Application form

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

This application form has nine sections, following a summary of your application.

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

Application summary

Name of your organisation

Project title

Project summary

In no more than 150 words, summarise your project. We will use this text to tell people about your project, including our decision takers.

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

Yes / No

If yes: Please tell us who you received advice from

Is this your first application to the Heritage Lottery Fund?

Yes / No

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

Section one: Your organisation

1a. Address of your organisation.

Address
Town/City
County
Post code   *We will use this information to autopopulate the local authority and constituency information below.*

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

Yes / No

If no: Enter the address of your project

Address
Town/City
County
Post code

Local authority within which the project will take place

Constituency within which the project will take place

1c. Details of main contact person.

Name
Position

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

Yes / No

If no: Enter the address of the main contact person

Address
Town/City
County
Post code
Daytime phone number, including area code
Alternative phone number
Email address

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

1e. The legal status of your organisation.

Please select one of the following

Local authority

Other public-sector organisation

Organisation not in the public sector

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

Faith-based or church organisation

Community or voluntary group

Other

If other please specify

For all organisations not in the public sector:

Describe the size and staff structure of your organisation

If applicable, how many board members does your organisation have?

How much did your organisation spend in the last financial year?

What level of unrestricted funds is there in your organisation's reserves?

For all organisations:

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

Company – give registration number

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

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

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

Yes / No

If yes: who are your partners? Please provide a named contact from each organisation

1g. Are you VAT-registered?

Yes / No

If yes: Please provide your VAT number

Section two: The heritage

In this section, tell us about the heritage skills your project focuses on and why they are important.

2a. What are the heritage skills your project focuses on?

Section three: Your project

In this section, tell us about your project. Make sure you include all your planned activities.

3a. Describe what your project will do. We will ask you to describe the difference it will make in Section 4.

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

3c. Why is it essential for the project to go ahead now?

3d. Why do you need Lottery funding?

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

Section four: Project outcomes

In this section, tell us about the difference that your project will make.

4a. Do not answer this question. This is a generic form used across several HLF programmes, meaning not all questions are relevant to Skills for the Future.

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

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

4d. How many people will be trained as part of your project?

4e. How many full-time equivalent volunteers do you expect to contribute personally to your project?

4f. How many full-time equivalent posts will you create to deliver your project?

Section five: Project management

In this section, tell us how you will develop and deliver your project.

Development phase

5a. What work will you do during the development phase of your project?

5b. Who are the main people responsible for the work during the development phase of your project?

5c. Complete a detailed timetable for the development phase of your project.

Activity	Start date	End date	Who will lead this activity
Training plan			

5d. Tell us about the risks to the development phase of your project and how they will be managed.

Risk	Likelihood	Impact	Mitigation	Who will lead on this
	High / Medium / Low	High / Medium / Low		

Delivery phase

5e. Who are the main people responsible for the work during the delivery phase of your project?

5f. Complete a summary timetable for the delivery phase of your project.

Activity	Start date	End date	Who will lead this activity

5g. Tell us about the risks to the delivery phase of your project and how they will be managed.

Risk	Likelihood	Impact	Mitigation	Who will lead on this
	High / Medium / Low	High / Medium / Low		

5h. When do you expect the delivery phase of your project to start and finish?

Project start date: Project finish date:

Section six:
After the project ends

In this section, tell us about what will happen once your project has been completed.

6a. How will you maintain the outcomes of your project after the grant ends?

6b. How will you evaluate the success of your project from the beginning and share the learning?

Section seven: Project costs

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

7a. Development-phase costs.

Cost heading	Description	Cost (£)	VAT (£)	Total (£)
Professional fees				
New staff costs				
Recruitment				
Other				
Full Cost Recovery				
Contingency				
Non-cash contributions				
Volunteer time				
Total				

7b. Development-phase income.

Source of funding	Description	Secured?	Value (£)
Local authority			
Other public sector			
Central government			
European Union			
Private donation – individual			
Private donation – trusts/charities/ foundations			
Private donation – corporate			
Commercial/ business			
Own reserves			
Other fundraising			
Non-cash contributions			
Volunteer time			
HLF grant request			
Total			

7c. Development-phase financial summary.

Total development costs	
Total development income	
HLF development-grant request	
HLF development grant %	

7d. Delivery-phase capital costs.

We would not expect to see any costs in this section unless you are delivering some digital outputs.

7e. Delivery-phase activity costs.

Cost heading	Description	Cost (£)	VAT (£)	Total (£)
New staff costs				
Training for staff				
Paid training placements				
Training for volunteers				
Travel for staff				
Travel and expenses for volunteers				
Equipment and materials				
Other				
Professional fees relating to the above				
Total				

7f. Delivery phase – other costs.

Cost heading	Description	Cost (£)	VAT (£)	Total (£)
Recruitment				
Publicity and promotion				
Evaluation				
Other				
Full Cost Recovery				
Contingency				
Inflation				
Non-cash contributions				
Volunteer time				
Total				

7g. Delivery-phase income.

Source of funding	Description	Secured?	Value (£)
Local authority			
Other public sector			
Central government			
European Union			
Private donation – individual			
Private donation – trusts/charities/ foundations			
Private donation – corporate			
Commercial/ business			
Own reserves			
Other fundraising			
Non-cash contributions			
Volunteer time			
HLF grant request			
Total			

7h. Delivery-phase financial summary.

Total delivery costs	
Total delivery income	
HLF delivery-grant request	
HLF delivery grant %	

7i. If cash contributions from other sources are not yet secured, how do you expect to secure these and by when?

7j. If you have included Full Cost Recovery, how have you worked out the share that relates to your project?

Section eight: Additional information and declaration

This part of the form aims to collect the information we need to report on the range of organisations we fund. We will not use this information to assess your application. We encourage you to be as specific as possible about the people your organisation represents. If your organisation represents the interests of a particular group, such as young people or disabled people, tell us which by filling in the tables below.

If you are based in Northern Ireland, where legislation requires us to report in detail on the organisations we fund, please complete the tables in full, as applicable.	If you are based outside Northern Ireland and your organisation represents the interests of a wide range of people and not any particular group, mark this box only ☐

Age

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

Disabled people

Disabled people

Ethnicity

Asian	Black	Chinese	Mixed	White
Asian British	Black British	Chinese British	White and Black Caribbean	White British
Asian English	Black English	Chinese English	White and Black African	White English
Asian Irish	Black Irish	Chinese Irish	White and Asian	White Irish
Asian N Irish	Black N Irish	Chinese N Irish	Other	White N Irish
Asian Scottish	Black Scottish	Chinese Scottish		White Scottish
Asian Welsh	Black Welsh	Chinese Welsh		White Welsh

heritage lottery fund

Bangladeshi	Caribbean	Other		Other
Indian	African		Arab	
Pakistani	Other			
Other			Irish travellers (Northern Ireland only)	

Marital or civil-partnership status

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

People with dependants

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

People in lower socio-economic groups

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

Community background (Northern Ireland only)

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

Religious belief

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

Gender

Males	Females	Transgender people

Sexual orientation

Gay and lesbian people	Heterosexual people	Bisexual people

Declaration

Terms of Grant

You must read the standard terms of grant for this programme on our website.

By completing this Declaration, you are confirming that your organisation accepts these terms. For partnership projects, all partners must confirm that they accept the standard terms of grant by adding a contact at the end of the declaration.

Freedom of Information and Data Protection

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

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

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

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

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

Continued...

Declaration (continued)

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

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

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

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

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

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

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

I confirm that I agree with the above statements.

☐ Yes

☐ No

Name _____

Organisation _____

Position _____

Date _____

Are you applying on behalf of a partnership?

☐ Yes

☐ No

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

Section nine: Supporting documents

Please provide all of the documents listed at each round, unless they are not applicable to your project. You will be asked to indicate how you are sending these documents to us – as hard copy or electronically.

First round

1. Copy of your organisation's constitution, unless you are a public organisation.

   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, signed by everyone involved, setting out how the project will be managed.

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

4. Spreadsheet detailing the cost breakdown in **Section seven: Project costs**.

5. Calculation of Full Cost Recovery included in your development-phase costs (if applicable).

6. Briefs for development work for internally and externally commissioned work.

7. Job descriptions for new posts to be filled during the development phase.

Second round

1. A training plan including cash flow for the project, a timetable, and the project management structure.

2. Spreadsheet detailing the cost breakdown in **Section seven: project costs**.

3. Calculation of Full Cost Recovery included in your delivery-phase costs (if applicable).

4. Briefs for internally and externally commissioned work.

5. Job descriptions for new posts to be filled.

6. Business plan for the lead organisation.