

- you have a well considered estimate of overall costs, and the amount you want to ask us for, and you have plans for raising the rest;
- your project is likely to be financially sustainable in the long term; and
- your project will deliver good value for money.

Developing your training plan

In your application you must tell us what work you expect to do to develop your training plan.

If you are successful in your application, your case officer will tell you what is expected in developing your training plan (see Appendix 3 Writing a Skills for the Future training plan). If you have little experience of a project of this type or on this scale, we may appoint a mentor to help you develop your training plan.

Delivery of your training plan

Once we have agreed your training plan, we will discuss with you how you should deliver and monitor your project. We will review whether the final proposals are acceptable and that the project is still financially realistic and offers value for money. We will review the support structure for your project before we start to monitor it.

If we do not receive your training plan by 29 October 2010 or we decide your training plan will not meet the aims of your project or is of an insufficient quality we will write to you and begin the process of withdrawing your grant. Decisions on grant withdrawal will be taken by our Trustees.

Assessment and decision-making

What we will assess

In assessing your application we will consider the value for money offered by your project, taking account of the overall benefits of the project in relation to costs and the amount of grant you want from us.

We will assess how far your application shows that:

- your project is relevant to the UK's heritage;
- your project will meet the aims and outcomes of the Skills for the Future programme;
- your project is an appropriate response to a heritage need or opportunity;
- your project is well planned and your proposals for managing it are sound;
- your organisation or partnership is capable of delivering the project outcomes;
- your project is financially realistic and there is a clear need for Lottery funding;
- your project meets our guidance on *How to acknowledge your grant*;
- your project will offer long-term benefits;

- you have fully explored other sources of funding and need the amount of grant you have asked for to go ahead; and
- your project will be evaluated appropriately.

If we make an award and invite you to submit a training plan, we will assess how far the plan will deliver the aims of your project as set out in our grant award letter.

In assessing your application and training plan we may ask for advice from specialists.

Decision-making

Decisions on applications to Skills for the Future will be taken by our Trustees.

The application process is competitive. Demand for our funds means that we cannot usually support every application that meets our criteria. The success rate for applications will depend on:

- the number of applications we receive;
- the total amount of grant you ask for; and
- our available budget.

In reaching a decision, if there are more supportable projects (in other words, projects that meet our criteria) than the available budget can cope with, our decision takers will use their judgement to choose which applications to support. They may take account of other relevant considerations, for example (in no particular order of importance):

- value for money – taking account of the overall benefits which projects will have the most positive effects and give us the opportunity to make the greatest difference for our investment;
- the case for carrying out the project with public funding, including the risks or opportunities associated with not supporting a project;
- the need for our funding in particular, and considering whether you have fully explored all possible sources of other funding;

- whether a project will add value through building partnerships and attracting other funding;
- projects of exceptional value and lasting importance; and
- how much funding an area has already received.

How we will monitor your project

Managing your grant

We will send you our guidance documents on *Managing your grant* which provide guidance on how to monitor your project, so that you can tell us about its progress and how well it is meeting its aims. We may choose someone to help us monitor your project. We will also review your project at important stages of its development.

Buying goods, works and services

If you receive a grant, you must get at least three competitive tenders or quotes for all goods, work and services worth £10,000 or more that we have agreed to fund.

And, beyond certain published limits and when public-sector funds (including our grant) make up more than 50% of the cost of your project, you must follow all European Union (EU) and World Trade Organisation (WTO) procurement regulations (regulations for buying goods, work and services).

You can find useful information and guidance at:

<http://www.ogc.gov.uk/documents/ProcurementPolicyPublicContractsRegulations.pdf>

http://www.ogc.gov.uk/documents/Intro_to_EU.pdf

We strongly advise you to get professional or legal advice. If you have not followed the correct procedure, we will not pay the grant.

You must advertise for all new staff posts.

Paying grants

We will pay your grant in instalments as you spend money while carrying out work on your project. You will need to send us regular requests for payment supported with invoices or payment certificates showing how much of the work that we have agreed to fund has been done. We would normally expect to receive your requests for grant payment around once every three months.

We will check each request for a grant payment and aim to pay our percentage share of the actual costs within three weeks. Because we can only pay our grant after the work has been done, you may need to pay the invoices you receive before you can ask for your grant. Consider carefully how you will cover these costs until you receive your grant.

Completing and evaluating your project

Evaluating your project falls into three phases.

- 1 You should monitor and evaluate the project while it is being delivered. We will expect you to collect data on individual trainees to a standard format we will provide and to report on the progress of trainees beyond their placement. You must send us regular progress reports as set out in our guidance *Managing your grant*.
- 2 You must send us a final completion and evaluation report at the end of your project. We need this before we will release the final 10% of your grant so you will need to budget carefully for the final part of your project.
 - In this report we will ask you to 'tell the story' of your project – returning again to why you wanted to do it, what work and activities you did carry out (compared to what you had planned to do), and what the benefits have been.
 - The report should include details of issues or events relating to managing the

project, staffing or the programme, that you consider have been successful or unsuccessful.

3 As part of our procedures for making sure you keep to the terms of our grant, we will send you an evaluation questionnaire one year after your project is completed.

See our guidance in Appendix 3 Writing a Skills for the Future training plan for more information.

Promoting and acknowledging your grant

The funds that we distribute are raised through the National Lottery. We receive one-sixth of the Lottery money that goes to the 'good causes' and it is important that we give Lottery players and the public as much information as possible about the grants we make. This is in line with our commitment to being open about our responsibilities and actions.

As a result, we may publish, on our website, the fact that you have applied to us, what you have applied for and details of any decision we have made about your application. We may also make this information available to the media. To do this we will use information that you have given us in your application.

There may be times where you would prefer us to delay publishing information relating to your application. We will consider this with you at the time.

Public support is vital to make sure that Lottery investment in heritage continues in the long term. We want the value and benefits of Lottery funding for heritage to be widely understood and appreciated.

If we give you a grant, you must publicise and acknowledge it. We can contribute to the costs involved if you have included them in your project budget. We will expect you to publicise and promote your project as widely as possible, to:

- make sure that people have opportunities to take part;
- contribute to its future; and
- make sure that the National Lottery's contribution is recognised.

Your acknowledgement of your grant must be clear to all visitors using your site, on publications or displays, or to people taking part in activities. This should be in place as soon as we confirm an award at the second round and before work begins. You must make sure you acknowledge your grant publicly in line with *Managing your grant* and minimum conditions set out in our guidance *How to acknowledge your grant*. You should do this by using the 'crossed fingers' and the HLF logo. We supply these to you as one piece of artwork.

Other information about your application

Freedom of information

We have a duty to keep to the Freedom of Information Act 2000. When you sign the declaration at the end of the application form, you are confirming that you have no objection to us releasing sections 2 to 4 of the application form to anyone who asks to see them. If there is any information in sections 2 to 4 of the form that you don't want made publicly available, please say this in the space provided and explain your reasons. We will take these into account when we respond to any request for access to those sections. Otherwise, we will release sections 2 to 4 to the public if asked. 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, the Freedom of Information (Scotland) Act 2002 and the Data Protection Act 1998. In those cases, we will always consult you first.

Data protection

Under the Data Protection Act 1998 we will process personal information relating to your organisation, its officers and staff or any other people referred to in your application, for:

- assessing your grant application and how we handle it;
- handling the terms of our grant;
- sharing information with our specialists and monitors;
- keeping you in touch with our work (including by email, where an email address has been given). If you would prefer not to receive information from us which is not connected to your application or grant, you can let us know at any time by sending an email to enquire@hlf.org.uk, telephoning 020 7591 6042 or writing to the Information Team, Heritage Lottery Fund, 7 Holbein Place, London, SW1W 8NR;
- publicising information about your application;
- research related to your application;
- sharing information with other Lottery distributors or grant-making organisations and other carefully identified organisations (such as best-practice groups) who may want to contact you about your application or project; and
- other legal or regulatory purposes, or other purposes reasonably related to making grants (such as customer surveys).

Complaints

If you are not happy with the service you have received, please contact the office you first dealt with. They will try to put things right. If you are not satisfied with the response you receive, you can take this further by writing to our Chief Executive. You can get a copy of our complaint procedure from our website or any of our offices.

Part 2 Help notes

These help notes explain in more detail what information we want you to provide in answer to the questions on the application form.

It is important to answer each question as clearly and concisely as you can. If you have any problems or questions, contact our helpline or country and regional teams. As a guide we would not expect your answers to any of the seven sections to be more than 1000 words (about two sides of typed A4).

As well as filling in this form you will need to give us all supporting documents and your signed declaration by the closing date of 12 noon on 19 March 2010 – see our list of supporting documents needed with your application. If you are awarded a grant in May 2010 you will need to submit a fully worked up Training Plan before 29 October 2010.

Title of your project

- We will use your chosen title on our website and may also use it for other publicity purposes so it should capture what your project is about.

Section one – Your organisation

1a Name and address of your organisation

- Give the official or registered address with the full postcode.
- The name should be the same as that on your constitution.
- If this is a joint application, give the name of the lead organisation.

1b Name of main contact person

- Give details of someone who can talk about your application in detail during normal working hours.

- This person 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. You must tell us if you would prefer to receive correspondence by post.

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

- Explain when and why your organisation or partnership (if it is a joint application) was formed.
- Describe its purpose and aims as shown in your constitution (your organisation's formal rules).
- Describe your organisation's regular activities and how they are paid for.
- If you are applying as a partnership, give the names of all organisations in the partnership. Describe the regular activities of the partnership and how they are paid for. Include only the partners who will be responsible for managing and steering your project and not, for example, organisations that might host training placements during the delivery of your project.
- If your partnership includes any private owners or commercial companies, tell us what funding they will receive as part of your project. We would not expect a commercial company to be a lead applicant on a Skills for the Future project.

1e Describe the size and staff structure of your organisation

- Tell us the number of paid staff (full-time and part-time) and describe the role of staff and volunteers (if any).

- If you are applying as a partnership, describe the roles of any paid staff (full-time and part-time) or volunteers employed specifically for the partnership.
- Tell us what posts you will be recruiting for as part of your project.

1h **Have you received advice from us before making your application?**

- Tell us if and when you have received advice from us.
- Tell us the name of your contact at HLF.

Section two – Skills to conserve and open up heritage

2a **What skills does your project focus on?**

Provide a short description of the skill or skills that your training project will deliver.

- Tell us about the practical skills you will help people to learn, for example, how to plan and deliver a family learning programme, how to repair and maintain a lead roof or how to catalogue an archive. Avoid describing job roles or professions.
- Tell us if people will be learning skills that are specific to one or more types of heritage, for example, museums, historic environment or natural landscapes.

2b **Why are these skills important to the future of heritage?**

Describe why these skills are essential to the future conservation of heritage or to opening up heritage to wider audiences.

- Explain why the skills are important to the local area, to the region or to the nation.
- Tell us why the skills are important to people beyond your own organisation.

- Tell us about any research or surveys that have been done that help us to understand why these skills are important.
- Explain why these skills should be a priority for Lottery funding.

2c **How do people learn these skills now?**

Tell us about the training currently available in the UK.

- If there is a strategic agency or professional body with a remit to support these skills, tell us briefly about its recent research or practical work.
- Where do people learn the skills that are the focus of your project and who delivers the training?
- How many people are trained in these skills and how do they contribute to the heritage sector?
- Who is trained in these skills? Do they represent the diversity of the UK workforce?
- What is the quality of the training provided? How does it meet the needs of heritage employers?
- If these skills are at risk or under threat in some way tell us how you know and explain the reasons why.
- Tell us if these skills are already a priority for mainstream government funding.

Tell us what problems or opportunities there are in relation to increasing the number and/or range of people with these skills. For example,

- what opportunities exist to improve the delivery of training in these skills?
- what barriers could be removed to help increase access to these skills?

Section three – Your project

3a What will your project do?

- Tell us about the aims of your project and describe the activity your project will involve to achieve those aims.
- Tell us how long your project will last.
- Consider the problems you described in section two which you want to solve.
- The majority of your project should be focussed on the delivery of work-based training placements. We will ask you to provide a detailed training plan if your application is successful. Here tell us very briefly:
 - how many people you will train;
 - what kinds of people you will train, for example unemployed people or women;
 - what age group(s) will you target;
 - what level of experience or qualification you will expect trainees to have, if any;
 - what length training placements you will offer;
 - where you anticipate the placements will be located;
 - who you anticipate will deliver the training;
 - what support you will offer these trainers.
- If you are planning to deliver fewer than the equivalent of four year-long placements, explain why.

3b What experience can your organisation or partnership draw on to deliver training in the heritage sector?

- If you have planned and delivered training programmes in the past, describe them briefly and tell us how you will include the lessons learned in your project.
- If you have no direct experience of delivering training tell us how you will ensure your project reflects best

practice in training and meets the needs of heritage employers.

3c How have you arrived at this project?

We expect high levels of demand for Skills for the Future funding. You will need to show that there is a real need for this project in the current economic climate and that you have thought about all other options. Tell us:

- how you got the idea for your project and what other options you considered before deciding to develop this approach to your project;
- how you know there is need and demand for the project;
- how the project fits into the wider aims of your own organisation and what support you have for the project outside your own organisation;
- if your project relates to any regional or national strategies; and
- how you will move your project forward if you are not successful with Lottery funding.

Section Four – Project outcomes

In section three we asked you to list the aims of your project and to describe the activities that you will do to help achieve your aims. In this section we ask you to describe your project's outcomes – the eventual benefits that your proposals will achieve. You can summarise these as the difference your project will make to the heritage sector, to trainees and trainers, to your own organisation and partners, and to the environment.

4a How will your project increase the range and quality of work-based training to develop skills in the heritage sector?

Describe in outline how your project will meet the needs of potential trainees and provide them with positive and effective

training placements. If your application is successful we will expect to see more detail on these issues in your training plan.

- Tell us how the length and location of your training placements will provide people with the skills they need to pursue a career in heritage. For example, how will you ensure that trainees have the opportunity to learn in a range of heritage settings or undertake projects suitable for their entry level so that they enhance their confidence and competence?
- Tell us how your project will provide trainees with learning that is linked to national occupational standards and, where possible, give them credit for their learning, for example, through vocational qualifications. How will you know their skills have improved as a result of their placement?
- Tell us how your project will support the trainees financially, for example, through bursary payments and expenses to cover trainees' costs such as equipment and travel.
- Tell us how your project will provide the trainees with high quality support, for example, by ensuring supervisors, mentors and assessors are qualified to deliver workplace learning and, for example, by creating networks of trainees and experts to meet and reflect on practice. How will you ensure all of the trainees in your project receive a consistent quality of training placement?
- Tell us how your project will ensure trainees have a safe and healthy working environment.
- Tell us how your recruitment of trainees will provide fair and competitive opportunities for individuals to benefit from your project.
- Tell us how you will support trainees to help them into employment following the training placement.

4b How will your project meet identified skills gaps or shortages in the heritage sector?

We need to understand the difference that your project will make to the heritage sector and in particular how it will contribute to ensuring that there are enough skilled people able to take care of heritage and to enable more people to learn about and take part in heritage in the future.

- Tell us to what extent your project will meet the needs of heritage employers and fill the skills gaps and shortages in the heritage sector that they have identified.
- Explain what will be the outcomes for heritage of having more people trained to work in the sector. Please give examples, such as:
 - more people will be trained to engage people with heritage using new media and technology;
 - there will be more trained stone masons able to work on heritage buildings;
 - our ability to deliver learning programmes will be greatly enhanced in the future because we undertake to offer at least one Skills for the Future trainee a permanent position in our organisation;
 - more young people will be brought into the economy and be encouraged to make a career in heritage.

4c How will your project increase the capacity of the sector to deliver training and share good practice?

- Tell us how your project will make a difference to the way training is planned and delivered in your organisation or partnership and in the sector more widely.

- Explain how you will tell heritage organisations and professionals about the learning from your project, for example, through conferences, training days and publications.

4d **How will your project increase the diversity of the heritage workforce?**

- Tell us if there are groups of people who are currently under-represented in your part of the heritage workforce.
- Explain which groups of people you will target in your project and how you will reach them.
- Tell us how you will draw on the lessons learned from other projects and expertise outside your organisation to help you reach new people with your project.

4e **What are the main groups of people who will benefit from your project?**

Please summarise the range of people that you are planning to attract as trainees. We do not prioritise projects for any particular group. We will use this 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.

- If your project aims to benefit a wide range of people and is not specifically targeted at any particular group, tell us this.
- If your project will specifically benefit a particular group or groups of people, tell us which groups. For example, people from the Indian community, young people, people with disabilities or women.

4f **How will you maintain the benefits of your project in the long-term?**

All projects must leave a legacy (long-lasting benefits) for the heritage sector and for people. Although we can only fund projects with a limited timescale, up

to a maximum of five years, we will expect you to tell us what will happen after the project we fund is complete. Tell us:

- whether your organisation will be able to continue the training in any way?
- how you will make sure that other people can learn about your project afterwards (for example, by keeping a good record of what was done);
- how your project will help your organisation to change and develop for the future. For example, your organisation may:
 - create new jobs for the project and for the longer term;
 - change its management structure;
 - make new long-term commitments to training; or
 - set up new partnerships.

4g **How will your project affect the environment?**

We need to understand what positive effects your project will have on the environment and in what ways you will reduce, as far as possible, any negative impact.

Section five - Developing and delivering your project

5a **Who are the main people responsible for developing and delivering your project?**

We are looking to see that your project will be well managed by an appropriate person and a suitably skilled supporting project team.

- Give a broad description of your project team including the person who has overall responsibility for your project, the day-to-day manager of your project, and the main people in your project team (including volunteers). Describe their skills and experience that make them suitable to be part of the project team.

- Explain who is responsible for making decisions and approving changes to your project.
- Describe the reporting structure and how often meetings will take place.
- Also tell us about any other projects your organisation is likely to be delivering at the same time and if any staff working on your heritage project will also be working on other projects.

5b Describe in detail the work needed to complete your training plan.

- Tell us about the work needed to complete your training plan. See Appendix 3 Writing a Skills for the Future training plan for guidance on what you will need to do.
- The development of your training plan could be carried out by:
 - existing staff or volunteers;
 - new staff appointed specifically to help develop and deliver the plan; or
 - consultants or freelancers who are paid to help with this specific piece of work.
- If you are employing new staff or consultants, send us the detailed job description or brief that you plan to use to appoint them.

5c What are the risks to developing and delivering your project and how will you manage those risks?

All projects will face threats and opportunities that you need to identify and manage. We are looking to see that you understand the range of risks that you may face and are in a good position to manage them.

- At the first round you must start to think about the possible problems that you may face. These risks could be:
 - o technical – for example, a failure of IT or machinery needed to deliver your training;

- o financial – for example, a reduced contribution from another funding source;
- o organisational – for example, a shortage of supervisors or mentors with the training or workplace assessment skills you need;
- o economic – for example, an unexpected rise in the cost of materials;
- o social – for example, negative responses to consultation or a lack of interest in the training places you offer;
- o management – for example, a significant change in the project team;
- o legal – for example, changes in law that make the project impractical.

Using the grid provided, describe the most serious risks that you consider may happen when delivering your project if we award you a grant.

- You should take account of how any risks will affect the amounts you are allowing for 'contingency' in section 6.

5d Provide a timetable for the first year of your project, including the development of your training plan.

If you are awarded a grant you will hear from us in late May 2010. You will have until noon on 29 October 2010 to provide us with your training plan. You can submit this and get permission to start delivering your project as soon as you are ready.

Include realistic timetables to recruit any new posts involved in developing your training plan and delivering your project. Timetable all of the work you will do in the first year, which might include training trainers, advertising trainee placements, interviewing potential trainees, or setting up a website.

Section six – The costs of your project

6a Fill in the table.

Read the whole of this help note for section six before completing the tables.

There are two cost tables. Table A is where you should give a breakdown of the costs related to developing your training plan and Table B is where you should provide details of the costs of delivering the training. Table C asks you to itemise the project income.

Table A - Costs of developing your training plan.

We would not normally expect the total costs of developing a plan to be more than £30,000.

Table B - Costs of delivering your project.

- This table covers the breakdown of all the costs of the project once the development of the training plan element is completed and approved by HLF.

You should make sure that you have tested all costs – for example, they are based on quotes or on costs for similar projects. For all goods, work and services of £10,000 and above, you will have to get at least three competitive quotes. You must also follow all European Union and World Trade Organisation procurement regulations. Please see Buying goods, works and services for your project in the Introduction to the Skills for the Future programme.

You must appropriately advertise all new staff posts.

You must make sure the costs are as accurate as possible. We will not contribute to any additional costs once we have agreed to give you a grant.

Columns

- First column – Cost headings
The costs in this column are summary headings that we ask you to follow.
- Second column – Description
Please add extra lines to describe the individual costs.
- Third column – Costs
Please insert the relevant costs – without VAT and contingency (money to be used only for unexpected extra costs).
- Fourth column – Value Added Tax (VAT)
 - Make sure that you only include VAT in this column and not in the costs presented in the third 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 (www.hmrc.gov.uk) to check how much VAT you will need to pay.
 - We cannot authorise the transfer of any part of the project costs to or from VAT. This means that if you underestimate VAT, you will have to pay the extra costs, and if your VAT status changes so you can reclaim more than you expected, you will need to return this to us.
 - You should make sure that all quotes you get clearly show whether VAT is included or not.
- Fifth column – Contingency
 - Make sure that you only include contingency in this column and not in the costs presented in the third column. Not all cost items will need a contingency, especially activity costs. Your calculation for contingencies should reflect:
 - the degree of certainty with which you have arrived at your cost estimates;
 - the project timetable; and

- o the risk in relation to the type of project you are carrying out.
- We will only agree to you using the contingencies if you can show an unexpected need within the aims of your project.
- Make sure that your response to question 5c (relating to risk) influences your decision on levels of contingency.
- As a general guide, up to 8% may be appropriate for each budget heading.

Table C – Income

This table covers the range of income you will bring to your project. You must be able to raise part of your project costs from your own or other sources. We expect you to show you have tried to raise funding from all other appropriate sources and have contributed as much partnership funding as possible.

You must provide at least 10% of the project costs. 5% of the total costs of your project must be from your own organisation's resources, either in cash or in kind. Non-cash contributions can include goods or services offered without charge, and volunteer time.

Cost headings

For each cost heading you can break down your costs by adding extra lines so that the cost tables are as detailed as you can make them.

Table A Developing your training plan

A1 Managing development

You may decide to recruit a project manager to oversee the project. This could be either as a new member of staff on a fixed-term contract or employing a consultant for an agreed number of hours each week or month. Only include here the cost of managing the development of the training plan. We cannot contribute to the costs of staff already on your

payroll unless you are a voluntary-sector organisation claiming full cost recovery to backfill the post. See note A3. See also *Understanding full cost recovery*.

A2 Professional fees – development

Fees should be based on a clear written specification.

You must use a separate line for each consultant.

A3 Development staff costs

We can contribute to new fixed-term contracts, secondments (people who are temporarily transferred to your organisation) and the costs of freelance staff to help develop your project.

You must advertise all posts appropriately and base salary levels on sector guidelines or similar posts elsewhere.

You may move existing members of staff into a position that has been created for a project but you must justify, in your application, that they are the most suitable person for the post. In this situation we can only contribute to the costs of filling the position then left empty. It is these costs you should add here.

A4 Recruitment

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

A5 Other development costs

Include all other costs you know about.

A6 Development non-cash contributions

You may receive some items without charge – for example, the use of meeting rooms or other resources. You should reflect the estimated value in your project costs and income as 'non-cash contributions'.

A7 Development volunteer time

You may receive time given by volunteers to help you develop your training plan. You should use the following rates for different types of work.

- Professional labour – £350 a day. For example - accountancy or legal advice.
- Skilled labour – £150 a day. For example, a craftsman.
- Unskilled labour – £50 a day. For example, clerical support.

A8 Total

Add up the cost of developing your training plan.

Table B Delivery costs

B1-B3 (See the help notes A1 – A3)

B4 Training for project staff

This includes the cost of resources needed to train those managing the project or supporting the delivering of training.

B5 Travel for project staff

This may include the costs of travelling to a site. Travel costs by car should be based on 35p a mile.

B6 Recruitment of project staff

You must recruit any project manager or administrative staff using a brief and an appropriate selection process. See also notes A1 – A4.

B7 Recruitment of trainees

This may include publicity, advertising and interviewing costs.

B8 Trainee payments

Tell us here the total costs of all the bursary payments you will make to the trainees you recruit.

B9 Travel for trainees

This may include any additional travel costs incurred by the trainees during their training such as the costs of travelling to a site which is not their usual training venue. Travel costs by car should be based on 35p a mile.

B10 Expenses for trainees

This may include the costs of personal equipment or clothing for trainees to ensure they do not face barriers to accessing training and that they are safe in the workplace.

It may include the costs of any additional short-term courses or training that you will buy in for the trainees from a third party, for example, a course to acquire a chainsaw license or health and safety training.

It may include food and any other expenses to ensure trainees are not out of pocket when they are outside their usual training venue.

B11 Equipment and materials

This may include equipment and materials related to the delivery of your project as a whole, for example, computer and office materials or tools.

B12 Promotion and publicity

We can fund promotional materials that relate directly to your project and help share good practice. If we give you a grant, you must publicise and acknowledge this so that as many people as possible know about the benefits of Lottery funding for heritage. You must make sure you acknowledge your grant publicly in line with *Managing your grant* and our conditions set out in our guidance *How to acknowledge your grant*. We can contribute to the associated costs if you have included them in your project budget.

B13 Evaluation

Please read the section on evaluation in Appendix 3 Writing a Skills for the Future training plan. All projects must be evaluated. Some will be evaluated by staff in your own organisation. Depending on the scale and how complicated your project is you may want to employ somebody to help evaluate your project and assess whether the aims of the project are being successfully met. You should include the costs of this here.

B14 Other

Please list any other items that you consider are needed to deliver your project successfully.

B15 Non-cash contributions

During the delivery of your project, you may receive some items without charge – for example, using a room in a local college for training activities or a donation of materials from a local firm. You should reflect the estimated value in your project costs and income as ‘non-cash contributions’.

B16 Delivery phase volunteer time

You may receive time given to your project by volunteers. You should use the following rates for different types of work.

- o Professional labour – £350 a day. For example - legal advice, accountancy.
- o Skilled labour – £150 a day. For example, a craftsperson.
- o Unskilled labour – £50 a day. For example, clerical support.

Note that the trainees that will benefit from your project are not volunteers.

B17 Total costs

Add up the cost of delivering your project.

C Income

C1 Cash

For all requests for grants, we expect your organisation to contribute at least 5% of costs in the form of cash or non-cash contributions.

We accept cash funding from any public, charitable or private source, including European programmes.

You can use funding from another Lottery distributor for parts of the project that we are not funding. However, this does not count towards the 10% minimum contribution to the project from your own or other sources.

You do not have to have all the contributions in place when you apply to us. However, you must have them by the time you have completed your training plan. We will assess whether your partnership funding expectations are realistic.

C2 Non-cash contributions (see note B15)

This should be the total amount as stated in A6 and B15.

C3 Volunteer time (see note B16)

This should be the total amount as stated in A7 and B16.

C4 Asking us for a grant

You can ask for up to 90% of the project costs. Your total grant request for both the development of your training plan and the delivery of the project should not exceed £1million.

Summary costs

Total project costs

Add together table A and B totals.

HLF grants are rounded down to the nearest £100. The online form does this automatically. Your income total on the

online form may therefore show up to £99 less than the total costs.

6a If the cash contributions from other sources have not yet been confirmed, when do you expect them to be confirmed?

Give an indication of when you expect any partnership funding or contributions to be secured.

6b How have you worked out the share of your organisation's overheads that relate to your project (if this applies)?

This applies to voluntary sector organisations only when they are applying for full cost recovery. Give an indication of how you calculated the overhead costs for this project where these are a percentage of your organisation's total overhead costs. There are certain things you can and cannot include as overheads. You can get more guidance on working out overheads in our guidance *Understanding full-cost recovery*.

6c What is the full cost of providing a 12-month equivalent training placement?

If your training placements are not of 12 months duration, then calculate the full costs on a 12-month equivalent basis.

We would not normally expect the total costs associated with providing a 12-month full-time equivalent placement (including bursary payment to the trainee and all of your other project costs outlined in Table B) to exceed £25,000. If your answer to this question is above £25,000 then please explain here why you consider your placements will deliver good value for money. See Appendix 2 for worked examples.

Section seven – Celebrating your project

7a How will you publicise your project? Tell us about any promotional activity or

press work you are planning during the development and delivery of your project.

7b How will you acknowledge your HLF grant?

If we give you a grant you need to acknowledge this so that as many people as possible know about the benefits of Lottery funding for heritage. You must make sure you acknowledge your grant publicly in line with *Managing your grant* and our conditions set out in our guidance *How to acknowledge your grant*. We can contribute to the associated costs if you have included them in your project budget.

7c How will you evaluate the success of your project and share the learning?

All projects must be evaluated. We can contribute to the associated costs if you have included them in your project budget. See Appendix 3 Writing a Skills for the Future training plan for guidance. We will expect you to collect data on individual trainees to a standard format that we will provide and to report on the progress of trainees beyond their placement.

Tell us how you will share the learning from your evaluation and who you will share it with.

Standard Terms of Grant

The Standard Terms of Grant apply to all our awards.

- There may be further conditions that will apply to your project. We will tell you about these before we award your grant and they will be set out in the letter awarding the grant.
- We will prepare a contract specifically adapted for your project if we feel that this is appropriate.
- The requirements in *Managing your grant* form part of the terms of any grant awards that we may make. We consider breaking the conditions of

Managing your grant as breaking the terms of the grant.

- If work begins on the project before we award a grant and before we have agreed that work can start, we may withdraw our grant.
- We will also withdraw our grant if you fail to deliver a training plan that meets our requirements by the deadline of noon on 29 October 2010.
- If your grant is less than £200,000, the terms of the grant will last for 10 years.
- If your grant is £200,000 or more, the terms of the grant will last for 25 years.

Declaration

By signing the declaration, you are confirming that your organisation understands and accepts the standard terms of grant.

The person signing this declaration must be different from the person named as the contact under question 1b and must have the authority to do so.

Appendix 1: Heritage skills

By heritage skills we mean the wide range of practical skills needed to conserve and open up our heritage, for example, but not exclusively:

Across the whole heritage sector:

- Skills to plan, manage and deliver learning programmes for a variety of different audiences
- Community engagement skills, for example, the skills needed to work with under-represented audiences in heritage
- Volunteer management skills in heritage settings
- Interpretation skills, for example, to create engaging and accessible exhibitions
- Skills to manage the impacts climate change will have on heritage or to reduce the carbon footprint of heritage assets.
- Skills to use digital technology in heritage conservation, learning or participation

In natural heritage:

- biological recording skills
- natural green space management, for example coppicing or hedge laying skills
- specialist habitat or species conservation skills (from heathlands to marine environments and from mammals to birds)
- horticultural skills.

In museums, libraries and archives:

- documentation skills
- research and local history skills
- collection conservation skills (including dealing with a wide range of materials from paper to textiles and from metals to ethnographic artefacts).

In the industrial, maritime and transport sector:

- blacksmithing
- boat restoration skills
- engineering skills, for example, skills to maintain steam engines.

In the built environment:

- lead working or roofing
- stone masonry, brickwork or walling
- skills to survey historical buildings
- archaeology field survey or scientific skills
- using lime plaster or pargeting.

In intangible heritage:

- oral history skills.

Appendix 2: Worked cost examples

Cost table	Cost heading	Example 1	Example 2	Example 3
B8	Payments to trainees	£0	£15,000	£25,000
B1	Managing the project	12 months x 15 people £200,000	15 months x 8 people £160,000	3 months x 12 people £60,000 6 months x 20 people £150,000 12 months x 20 people £300,000
B2	Professional fees	£0	£10,000	£30,000
B3	Staff costs	£5,000	£8,000	£10,000
B5 B9	Travel	£10,000	£6,000	£12,000
B6 B7	Recruitment	£5,000	£4,000	£6,000
B10	Expenses	£3,000	£1,000	£8,000
B11	Equipment	£1,000	£1,000	£2,000
B12	Promotion	£2,000	£1,000	£3,000
B13	Evaluation	£1,000	£1,000	£2,000
C1 C2 C3	Your contribution (at least 10% of the total costs of your training plan and your delivery costs)	£5,000	£4,000	£6,000
	Overall costs	£35,000	£40,000	£120,000
	Overall delivery costs not including costs of developing your training plan	£267,000	£251,000	£734,000
	Average costs per 12-month equivalent training placement	£267,000/15 years = £17,800	£236,000/10 years = £23,600	£709,000/33 years = £21,485

Appendix 3: Writing a Skills for the Future Training Plan

Contents

- 1.0 Introduction
- 2.0 The Skills for the Future application process and your training plan
- 3.0 Your training plan
 - 3.1 Section A: Where you are now
 - 3.2 Section B: Your project
- 4.0 Appendix
 - Appendix A: Sources of further information on the heritage workforce.

1.0 Introduction

This guidance is designed to help you prepare your application to Skills for the Future by setting out what we mean by a training plan and what you will need to do if your application is successful.

The training plan is the document in which you will set out the detail of everything you will do in your project, turning the outline proposals in your application into a detailed plan for successful delivery of your programme of training placements. There is specific information you must include in your training plan; this is set out in part 3 of this guidance.

You should read this guidance before you complete the Skills for the Future application form as it will help you decide what development work you will need to do if your application is successful, who will do it, and what it will cost.

We hope that you will be able to carry out most of the work to write your training plan yourself. You may need to employ specialists for some tasks, but the most vital part of the process – making choices that are right for your organisation and your project – can only be done by you.

If your application is successful, you will use this guidance again in the process of developing your training plan.

2.0 The Skills for the Future application process and your training plan

In the Skills for the Future application form we ask you to describe in outline

- what your project will do (section 3);
- what the outcomes of your project will be (section 4);
- who will deliver your project (section 5a);
- the risks to your project (section 5c); and
- the timetable for the first year (section 5d).

If you are successful we will expect you to work up your answers to these questions to include all your project activity in the form of a training plan. We will expect you to follow this guidance in creating your training plan and we will discuss it with you when we agree you can start developing that.

Your training plan is specific to the Skills for the Future project you are asking us to fund; it is not the same as your plans for your everyday work or a general plan for your organisation's training activity. You should only include in your plan training that you will deliver using a Skills for the Future grant.

If you have little experience of doing a project of this type, or on this scale, we may offer you a mentor to support you in developing your training plan.

We will keep in touch with you as your work on the training plan progresses and may ask for progress reports.

You can submit your training plan at any point after our Trustees' decision in May 2010, but we must receive it by 29 October 2010. If we do not receive your plan by then, or judge that it is not of good-enough quality, we will withdraw our grant.

Once you submit your training plan it becomes a statement of the activities you will be delivering as part of your HLF project. We will assess whether it meets the aims and outcomes of the Skills for the Future programme and your application. If we agree your training plan and give you permission to take your project forward, we will monitor your progress against the plan.

3.0 Your training plan

Your training plan should be organised in two sections:

- o Where you are now
- o Your project

3.1 Where you are now

You need to make sure your organisation has the right things in place to help you to deliver your training project. No matter what size organisation you are, you might find other people's experience helpful in developing your project so we are encouraging you to look outside your organisation for ideas.

In Section 1 of your plan you should:

- Summarise your organisation/partnership's commitment to training; refer to key documents;
- Describe what training you or others currently offer, if any;
- Describe any skills shortages that exist and how you know this;
- Summarise what you know about the people who currently have the skills your project will focus on and how you know this;
- Describe the challenges to your organisation in delivering this project, for example, to remove the barriers that people might face in entering a heritage career; and
- Describe what you would like to do to build on good practice in your organisation/partnership.

Also describe how you created your training plan, including: who has been involved in writing it; who has been involved in helping you to develop your ideas; and what you have learnt from your past activities.

Questions to help you think through Section 1:

- Who needs to be involved in the process of creating your training plan?

At application stage it will be helpful to think about the range of people who might help contribute to your plan, including those who can:

- o offer work-based training;
- o assess or accredit training in the work place;
- o deliver additional courses to supplement work place training;
- o volunteer to help deliver your project;
- o help govern, evaluate or disseminate your work.
- Is everything in place to make a training project viable within your organisation?
- What do you know about current skills shortages? If you know of any labour market research, for example, by Sector Skills Councils, heritage organisations or professional bodies in the heritage sector you should summarise it in your training plan. Similarly, if your organisation has produced research that is informing your project, tell us about it. You might have evidence from recruitment campaigns or from commissioning contracts that there is a shortage of people with skills in your area. See Appendix B
- What do you know about the profile of the people who have the skills you want to target with your project?
- What works for other organisations who have delivered training, developed accreditation or targeted the particular social groups you want to reach with your training project?

3.2 Your project

In section 2 of your plan you need to tell us in detail what you will do to meet the outcomes of Skills for the Future and manage your project effectively. To be successful your training plan should address all of the issues below.

3.2.1 What will your project do?

- Set out your project aims which will be realised through the training, evaluation and dissemination activities in your project.
- How do these fit with your policies and organisational or business aims?
- Describe the skills you want to focus on and the reasons why.
- Set out **how many placements** you will create, including their **duration** and **focus**. Tell us the reasons for the length of placements you have chosen to deliver and how the placements will be phased throughout your project, if applicable. Give us as much information as you can about where they will be located or which training providers you will target with your project.

3.2.2 How will your project meet the outcomes of Skills for the Future?

Increasing the range and quality of work-based training:

- Tell us how you will organise the work-based training and your reasons for taking this approach. You should provide information on:
 - how an individual's training will be achieved, for example, by working on a particular project or through placements at a number of different sites;
 - what you will pay the trainees as a bursary or stipend and how you will organise these payments;
 - how you will manage the trainees and what employment status and terms and conditions they will have;
 - what equipment or resources will be supplied to trainees, if applicable;
 - who will deliver the training;
 - how you will manage the relationship between your organisation and the placement provider, if different;
 - how trainees will document their learning and their progress, for example, using personal training diaries, creating portfolios or compiling 'training passports' that record, for example, reports from placements, assessment of work-based projects and qualifications attained;
 - how you will make sure the training is effective and high quality, for example, using specialist trainers who hold relevant training qualifications;
 - how training will be accredited or linked to standards, if applicable;
 - the level at which training will be provided, for example, for school leavers or graduates or to progress people from vocational qualification Level 2 to Level 3;
 - any 'train the trainer' sessions you plan to organise;
 - any additional courses the trainees might require;
 - any trainer or trainee networks or showcase events you plan to organise;
 - the outcomes of the training.
- Tell us how you will support trainees through the transition from the training placement into paid employment or further education or training.
- You will need to break down the costs relating to training, including courses, using an assessment centre or registering with an accreditation organisation in the budget you provide.
- To give them with the best possible experience trainees should expect to receive a personalised, structured training plan which guides and records

their learning through the placement(s).
Provide a sample individual training plan demonstrating how the needs of the trainee will be met and including information, for example, on how they will be inducted, receive performance reviews, receive relevant health and safety training etc. If trainees will use a template to record their progress, attach a copy to your training plan.

- If there will be a **contract or agreement** between the trainee and your organisation and/or the placement provider, provide samples as part of your training plan.
- Provide **role descriptions for placement providers**/hosts/supervisors as applicable.

Skills gaps:

- How does your project meet identified skills gaps or shortages?
- What difference will your project make for heritage?

Supporting the sector, evaluation and dissemination:

- Summarise your measures of success and your plans to evaluate your project, including the experience of the trainees, work-based trainers, and others;
- Set out what will happen once the project is complete to ensure the long-term benefits;
- Set out how your organisation will be different after the project and how you will continue to develop;
- Set out how you will share the lessons of your project. For example, you might produce a website or a film, organise a conference for the sector, run workshops for Sector Skills Council staff and learning providers, or produce case studies.
- You will need to set out in detail what activity you will do, when it will happen and how it will be resourced.

Diversity:

- How will your project help diversify the workforce?
- Which social groups (eg young people, women, career changers) will you target in your project? What are your reasons for choosing them?

You should provide:

- a recruitment strategy for your project staff and/or trainees, as applicable, setting out likely sources of candidates and giving the detail of the selection procedure;
- information on who you would like to reach with your recruitment materials;
- targets for the recruitment of people from particular social groups that are a priority for you.

3.2.3 How will you manage your project?

- Who will lead your project? If you decide to appoint a steering group or an advisory panel, you should tell us about the members, what their role will be and how often they will meet. You will need to include costs for these meetings in your budget.
- Who will manage the project?
- Who else, if anyone, will be involved in delivering the project and what will they do? You will need to think about all of the aspects of delivering your training project and who will do the work, for example:
 - recruiting the training hosts/providers;
 - recruiting the trainees, including organising the recruitment strategy and the selection procedure;
 - scoping the content of the training placements;
 - deciding the terms and conditions of the trainees, establishing what their bursary payment will be and whether it will be exempt from tax;
 - ensuring the trainees are safe in the work place and properly insured;

- o dealing with any disputes between the trainee and placement provider; and
- o administering the project?
- Provide a **structure chart** for the management of your project.
- Provide **job descriptions** for project staff (with salaries), role descriptions for volunteers, and briefs for any freelance workers or consultants.

3.2.4 What will be your budget?

- Provide a **detailed budget** for all your training activities, expanding on section 6 in the application form and giving a full breakdown of costs.

3.2.5 Risk assessment

- You will need to revisit the **risk assessment** you provided in your application and provide an updated and detailed version in your training plan. Your risk assessment should consider all of the things that might go wrong in your project and how you will deal with the risk, for example, losing key staff, trainees dropping out of placements early, complaints by trainees about placement hosts and the quality of training.

3.2.6 Timetable

- Provide a **detailed timetable** for the whole length of your project, updating and expanding the first year timetable you provided in your application.

4.0 Appendix A: Further information on the heritage workforce

The heritage sector is varied and complex and its workforce requires a wide range of skills, many of them specialist. There are a huge number of employers and a wide range of professional bodies with an interest in training and sustaining a qualified workforce. There are at least three employer-led Sector Skills Councils that represent the interests of the heritage sector. Together these organisations have produced a range of research that point to skills gaps in the heritage workforce and highlight issues that need to be addressed to ensure heritage organisations represent the communities they serve. We have gathered here a small sample of the research, reports and other sources published across the heritage sector in the last five years.

Sector Skills Councils

Creative Blueprint (Creative and Cultural Skills, 2008) – strategy reports available for all four countries of the UK

www.ccskills.org.uk/LinkClick.aspx?fileticket=eEaOt5G4J5Q=&tabid=81 (England)

Impact and Footprint reports (Creative and Cultural Skills, updated 2008) – data reports available by country and region

www.ccskills.org.uk/LinkClick.aspx?fileticket=b3rGZNP4FY=&tabid=600 (England)

Skills assessment Report for the Environmental and Land based Sector (Lantra, 2009)

www.archaeologists.net/modules/icontent/inPages/docs/Imi%200708/Archaeology_LMI_report_colour.pdf

Traditional Building Craft Skills Research (National Heritage Training Group, 2008) – separate reports available for the four countries of the UK

www.nhtg.org.uk/nhtginitiatives/publications/research/england2008.aspx#0 (England)

Heritage sector

National Heritage Science Strategy (2009)
www.heritagesciencestrategy.org.uk

Evidence submitted to the Environmental Audit Committee Enquiry into Green Jobs and Skills, 2009

www.parliament.uk/parliamentary_committees/environmental_audit_committee/inqgreenjobs.cfm

Space to Grow (Cabe, 2009)

MLA Workforce Development Strategy (MLA, 2009)

www.mla.gov.uk/what/raising_standards/~/_media/Files/pdf/2009/MLA_Workforce_Position_Statement_2009

Evidence and reports on taxonomy and related skills from the House of Lords Science and Technology Committee (5th Report, Session 2007-08, HL Paper 162)

www.publications.parliament.uk/pa/ld200809/ldselect/ldsctech/58/5801.htm

Archaeology Labour Market Intelligence: Profiling the Profession 2007/08 (Aitchison & Edwards, 2008)

www.archaeologists.net/modules/icontent/inPages/docs/lmi%200708/Archaeology_LMI_report_colour.pdf

Parks Need People (Cabe, 2008)

It's a material world. Caring for the public realm (Demos, 2008)

Culture on Demand. Ways to Engage a Wider Audience (DCMS, 2007)

Profile of the Archives Workforce in England (LLUK, 2007)

2007 Skills Needs Analysis Report - Strengthening the Sector: Training Needs, Accreditation and a Workforce Development Strategy for Museums in the North West (MLA North West, 2007)

Preserve as Found? Architectural Conservators: Education and Training in England (English Heritage and ICON, 2006)

Report and recommendations on the availability of adequate and appropriate traditional materials and professional and craft skills to meet the needs of the built heritage (Historic Environment Advisory Council for Scotland, 2006)

Report on the Botanic & Historic Gardens Skills Research project (Lantra, 2005)

Digital Preservation Coalition Training Needs Analysis Final Report (Joint Information Systems Committee, 2004)

Crafts in the English Countryside: Towards a Future (Countryside Agency, 2004)