

# Application form help notes

This document is designed to help you complete the Resilient Heritage application form. It is intended to be read alongside the Resilient Heritage application guidance and reference copy of the application form.

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There are word limits to some of the answers you may give; these are shown on the online form. The same online form is used across several small grants programmes. These help notes explain exactly what information we are looking for under each question in an application for Resilient Heritage funding.

# Section one: Your organisation

If you have nominated a not-for-profit organisation to apply on your behalf, their details need to appear here.

## 1a. Address of your organisation.

This table will be completed automatically using the information you gave when you registered.

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

Fill in as appropriate.

If identifying the postcode is difficult, provide the address and postcode of the nearest building.

## 1c. Details of the main contact person.

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.

## 1d. The legal status of your organisation.

Fill in as appropriate.

If your type of organisation is not listed, please tick 'other'. This might include a Community Interest Company or a social enterprise. You will also need to tell us about your organisation's capacity by providing information about your staff structure, your governing body and your financial situation. Describe your organisation's main purpose and regular activities.

If you want to use Resilient Heritage funding to set up a new organisation, tell us here.

If you have just started up and don't yet deliver regular activities, tell us here, saying when your organisation was set up and what your plans are for the future.

## 1e. Approximately what percentage of your organisation's regular activities involves looking after or engaging people with heritage?

Thinking of the work your organisation has delivered over the last year, tell us roughly how much of this work accounts for engaging people with, or looking after heritage. See 'What we mean by heritage' in the Resilient Heritage application guidance for more information about this.

If you are setting up a new group, or have just started up, tell us approximately what percentage of your group's activities will focus on heritage in the future.

## 1f. Will your project be delivered by a partnership?

Fill in as appropriate.

Your project may include different types of partners. If any of your partners own land, buildings, or heritage items that are included in the project then you should list them as a formal partner here, and in the Declaration at the end of the application form.

Partner organisations who will only help you deliver parts of the project do not need to be entered on the form but must be included within your signed Partnership Agreement.

## 1g. Are you VAT registered?

Fill in as appropriate.

# Section two: The heritage

## 2a. What is the heritage your organisation focuses on?

Tell us what you know about the heritage you are responsible for, or expect to take ownership of.

Provide a description of the heritage as it is today. If different types of heritage are involved, describe each of these. If your project is about heritage that is not physical (such as memories or cultural traditions), tell us about the subject and the time period it covers.

If your project is about physical heritage (such as a building, ship, collection or nature reserve), give us a summary of the factual information you have about it – its size, when it dates from, the surviving features, its condition and why you think it is important to your local community.

Tell us if you know of any official recognition of this heritage. For example, it may be a listed building (if so, give its grade) or a Site of Special Scientific Interest.

If you are applying on behalf of a group without a constitution or bank account, answer these questions in relation to the heritage they focus on.

# Section three: Your project

## 3a. Describe what your project will do.

Explain what issues or challenges have created the need or opportunity that Resilient Heritage funding will address.

Tell us how you have arrived at your current project proposals and how they meet the need you have identified.

Describe all of the activities to be delivered by the Resilient Heritage project. Focus on the most important things and be as specific as possible. Give numbers, facts and figures where you can.

If you are including costs for support from a mentor, tell us what sort of help you need.

If you are a not-for-profit organisation applying on behalf of a group without a constitution or bank account, explain clearly who are the group's members and their current or proposed activities related to heritage. In this case, tell us who will be responsible for managing the project and who will report to you to enable you to send an End of Grant report.

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**Answer questions 3b–3f as applicable.**

# Section four: Project outcomes

Outcomes are changes, impacts, benefits, or any effects that happen as a result of your project. On this page, we have provided descriptions of outcomes for heritage, people and communities to help you understand the difference we want to make with our funding.

We expect Resilient Heritage to achieve all three of the outcomes we describe here and you must describe how your project will do this.

Referring to these notes, tell us what changes will be brought about as a result of your project.

These outcomes are what you will evaluate the success of your project against, so it's important that they are clear and achievable. Tell us how you will know that your project has made a difference, showing how you will measure the outcomes you tell us about.

## Outcomes for heritage

### As a result of HLF investment: Heritage will be better managed

There will be clear improvements in the way that you manage heritage. This could include the implementation of a new management and maintenance plan, securing additional staff, Trustees or other resources that you need, or the more effective use of existing resources. As a result of these improvements, you will be able to show that the heritage you manage is in a stronger position for the long term including, if appropriate, a stronger financial position. These improvements to managing the heritage are likely to mean that you can meet national or sector quality standards.

## Outcomes for people:

### As a result of HLF investment: People will have developed skills

Individuals involved with your organisation, such as Trustees, staff or volunteers, will have gained skills relevant to ensuring heritage is better looked after, managed, understood or shared (including, among others, strategic and business planning, fundraising, maintenance, and project management skills). As a result of taking part in a structured training activity – for example, an informal mentoring programme, on-the-job training or external short courses – the people involved will be able to demonstrate competence in new, specific skills, and where appropriate, will have gained a formal qualification.

## Outcomes for communities:

### As a result of HLF investment: Your organisation will be more resilient

Your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future. You will achieve this greater resilience through stronger governance and greater local involvement in your organisation; increased management and staff skills; fresh sources of expertise and advice; and working in partnership to share services, staff and resources. You might have new volunteers who increase your capacity and skills; or new sources of income through commercial activity, endowments or new fundraising programmes. You will be able to show that your organisation is stronger and in a better position for the future as a result of the changes you made as part of your project.

**4a. What difference will your project make for heritage?**

Tell us how you will contribute to achieving the following outcome: Heritage will be better managed.

**4b. What difference will your project make for people?**

Tell us how you will contribute to achieving the following outcome: People will have developed skills.

**4c. What difference will your project make for communities?**

Tell us how you will contribute to achieving the following outcome: Your organisation will be more resilient.

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# Section five: After the project ends

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## 5a. Tell us how you will sustain the outcomes after your project ends.

Tell us what you expect to happen after the period of Resilient Heritage funding has come to an end.

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# Section six: Project timetable

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**6a. Tell us when your project will start  
and finish.**

Fill in as appropriate.

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# Section seven: Project costs

## 7a. In this section, tell us how much it will cost to deliver your project.

Fill in as appropriate.

For Resilient Heritage grants up to £10,000 we would not normally expect to see costs against the following headings:

- New staff
- Digital outputs
- Costs of producing learning materials

If you are VAT registered, you should ask HM Revenue & Customs ([www.hmrc.gov.uk](http://www.hmrc.gov.uk)) to check how much value added tax (VAT) you will be able to claim back. If you underestimate costs for VAT, you will have to pay the extra costs.

## 7b. Project income.

Tell us how much funding you expect to receive for this project, splitting the costs between the HLF grant you are applying for from us, and other sources of funding. We do not require that you make a cash contribution.

## 7c. Financial summary.

This section will be completed automatically using information you have provided in other sections.

## 7d. Are there any non-cash contributions or volunteer time to help carry out your project?

Please describe any non-cash contributions that will help you to deliver your project, such as the donation of a venue or in-kind donations.

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# Section eight: Additional information and declaration

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We use information we collect in this part of the form to report on the range of organisations we fund. We will not use this information to assess your application.

When you submit your online form, you are confirming that you have read, understood and agree with the statements set out in the declaration.

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# Section nine: Supporting documents

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

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 constitution (formal rules), unless you are a public organisation or registered charity.\* 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 constitution 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. Briefs for internally and externally commissioned work.

5. 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.
6. Letters of support (no more than six), from other current funders for example.
7. 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.

\* If you have not yet formed your organisation, please send us the constitution and accounts of the organisation that is making the application on your behalf.

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# Appendices

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## Appendix 1: Writing a partnership agreement

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If you are applying as a partnership, you will need to have a simple partnership agreement in place.

You will need to submit this agreement along with your application, and include all the information set out below.

- Name of all partner organisations.
- Contact details of the nominated lead individual within each organisation, along with position within the organisation.
- Partnership start and end dates.
- The role of each partner, and their activity or service description in the partnership.
- How funding will be managed between partners.
- Staff/volunteer time requirements for each partner.
- Activity or service space and equipment requirements.
- How information will be shared between partners.
- What will happen if a partner needs to leave the partnership before the end date of the partnership. (Will there be a notice period?)
- Which partner will take responsibility for monitoring and evaluating your project, and reporting back to us.
- How you will communicate, for example, how often you will meet (if at all), where you will meet and who will organise the meetings.
- How partners will resolve disputes.
- How changes to the agreement will be made.
- Signatures of each partner.

# Glossary

**Direct project costs:** All the costs that are directly incurred as a result of your project.

**Full Cost Recovery:** Full Cost Recovery enables voluntary sector organisations to recover their organisational overheads, which are shared among their different projects.

**Lead applicant:** If you are applying as a partnership, you will need to nominate a lead applicant who will submit the application on behalf of other organisations in the partnership. If the application is successful, the lead applicant will be bound into the terms of grant and receive grant payments.

**Non-cash contributions:** Non-cash contributions can be included in your partnership funding. These are items or services that you receive without charge, for example a donation of materials from a local firm or the use of a room. We only accept non-cash contributions if they are costs we could pay for with cash.

**Outcome:** An outcome is what your project will achieve and the change – for heritage, people or communities – that will be brought about by our investment. For more information on outcomes, read about the difference we want to make in Part one: Introduction, in the Resilient Heritage application guidance.

**Output:** Outputs are the things that your project will produce, such as new strategic or business plan.

**Project completion:** This is the date that we make our final payment and are satisfied that the approved purposes of the grant have been met. The standard terms of grant will normally last for the duration of the project. Exceptions are listed in Part three: Receiving a grant, in the Resilient Heritage application guidance.

**Project enquiry form:** This form allows you to tell us about your project idea before you apply. It was previously known as a 'pre-application form'.

**Volunteer time:** Volunteer time can be included in your partnership funding. This is the time that volunteers give to leading, managing and delivering your project. You should not include costs for the time of people who will take part in your activities, for example, as consultees.