



# Grants for Places of Worship, England

Grants from £10,000 to £250,000

## Application guidance



# Contents

<b>Part one: Introduction</b>	<b>3</b>
Welcome	3
Help we offer	3
Who we fund	4
What we fund	4
The difference we want to make	6
Costs we can cover	7
Your contribution	7
VAT	8
Other sources of funding	8
Other information about your application	8
<b>Part two: Application process</b>	<b>9</b>
Making an application	9
First-round application and second-round submission	10
Your development phase	11
How we assess applications	12
How decisions are made	12
<b>Part three: Receiving a grant</b>	<b>13</b>
Terms of grant	13
Acknowledgement	13
Images	13
Mentoring and monitoring	13
Permission to start	13
Grant payment	14
Buying goods, works and services	14
Insuring works and property	15
Evaluation	15
<b>Part four: Application form help notes</b>	<b>16</b>
Section one: Your organisation	16
Section two: The heritage	17
Section three: Your project	18
Section four: Project outcomes	20
Section five: Project management	23
Section six: After the project ends	25
Section seven: Project costs	26
Section eight: Additional information and declaration	31
Section nine: Supporting documents	32
<b>Appendices</b>	<b>33</b>
Appendix 1: Evaluation questionnaire	33
Appendix 2: Property ownership	34
Appendix 3: Digital outputs	35
Appendix 4: Reducing negative environmental impacts	36
Appendix 5: Activity statement	37
Appendix 6: Letter of support	40
Appendix 7: English Heritage technical advice service	41
<b>Glossary</b>	<b>42</b>

# Part one: Introduction

## Welcome

The Grants for Places of Worship programme is for projects that involve urgent structural repairs to public places of worship that are listed at grade I, II\* or II. As part of a repair project we can also fund work to encourage greater community use and engagement. You can apply for a grant from £10,000 to £250,000. The application process is in two rounds.

### About this guidance

This guidance will help you decide whether this is the right programme for you, as well as providing you with the information you'll need to plan an application at both the first and second rounds.

Read **Part one: Introduction** and **Part two: Application process** to find out about what we fund and how to apply.

**Part three: Receiving a grant** tells you about how we will work with you if you receive a grant.

**Part four: Application form help notes** provides information to help you answer each of the questions on the application form.

The **appendices** expand on our requirements for certain types of projects, and we have defined some of the terms we use in a **glossary** at the back.

## Help we offer

### Project enquiry service

Please tell us about your idea by submitting a project enquiry form online. Staff in your local HLF office will get in touch within 10 working days to let you know whether your project fits this programme and to provide support with your application. Information submitted as part of a project enquiry is not used in the assessment of an application.

We recommend that you read **Parts one and two** of this Grants for Places of Worship application guidance before sending us your project enquiry.

We also provide a range of resources designed to help you plan your heritage project, and examples of projects that have successfully achieved outcomes for heritage, people and communities. You can find these online.

## Who we fund

Under this programme, we fund applications from all faith groups and denominations which are responsible for maintaining and repairing their place of worship. In order to apply, you must be a formally constituted organisation (governed by a set of rules, known as a constitution).

## What we fund

Under this programme, we fund projects that repair listed places of worship that are currently used for worship at least six times a year. Our priority for this programme is to support structural repairs urgently required **within the next two years** that have been clearly identified and defined in a condition survey such as a Quinquennial Inspection.

When we say a **project**, we mean work or activity that:

- is defined at the outset;
- has not yet started;
- will take no more than three years to complete;
- will contribute towards achieving the outcomes we describe.

We expect the repair work to be carried out in a single contract. Large projects will need to be tackled in phases, with each individual contract programmed according to the urgency of the repairs. In very exceptional circumstances, we may consider larger projects requiring a grant of more than £250,000 if it is clear that you cannot divide the work and all the repairs are equally urgent (for example, a project to rebuild a spire in a single phase of work). Please talk to us before making an application if you think this is the case.

This programme is also designed to encourage more people and a wider range of people to take an interest in your place of worship and to help care for it in the future. We hope to achieve this by finding new ways in which your place of worship can be used by the wider community beyond the primary function of worship and/or by providing new opportunities for people to find out about the heritage of your place of worship.

We will therefore fund new capital works, such as toilets or kitchens, improvements to heating or electrical systems, other works to improve energy efficiency, and works to assist with the on-going maintenance of the place of worship.

The new works should cost no more than 15% of the total overall project costs and should take place in the main place of worship and not in an ancillary building, such as a church hall. **This is not a mandatory requirement. We will only fund new works if you can demonstrate that they are necessary to encourage more people to visit and use your place of worship. We will not fund new works that are intended to only benefit the existing congregation and other users. You can still apply for a grant without undertaking new capital works.**

Both repairs and any new work should be carried out in a way that respects the historic character of the building and the features that give it its historic or architectural significance.

**We expect all projects to include works that help the heritage of your place of worship to be more widely understood.** We will fund activities and materials, including digital applications or outputs, to engage people with the heritage of your place of worship, such as new interpretation leaflets, websites or guidebooks, or holding talks or guided tours.

To help you establish exactly what repairs your place of worship will need, or whether the proposals for new facilities or improvements to the heating or lighting system are suitable, we can contribute towards costs during your development phase such as:

- structural investigation, including access and opening-up work;
- specialist reports;
- conservation-based research, analysis and recording.

To help us prioritise our funding, we will ask for a letter of support from the person with overall responsibility for your place of worship. For more information, see **Appendix 6: Letter of support**.

The assessment process is competitive and we cannot fund all of the good-quality applications that we receive. As a guide, the following projects are unlikely to win support under this programme:

- projects outside the UK;

- projects that promote the cause or beliefs of political or faith organisations;
- projects that involve works to:
  - faith buildings that are no longer used for regular worship;
  - unlisted places of worship;
  - privately owned places of worship;
  - chapels in schools, hospitals or other institutions;
  - nunneries or monasteries;
  - buildings used by a minister of religion totally or mainly as their home;
  - work to church halls or other premises used by the place of worship;
  - Anglican or Roman Catholic Cathedrals.

If your project is unlikely to be supported under this programme, then you may be able to apply for a grant under another of our programmes. Ask your local HLF team for advice.

## The difference we want to make

We describe the difference we want to make to heritage, people and communities through a set of outcomes. These are drawn directly from our research into what projects have actually delivered.

Applications under this programme are expected to achieve two outcomes. In assessment, we will put more weight on how well the project achieves the first outcome. In order to achieve the second outcome, your project will need to provide new activities, or ways of engaging with the heritage of your place of worship. In assessing this outcome we will also take into account any existing opportunities for people to engage with the heritage of your place of worship.

We provide detailed descriptions of these outcomes in **Section four: Project outcomes** in **Part four: Application form help notes**. These tell you what changes we want to bring about with our funding, and include some suggestions of how you can measure them.

### Outcomes for heritage:

**W** Weighted

With our investment, heritage will be:

- in better condition **W**

### Outcomes for communities:

With our investment:

- more people and a wider range of people will have engaged with heritage.

## Costs we can cover

### Direct project costs

Your application should include all costs that are directly incurred as a result of the project.

Direct project costs include:

- professional fees;
- capital work;
- activities to engage people with heritage;
- evaluation; and
- promotion.

Direct project costs do not include:

- the cost of existing staff time, (unless you are transferring an existing member of staff into a new post to deliver the project); or
- existing organisational costs.

Please read about our requirements for **buying goods, works and services** in **Part three: Receiving a grant**. In particular, you will need to take account of our requirements for procuring a conservation accredited lead architect or building surveyor.

### Full Cost Recovery

For voluntary organisations, we can also accept part of an organisation's overheads (sometimes called 'core costs') as a part of the costs of the project. We expect our contribution to be calculated using Full Cost Recovery. We cannot accept applications for Full Cost Recovery from public sector organisations, such as government-funded museums, local authorities or universities.

Your organisation's overheads might include overall management, administration and support, or premises costs that relate to the whole organisation. Under Full Cost Recovery we can cover a proportion of the cost of an existing member of staff, as long as they are not working exclusively on the project.

Recognised guidance on calculating the Full Cost Recovery amount that applies to your

project is available from organisations such as the Association of Chief Executives of Voluntary Organisations (ACEVO) ([www.acevo.org.uk](http://www.acevo.org.uk)) and Big Lottery Fund ([www.biglotteryfund.org.uk](http://www.biglotteryfund.org.uk)). You will need to show us how you have calculated your costs, based on recent published accounts. You will then need to tell us on what basis you have allocated a share of the costs to the project you are asking us to fund, and we will assess whether this is fair and reasonable.

## Your contribution

We ask you to make a contribution towards your project. We describe this as 'partnership funding' and it can be made up of cash, volunteer time, non-cash contributions, or a combination of all of these. Some of your partnership funding must be from your own organisation's resources.

The value of increased future costs of management and maintenance for up to five years after practical completion can be included as partnership funding. This cannot be used as your only partnership funding contribution from your own resources.

You must contribute at least 5% of the costs of your development phase and 5% of the costs of your delivery phase.

### Chancel Repair Liability

For some Church of England buildings, a lay rector may be responsible for work to the chancel. This is known as Chancel Repair Liability (CLR).

When we assess your need for a grant, we will look at the value for money your application offers and your financial needs in developing plans for the long-term sustainable use of the building. We will also be realistic about your ability to fundraise, and therefore we will not encourage you to pursue CLR as partnership funding on occasions where it is evidently unreasonable for you to do so.

For more information on CLR and your responsibilities, see [www.churchofengland.org](http://www.churchofengland.org)

## VAT

The Listed Places of Worship Grant Scheme (LPW) will give you a grant for the actual amount you spend on VAT on eligible repairs, maintenance and approved alterations to listed places of worship, as well as professional fees directly relating to these works. You should enter the amount you expect to reclaim from the LPW grant scheme as partnership funding on your application form. We will expect you to make a claim to this scheme.

You can get more details about the scheme from:

Listed Places of Worship Grant Scheme  
PO Box 609  
Newport  
NP10 8QD  
[www.lpwscheme.org.uk](http://www.lpwscheme.org.uk)

## Other sources of funding

English Heritage will not grant-aid any project eligible under this scheme. However, if you do not want to apply for lottery funding for moral reasons, English Heritage may consider an application for urgent repair works to a place of worship if it meets all their funding criteria. You should contact your local English Heritage office for more information on the funding available.

<http://www.english-heritage.org.uk/about/contact-us/>

If you need advice on other sources of funding, we recommend the following publications:

- *The Directory of Grant-Making Trusts*

Published by the Directory of Social Change

Phone: 08450 77 77 07

Website: [www.dsc.org.uk/publications](http://www.dsc.org.uk/publications)

Also available online at: [www.trustfunding.org.uk](http://www.trustfunding.org.uk)

- *Funds for Historic Buildings: A Directory of Sources*

Published by the Architectural Heritage Fund.

Website: [www.ffhb.org.uk](http://www.ffhb.org.uk)

- *Fundraising for your Church Building*

Website: [www.churchcare.co.uk](http://www.churchcare.co.uk)

(Although this is aimed at Church of England congregations, it has useful information which applies widely.)

- *The UK Church Fundraising Handbook*, by Maggie Durran

Published by Canterbury Press

Website: [www.scm-canterburypress.co.uk](http://www.scm-canterburypress.co.uk)

## Other information about your application

### Freedom of information and data protection

We are committed to being open about the way we will use any information you give us as part of your application. When you submit your declaration with your application form you are confirming that you understand our obligation to comply with our freedom of information responsibilities and the Data Protection Act 1998.

### Complaints

If you want to make a complaint about HLF, we have a procedure for you to use. This is explained in *Making a complaint*, a document available on our website. Making a complaint will not affect, in any way, the level of service you receive from us. For example, if your complaint is about an application for funding, this will not affect your chances of getting a grant from us in the future.



# Part two: Application process

## Making an application

Grants for Places of Worship applications go through a two-round process. This is so that you can apply at an early stage of planning your project and get help in working out the scope of the work that you need to undertake before you send us your proposals in greater detail.

- First-round applications can be submitted by the published quarterly deadlines which can be found on our website. We assess your application in three months and then it goes to the next decision meeting.
- To help us in our assessment, an advisor from English Heritage may visit your project to assess the repair need at your place of worship, and the urgency of the works compared to other applications.
- If you are awarded a first-round pass, you may take up to 12 months to develop your second-round submission.
- We will assess your second-round submission in three months and give you a decision.
- Read about **how decisions are made** for more details.

Your total grant request is the combined total of your development-grant request and your delivery-grant request.

### First-round application

You submit your first-round application with your delivery-grant request and, if needed, a development-grant request.



### Development phase

If you are successful, you enter your development phase and develop your second-round submission, using the development grant you may have requested.



### Second-round submission

You submit your second-round submission within a year of your first-round pass together with your delivery-grant request.



### Delivery phase

If we confirm your grant, you enter your delivery phase and start your project using your delivery grant.

## First-round application and second-round submission

The table below shows the different levels of information required in a first-round application and a second-round submission.

Information about	First-round application	Second-round submission
<b>Activities</b>	<p><b>Outline</b> proposals:</p> <ul style="list-style-type: none"> <li>Who is your project likely to involve</li> <li>The nature and range of activities that will engage people with heritage</li> </ul>	<p><b>Detailed</b> proposals:</p> <ul style="list-style-type: none"> <li>An activity statement giving details of the additional activities you will undertake to engage people with the building; who will benefit; how much it will cost; a timetable for implementation and how the outcomes will be measured</li> </ul>
<b>Capital work</b>	<p><b>Outline</b> proposals:</p> <ul style="list-style-type: none"> <li>A breakdown of the repair work you plan to deliver, reflecting the professional reports included in your supporting documents</li> <li>An initial breakdown of any other capital work</li> <li>Plans for architectural elements up to and including RIBA work stage 1 (or old RIBA work stage B)*</li> <li>Plans for non-architectural elements, such as interpretation or digital outputs, at the equivalent of RIBA work stage 1 (or old RIBA work stage B)</li> </ul>	<p><b>Detailed</b> proposals:</p> <ul style="list-style-type: none"> <li>Detailed plans and proposals for capital work you plan to deliver</li> <li>Plans for architectural elements up to and including RIBA work stage 4 (or old RIBA work stage H)</li> <li>Plans for non-architectural elements, such as interpretation or digital outputs at the equivalent of RIBA work stage 3 (or old RIBA work stage D)</li> </ul>
<b>Project outcomes</b>	<p><b>Outline</b> information about the outcomes your project might achieve</p>	<p><b>Detailed</b> information about the outcomes your project will achieve</p>
<b>Project management</b>	<ul style="list-style-type: none"> <li>Proof of any relevant statutory and ecclesiastical permissions for work during your development phase (if needed)</li> <li><b>Detailed</b> information about the work you will do during your <b>development</b> phase including briefs for any consultants where appropriate</li> <li><b>Detailed</b> timetable for your <b>development</b> phase</li> <li><b>Outline</b> information about how you will manage your <b>delivery</b> phase</li> <li><b>Outline</b> timetable for <b>delivery</b> phase</li> </ul>	<ul style="list-style-type: none"> <li><b>Detailed</b> information about how you will manage your <b>delivery</b> phase</li> <li><b>Detailed</b> timetable for your <b>delivery</b> phase</li> <li>(Proof of the relevant statutory and ecclesiastical permissions will be required before you receive your permission to start)</li> </ul>
<b>After the project ends</b>	<p><b>Outline</b> information about how you will sustain the outcomes of your project after funding has ended, including funding additional running costs</p>	<ul style="list-style-type: none"> <li><b>Detailed</b> information about how you will sustain the outcomes of your project after funding has ended, including funding additional running costs</li> <li><b>Detailed</b> information about how you will evaluate your project</li> <li>A management and maintenance plan</li> </ul>
<b>Project costs</b>	<ul style="list-style-type: none"> <li><b>Detailed</b> costs for your <b>development</b> phase</li> <li><b>Outline</b> costs for your <b>delivery</b> phase</li> <li>Possible sources of partnership funding for your <b>delivery</b> phase and/or a fundraising strategy for your development phase</li> </ul>	<ul style="list-style-type: none"> <li><b>Detailed</b> costs for your <b>delivery</b> phase</li> <li>Bill of quantities and tender drawings</li> <li>Breakdown of the works we will fund and any works that we are not funding</li> <li>Proof of secured partnership funding</li> </ul>

\*For more information about RIBA work stages, see [www.ribaplanofwork.com/PlanOfWork.aspx](http://www.ribaplanofwork.com/PlanOfWork.aspx)

## Your development phase

We understand that your project proposal may change as a result of the consultation, detailed design and planning, and survey work that you do during your development phase.

### Development review

We will review your project during your development phase to see how you are progressing with any investigative and preparatory work and the relevant documents.

We will expect to review the specification for the works, and the associated drawings, before you go to tender, and to review the tender documents at the second-round submission.

## Guidance

Whilst planning your development phase, you are advised to read:

- *Activity plan guidance.*

This will help you think about planning your activity statement.

You should also read:

- *Management and maintenance plan guidance.*

This will help you write your management and maintenance plan.

All of these documents can be found on the Heritage Lottery Fund (HLF) website: [www.hlf.org.uk](http://www.hlf.org.uk)

## Additional guidance

If your project involves new work to your place of worship, you may find it helpful to read the English Heritage publication *New Work in Historic Places of Worship* (product code 51742) available from the English Heritage website, or from their customer services department on 0870 3331181.

### Key tasks to carry out during your development phase:

1. Undertake any specialist surveys, investigative work or monitoring work required to establish the extent of any repairs, or suitability of new works.
2. Think about how you can open up your place of worship to more people in the community and develop a programme of activities to engage people with heritage. This will feed into your activity statement.
3. Obtain any relevant denominational or statutory consents, approvals or permissions for your proposals. If your development phase involves capital work, you will need to have approvals in place before you carry out this work.
4. Develop **detailed timetable, costs and cash flow** for your delivery phase.
5. Consider how you will **sustain project outcomes** after funding has ended, and how you will meet any additional running costs. This will feed into your management and maintenance plan.
6. Consider how you will **evaluate your project**, and collect baseline data so that you can measure the difference your project makes.
7. Consider how you will **buy goods, works and services** during your delivery phase.
8. Consider how you will **acknowledge our grant**.
9. Undertake the work necessary to produce all relevant **supporting documents** (see **Section nine: Supporting documents** in **Part four: Application form help notes**) for your second-round submission.

## How we assess applications

When we assess your first-round application and second-round submission, we will consider the following:

- What is the heritage of the place of worship, why is it important and who is it important to?
- Is the repair work urgently required within two years?
- What are the needs or opportunities that the project is responding to?
- Why does the project need to go ahead now and why is Lottery funding needed?
- What outcomes will the project achieve?
- Is the project well planned?
- Is the project financially realistic?
- Will the project outcomes be sustained after the project has ended?

## How decisions are made

Your application will be in competition with other projects at the first round.

Our decision makers use their judgement to choose which applications to support, taking account of quality and value for money.

First-round applications are decided on by local Committees four times each year; normally in March, June, September and December.

If your first-round application is successful, we will tell you what grant we are likely to offer towards your delivery phase. We may also give you a grant towards your development costs.

Your second-round submission will normally be approved by the Head of Heritage Lottery Fund in your local area. In some instances it may go to the HLF Committee for your local area.

# Part three: Receiving a grant

## Terms of grant

If you are awarded a grant, you will need to comply with our terms of grant, which you can see on our website.

**We will expect you to open your place of worship for at least 40 days each year outside of the regular hours of worship.**

If you are awarded a grant of up to £250,000, the terms of the grant will last from the start of the project until **10 years after project completion.**

If you are awarded a grant of more than £250,000, the terms of the grant will last from the start of the project until **20 years after project completion.**

## Acknowledgement

We want people to know that the National Lottery has supported your project through HLF. If you are awarded a grant, you must acknowledge our funding using a grantees' acknowledgement logo, both during the delivery of your project and after its completion. We will give you guidance on this and can provide some acknowledgement materials free of charge.

## Images

If you are awarded a grant, you will also need to send us images of your project. We would prefer to receive these as high-resolution digital images.

You give us the right to use any images you provide us with. You must get all the permissions required before you use them or send them to us.

## Mentoring and monitoring

When you are awarded a grant, we may contact you about arranging a start-up meeting. At this meeting you may be introduced to a mentor who will support you in developing or delivering specific aspects of your project, or a monitor who will help review risks. We will review your project at suitable stages.

## Permission to start

If you are awarded a grant, you will need to have our written permission before you start any work on your development phase or your delivery phase. In order to grant you permission to start, you will need to provide us with:

- proof of partnership funding. We may exceptionally consider a realistic fundraising plan instead;
- proof of ownership/leasehold requirements, if relevant (see **Appendix 2: Property ownership**);
- proof of any necessary faculty or other ecclesiastical permissions you might need for the development work
- details of other statutory permissions required and obtained;
- detailed timetable or work programme;
- cost breakdown and cashflow;
- detailed Project Management structure;
- method of buying goods, works and services;
- your bank account details.

## Grant payment

When you are awarded a grant, we will calculate the percentage of cash that we are contributing towards the project. We describe this as the 'payment percentage'.

**For both development and delivery grants,** we pay your grant in three instalments. We will give you 50% of the grant up-front, then 40%, and then 10% once you have finished.

At your start-up meeting we will discuss with you when your requests for payment are likely to be made.

We will retain the last 10% of your delivery grant until we are satisfied that the project is complete and necessary evidence has been provided.

## Buying goods, works and services

Procedures to recruit consultants and contractors must be fair and open and keep to the relevant equality legislation. In all applications regardless of level of funding we will ask you to give us details of the procurement (buying), tendering and selection process for all parts of your project.

If you are unsure about your obligations, we advise you to take professional or legal advice. If you have already procured goods, works or services, you will need to tell us how you did it. We cannot pay your grant if you have not followed the correct procedure.

You must get at least three competitive tenders or quotes for all goods, work and services worth £10,000 or more (excluding VAT) that we have agreed to fund.

For all goods, works and services worth more than £50,000 (excluding VAT), you must provide proof of competitive tendering procedures.

Your proof should be a report on the tenders you have received, together with your decision on which to accept. You must give full reasons if you do not select the lowest tender.

Your project may be covered by European Union (EU) procurement rules if it exceeds the thresholds noted below. This will require that all services for both fees and construction will need to be tendered through Tenders Direct, previously known as Official Journal of the European Union (OJEU).

If you are a non-public body, and your HLF grant exceeds 50% of the estimated cost of a contract, or the HLF grant together with other public funding exceeds 50% (e.g. ERDF, local authority, or other lottery distributors), and exceeds the thresholds noted below, you must adhere to EU Procurement Regulations.

The applicable thresholds can be found on the Cabinet Office website. Thresholds are reviewed annually in January. If you are a public body, different thresholds apply, and you will have to comply with those that are already relevant to you.

The thresholds apply to all individual consultant appointments (or to the aggregate fee as a single appointment) and to construction works.

### **All staff posts must be advertised, with the following exceptions:**

- If you have a suitably qualified member of staff on your payroll that you are moving into the post created by your HLF project. You will need to provide a job description for this post.
- If you have a suitably qualified member of staff on your payroll whose hours you are extending so that they can work on the project. In this case we will fund the cost of the additional hours spent on the project and you will need to tell us about the role they will undertake.
- If you are a voluntary organisation and are including a proportion of a staff member's time in your Full Cost Recovery calculation.

If you are looking to recruit a consultant or member of staff for your development phase and your delivery phase, you should make sure their contract clearly states that this is the case, and allow for break clauses (in case your second-round application is unsuccessful). If you do not, we may ask you to re-recruit after the second-round decision has been made.

**We will only provide a grant if your project is led by an architect or chartered building surveyor who has conservation accreditation from a recognised body.** We currently accept:

- architects listed on the Register of Architects Accredited in Building Conservation (AABC) at category 'A' or the RIBA Conservation Register at Specialist Conservation Architect or Conservation Architect levels; and
- chartered building surveyors listed on the RICS Building Conservation Accreditation Register.

## Insuring works and property

We need to protect Lottery investment and so we ask you, with your contractors, to take out insurance for any property, works, materials and goods involved. All of these must be covered for their full reinstatement value against loss or damage, including inflation and professional fees. If your project is affected by theft, fire, lightning, storm or flood to the extent that you cannot achieve the outcomes set out in your application, we may have to consider claiming back our grant payments.

## Evaluation

We recommend you build in evaluation from the beginning of your project. You can include the cost of this in your budget. At the end of your project we will expect some evaluation feedback, in two parts:

1. You must send us an **evaluation report** before we pay the last 10% of your grant.
2. We will send you an **evaluation questionnaire** within one year of the completion of your project. It will ask for information on the numbers of activities undertaken, the number of visitors you have received (where appropriate), the amount of training and volunteer involvement in your project, and any extra staff you have taken on. For all of these 'outputs' of your project, we will be interested in the types of people that have benefited as well as the overall numbers. We will ask for some of this information again, five years after project completion and 10 years after project completion.

Please see **Appendix 1: Evaluation questionnaire** for an outline of the quantitative information you will need to collect during your project. These numbers will not, on their own, tell the whole story of what your project is about, and your evaluation report will need to go 'beyond the numbers.'

We also carry out our own programme evaluation research and may ask you for additional information on your project outcomes as part of that work.

# Part four: Application form help notes

We use one application form for all of our grant programmes, so not all the questions are relevant to Grants for Places of Worship. We state which questions you do not need to answer below.

**First-round applicants:** In order to plan your development phase, you need to understand what information is required with your second-round submission. You should therefore read the help notes for first-round applications **and** second-round submissions.

**Second-round applicants:** As part of your development phase, you will have produced a range of documents to support your second-round submission, which you will need to send us. You will not need to fill in all parts of the application form (see below).

There is a word limit for your application of 9,000 words in total. There are also word limits to some of the answers you may give; these are shown on the online form.

Please ensure that your project title includes the name and location of your place of worship.

## Section one: Your organisation

### 1a. Address of your organisation.

Include your full postcode. This is the organisation which has legal responsibility for repairs to your Place of Worship.

### 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 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. Describe your organisation's main purposes and regular activities.

If your place of worship is part of the Church of England, give the name of your Diocese; otherwise tell us the name of your congregation's regional or national authority with overall responsibility for your place of worship. Or tell us if your place of worship is fully independent. Tell us about the day-to-day business of your place of worship.

- Tell us the number of people that attend on the main day of worship.
- Give the number of members in your congregation and what you have based this figure on (for example the electoral roll or other equivalent membership list).
- List any community groups that use the building regularly.
- List any other activities that take place in the building (such as educational visits and concerts).



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

Fill in as appropriate.

- In most cases, you will need to select the box entitled 'organisation not in the public sector'. This will display the option 'Faith based or church organisation'.
- You will need to tell us about the size and staff structure of your place of worship, the amount spent in the last financial year, and the level of unrestricted funds in the reserves.

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

Fill in as appropriate.

If you are applying as a partnership, there must be a lead applicant.

## 1g. Are you VAT-registered?

Fill in as appropriate.

## Section two: The heritage

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

#### First round

Describe the place of worship as it is today.

- Tell us:
  - what faith or denomination it is;
  - the form of the building, the different phases of building and how it has changed over time;
  - what is important about your place of worship and who it is important to, such as the local community or special interest group.
- Send us the location plan of your place of worship.
- Send us a Statement of Significance, or a conservation statement, if you have one.

#### Second round

Add information in line with any further research you have carried out during your development phase.

### 2b. Is your heritage considered to be at risk? If so, please tell us in what way.

#### First round

Briefly explain why your heritage is under threat, and what actions you have been able to take (if any) to minimise this risk.

- Tell us if your place of worship is on a buildings or monuments at risk register.
- Tell us if there are any other factors that cause your place of worship to be at risk.
- Refer us to photographs that clearly demonstrate the specific repair needs of the building.
- Refer to the urgent repair needs that are set out in the Quinquennial Inspection report or other condition survey.

#### Second round

Add information in line with any further research you have carried out during your development phase.

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

Fill in as appropriate. We will not fund an application under this programme if no capital works are involved.

- Tick the box appropriate for the grade of your place of worship.

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

We will not fund acquisitions under this programme. Tell us if you own the place of worship. See **Appendix 2: Property ownership** for more information.

## Section three: Your project

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

#### First round

- Provide outline information about what you will do during your delivery phase.
- Provide us with an initial breakdown of the types of capital work you plan to deliver, such as:
  - the urgent structural repairs you intend to carry out;
  - installing new facilities, such as a kitchen area or toilets;
  - carrying out work to upgrade heating or electrical systems or other works to improve energy efficiency;
  - carrying out work to make it easier to maintain the buildings, such as installing ladders, or inspection hatches.
- Tell us about the nature and range of activities that your project will include to engage people with the heritage of the place of worship, such as formal or informal educational visits or talks.
- Give us an indication of what your project outputs will be. Outputs are the physical things your project produces. Alongside capital improvements, examples could be workshops or training sessions, new guidebooks or leaflets, or websites about the place of worship's history.

#### Second round

You will need to send us:

- the final report of any investigations or research;
- the priced copies of the specification, with a bill of quantities and a complete set of tender drawings and tender report from your preferred contractor;
- a breakdown of the works we will fund and any works that we are not funding.

Refer us to your activity statement, which will list all the activities included in your project.

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

#### First round

- Provide a letter of support from the person with overall responsibility for your place of worship (see **Appendix 6: Letter of support** for more information). Tell us about any problems and opportunities there are relating to how your place of worship is managed now. This might include:
  - parts of the building that cannot currently be used because they are unsafe, or damp;
  - opportunities to improve the way that your place of worship is maintained, such as installing handrails or cables, or hatches.
- Refer to your Statement of Need if you have one.
- Tell us about any problems and opportunities there are relating to how people engage with the heritage now. This might include:
  - opportunities to host more events and to attract more people to your place of worship if there are better facilities;
  - a lack of interpretation – people are unaware of the building's heritage.
- Tell us about any other building projects that you are currently carrying out, or plan to carry out in parallel with this GPOW project.

#### Second round

- Send us your management and maintenance plan, which will identify how your place of worship will be looked after in the future.
- Refer us to your activity statement, which will identify the opportunities for engaging people with heritage.

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

When looking at projects in competition with each other, decision makers may ask how urgent a project is.

#### First round

- Tell us if the risk to your heritage is critical and the structural repair work is required within two years. This should also refer to the priorities for repair set out in your condition survey.
- Tell us if there is partnership funding available to you now that won't be in the future.
- Tell us if there are circumstances which mean that this is a particularly good opportunity for you to do your project (for example, you will be able to benefit from or complement another project or development which is going ahead now).
- Refer to your Statement of Need if you have one.

#### Second round

You do not need to answer this question.

### 3d. Why do you need Lottery funding?

#### First round

- Tell us about any other sources of funding that you have considered for this project, including, for example, county church trusts, other charities or statutory agencies.
- Tell us what will happen if you do not get a grant from us.
- Tell us about your own resources, including the level of your unrestricted funds in your reserves.
- Tell us what other, long-term plans you have for your building and what funds you need to commit to them.

#### Second round

You do not need to answer this question.

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

#### First round

- Tell us about the options you have considered, and why this project is a suitable response to the problems and opportunities identified in 3b.
- Tell us about any consultation you have done with the wider community and how this has shaped your project proposals. Remember that we will only fund new capital works if you can demonstrate they will help attract new people to visit and use your place of worship.
- You will need to send us a digital copy of your most recent Quinquennial Inspection, or condition survey with your application.
- Include photographs that illustrate the scale of the problem.
- Include any other specialist survey reports you have.

#### Second round

Send us the final report of any further investigation or research undertaken during your development phase.

## Section four: Project outcomes

Outcomes are changes, impacts, benefits, or any effects that happen as a result of your project. In the notes on the next pages, we have provided descriptions of the outcomes we want your project to achieve.

Your project should contribute towards both of these outcomes. When we assess your application, we will put more weight on the heritage outcome.

We want to see that your project will make a **lasting** difference to heritage, people and communities. It's likely that you will have achieved a number of outcomes before the end of your project, but some may be achieved in the future as well.

### Questions 4a and 4c

Referring to the outcomes described on the next pages, 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.

### First round

Tell us about the outcomes that your project may achieve with our funding.

### Second round

Provide more detail in line with any work you have done during your development phase.

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

### As a result of HLF investment:

**W** Weighted

### The place of worship will be in better condition

**W**

Your place of worship will be structurally stable and weather-tight. Roofs, rainwater goods and drainage will function as intended. Urgent repairs to external walls, towers, spires and associated masonry (such as parapets and pinnacles) will have been completed. Stained and painted glass windows, including leadwork, fixings and ferramenta, will have been conserved. The condition of the interior floors, ceilings, walls, doors and plasterwork will have improved. In addition, the heating and lighting systems might have been upgraded, and measures to help you maintain your place of worship more easily will have been implemented. The improvements might also result from new work, for example installing a kitchen area or toilet facilities to broaden the functionality of the building.

## 4b. Do not answer this question.

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

##### **As a result of HLF investment:**

##### **More people and a wider range of people will have engaged with heritage**

There will be more people engaging with your place of worship and this audience will be more diverse than before your project. You will be able to show there has been an increase in the number of people who use your place of worship outside of the regular hours of worship. For example, you may be able to host more concerts, community events or other educational activities than you did before. You are able to show that interest in your place of worship has increased, either by more people visiting the building in person or by learning about it from a website or a smartphone application. Your project may also provide opportunities for people to learn new skills, either as a volunteer or as an apprentice. You will be able to show that these changes have come about as a direct result of your project, and particularly any community consultation, by collecting and analysing information about the people who engage with the heritage of your place of worship – and those who do not or cannot visit – before, during and after your project.

#### **4d. What are the main groups of people that will benefit from your project?**

##### **First round**

Give us an indication of the main groups of people that will benefit from your project. If new facilities are to be installed, explain who might use them and indicate whether your place of worship will be open to more people than before.

##### **Second round**

Provide specific information about the main groups of people that will benefit from your project. Where necessary, refer us to your activity statement rather than repeat the information twice.

---

#### **4e. Does your project involve heritage that attracts visitors?**

##### **First round**

Fill in as appropriate. By 'visitors', we mean people who do not normally attend your place of worship for regular religious activity.

##### **Second round**

Update with current information.

---

#### **4f. How many people will be trained as part of your project, if applicable?**

##### **First round**

Provide an estimate for the number of project staff, volunteers, interns, apprentices and others you will train during your delivery phase.

##### **Second round**

Update in line with planning work you have done during your development phase.

#### **4g. How many volunteers do you expect will contribute personally to your project?**

##### **First round**

Provide an estimate.

##### **Second round**

Update in line with planning work you have done during your development phase.

---

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

##### **First round**

If applicable, provide an estimate; only include new posts that will be directly involved in delivering the project.

##### **Second round**

Update in line with planning work you have done during your development phase.

## Section five: Project management

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

#### First round

Read about the key tasks you need to complete during **your development phase** in **Part Two: Application process**.

Tell us how you will produce all the supporting documents required with your second-round submission. These are listed in **Section nine: Supporting documents**.

Work might include:

- developing a management and maintenance plan;
- structural investigations, such as opening roof spaces;
- monitoring programmes to work out the scope of urgent repairs;
- specialist reports, for example archaeological surveys, or bat surveys.

#### Second round

You do not need to answer this question.

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

#### First round

- Provide **detailed** information about the team that will work on your development phase, including the person who will take overall responsibility.
- Tell us about the lead professional advisor, and confirm they are accredited in building conservation, have the relevant skills, experience and resources for your project and that they have been appointed in accordance with our procurement requirements. Part of the work of your professional adviser will be

to agree the specification, drawings, schedule of work and the bill of quantities for the repairs with us before you invite tenders for the work.

- Tell us if you will need extra support from consultants or new staff.
- Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place.
- Describe how you will choose the staff, services and goods needed during your development phase.

You will also need to send us:

- briefs for any consultants for your development phase.

#### Second round

You do not need to answer this question.

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

#### First round

Fill in the table with specific tasks during your development phase and tell us who will lead these activities.

- You may find that some of the tasks listed are not relevant to your project, such as the conservation plan and project business plan.
- Include time for us to grant you permission to start (Please read about **permission to start** in **Part three: Receiving a grant**).
- Tell us when you are hoping to submit your second-round submission.

#### Second round

You do not need to answer this question.

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

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.

#### **First round**

Use the table to tell us what the risks are for your development phase.

When you enter your development phase, it is likely that you will have an idea of the work that you will need to carry out in the repair phase.

However, information that you gather during your development phase through the investigative or survey work may mean that you need to do more investigation than you thought, such as monitoring cracks for movement, or establishing the extent of damage to roof timbers. Thinking about these risks now will help you manage them should they arise.

#### **Second round**

You do not need to answer this question.

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

#### **First round**

- Provide information about the team that will work on your delivery phase, including the person who will take overall responsibility.
- Tell us if you will need extra support from consultants.
- Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place.

#### **Second round**

Update in line with any information that you have gained during your development phase.

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

#### **First round**

Identify the main tasks in your delivery phase, including capital work and activities to engage people with heritage.

#### **Second round**

You will need to provide a detailed timetable for your delivery phase with your second-round submission. It should contain all parts of your project, such as choosing contractors, design stages, reviews, activities and evaluation.

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

#### **First round**

Use the table to tell us what the risks are for your delivery phase.

Here we want to see that you have started to think about the possible problems that you may face during your delivery phase. We want you to be realistic about these risks so that you are in a good position to manage them. These risks could be:

- technical – for example, discovering unexpected structural problems;
- financial – for example, a reduced contribution from another funding source;
- organisational – for example, a shortage of people with the skills you need;
- economic – for example, an unexpected rise in the cost of materials;
- management – for example, a significant change in the project team;
- legal – for example, changes in law that make the project impractical; or
- environmental – for example, difficulties in finding sources of timber from well-managed forests; a colony of bats in the roof space that will require you to obtain a bat licence.



The risks you identify will affect the amount you allocate to contingency in **Section seven: Project costs**.

### Second round

Revise these risks in line with the development work you have done.

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

Fill in the boxes.

You will not be able to start the delivery phase of your project until we have received your second-round submission with the supporting documents we ask for, and we have confirmed your in-principle delivery grant and given you permission to start.

## Section six: After the project ends

### 6a. How will you maintain the outcomes of your project after the grant ends and meet any additional running costs?

Successful applications should show how they propose to improve the management and maintenance of their place of worship.

#### First round

- Provide **outline** information about how you will maintain the outcomes of your project, which you identified in **Section four: Project outcomes**.
- Tell us how you will manage and maintain any work you have done.

#### Second round

- Provide **detailed** information about how you will maintain outcomes of your project.
- Tell us if and how your organisation will change during the project, and how this will enable you to sustain the benefits of our investment;
- Refer us to your management and maintenance plan submitted with your second-round submission.

### 6b. Tell us about the main risks facing the project after it has been completed and how they will be managed.

#### First round

You may find it useful to refer to the help notes for question 5g.

#### Second round

- Update in line with any information that you have gained during your development phase.

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

### First round

Please read about **evaluation** in **Part three: Receiving a grant**.

Before we give you permission to start after a second-round decision, we will expect you to have collected baseline information (where you are now) under the Grants for Places of Worship programme outcomes. You may include the costs of collecting baseline data in your development costs. Collecting this data now will help you evaluate the change your project makes during your delivery phase.

### Second round

Tell us your proposed approach, who will have overall responsibility, and how you will share the evaluation and lessons learnt with similar organisations.

## Section seven: Project costs

Here you should provide a summary of your project costs, using a single line per cost heading. As is shown in Section nine, you will also need to provide a separate spreadsheet showing how these summary costs are broken down.

Please note that your grant request will be rounded down to the nearest £100.

Your total project costs must match your project income.

### First round

- We expect your development-phase costs to be detailed.
- Your delivery-phase costs should be based on your best estimates.

### Second round

- We expect you to provide detailed costs for your delivery phase.
- Your delivery-phase costs may have changed as a result of detailed planning and survey work completed during your development phase.

Please read about **buying goods, works and services** in **Part three: Receiving a grant**.

## Columns

### Cost heading

The costs in this column are summary headings that we ask you to follow.

### Description

Please add a general description and include more detail in your separate spreadsheet. There is a word limit of 20 words per description.

### Cost

Please insert the relevant costs – without VAT and contingency (money to be used only for unexpected extra costs).

### VAT (Value Added Tax)

- 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](http://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.
- Please read about VAT and the Listed Places of Worship Scheme in **Part One: Introduction**.

## 7a. Development-phase costs

### First round

#### Professional fees

Fees should be in line with professional guidelines – for example, those of RIBA – and should be based on a clear written specification.

In your separate spreadsheet, you must use a separate line for each consultant.

#### New staff costs

Include costs of any new fixed-term contracts, secondments (people who are temporarily transferred to your organisation) and the costs of freelance staff to help develop the activities set out in your activity statement, or to carry out maintenance tasks. Do not include the costs of paying trainees here. In your separate spreadsheet, you must use a separate line for each new member of staff.

#### All staff posts must be advertised, with the following exceptions:

- If you have a suitably qualified member of staff on your payroll that you are moving into the post created by your HLF project. You will need to provide a job description for this post.
- If you have a suitably qualified member of staff on your payroll whose hours you are extending so that they can work on the project. In this case we will fund the cost of their additional hours spent on the project and you will need to tell us about the role they will undertake.
- If you are a voluntary organisation and are including a proportion of a staff member's time in your Full Cost Recovery calculation.

If you are moving an existing member of staff into a post created by the project, then we can either pay for the cost of this member of staff, or for the cost of backfilling their post.

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

### **Recruitment**

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

### **Other**

Include all other costs you know about at this stage.

### **Full Cost Recovery**

Please read about **Full Cost Recovery** in **Part one: Introduction**.

### **Contingency**

Make sure that you only include contingency here and not in the costs under each heading. Not all cost items will need a contingency.

We will only agree to you using the contingency if you can show an unexpected need within your project.

### **Non-cash contributions**

Include 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.

### **Volunteer time**

Include the time that volunteers will give to helping you develop your second-round submission.

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, administrative work.
- Unskilled labour – £50 a day. For example, working as a steward at a consultation event.

### **Second round**

You do not need to answer this question.

---

## **7b. Development-phase income.**

### **First round**

Please read about **your contribution** in **Part one: Introduction**.

### **Cash**

- We accept cash funding from any public, charitable or private source, including European programmes.
- You can use funding from another Lottery distributor to contribute towards your project as partnership funding. However, this cannot count towards your minimum contribution of 5%, which must be made up of contributions from your own or other sources, not including the National Lottery.
- 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 are ready to apply for permission to start.
- We will assess whether your partnership funding expectations are realistic.
- Include the VAT you will reclaim from the LPW grant scheme.

### **Non-cash contributions and volunteer time**

These should be the same figures that you provided in question 7a.

### **Second round**

You do not need to answer this question.

---

## **7c. Development-phase financial summary.**

The form will generate a summary of your total project development cost, development-grant request and your own contribution.

## **7d. Delivery-phase capital costs.**

### **First and second round**

This includes any capital work to heritage assets, as well as interpretation, and producing digital outputs.

### **Purchase price of items or property**

For all heritage items you buy.

### **Repair and conservation work**

Includes the costs of work to repair, restore or conserve the place of worship, including labour.

### **New building work**

Include the costs of all new building work, including the installation of new facilities, improved heating or lighting systems, or other measures to increase energy efficiency.

### **Other capital work**

Includes the costs of new interpretation, creating digital outputs or making and installing new displays for exhibitions.

### **Equipment and materials**

This includes all equipment and materials relating to repairs, conservation and building work. Do not include materials relating to training here.

### **Other**

Please list any other items that you consider to be capital costs.

### **Professional fees relating to any of the above**

This includes any person appointed for a fixed fee to help with planning and delivering capital work in your project. This may include an architect, building surveyor, structural engineer or a quantity surveyor.

## **7e. Delivery-phase activity costs.**

### **First and second round**

This includes everything you plan to do in your project that you have not covered in capital costs.

### **New staff costs**

For information on new staff posts, please see the help note for question 7a.

### **Training for staff**

This includes the cost of all trainers and resources needed to deliver activities to help staff gain new or increased skills.

### **Paid training placements**

This includes bursaries or payments to trainees, as well as all resources needed to deliver activities to help trainees gain new or increased skills. For example – accreditation costs, trainers' fees, equipment and any specialist clothing.

### **Training for volunteers**

This includes the cost of all resources needed to deliver activities to help volunteers gain new or increased skills.

### **Travel for staff**

This may include the cost of travelling to a site or venue. Travel costs by car should be based on 45p a mile.

### **Travel and expenses for volunteers**

This may include food, travel and any other expenses to ensure volunteers are not out of pocket.

This also includes the purchase and hire of all vehicles, equipment and materials relating to the activities that your volunteers deliver during your project.

### **Equipment and materials**

Examples may include historic costumes, hard hats to give site access, art materials or leaflets and publications. Do not include materials relating to training or volunteers here.

### **Other**

Include any other costs such as food for events, learning activities or premises hire. Please give a clear description.

### **Professional fees relating to any of the above**

This includes any person appointed for a fixed fee to help with planning and delivering the activities of your project. This may include consultants or artists and storytellers.

## **7f. Delivery phase – other costs.**

### **First and second round**

#### **Recruitment**

You must recruit any project manager using a brief and an appropriate selection process.

#### **Publicity and promotion**

We can fund promotional materials that relate directly to your project.

- 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.
- Please read about **acknowledgement** in **Part three: Receiving a grant.**

#### **Evaluation**

All projects must be evaluated and we strongly recommend you allow sufficient budget for this process here. Most projects will be evaluated by staff in your own organisation.

#### **Other**

Include any other costs. In your separate spreadsheet, please include a clear description.

#### **Full Cost Recovery**

Please read about **Full Cost Recovery** in **Part one: Introduction.**

#### **Contingency**

Make sure that you only include contingency here and not in the costs under each heading. Not all cost items will need a contingency.

Your calculation for contingency should reflect:

- the degree of certainty with which you have arrived at your cost estimates;
- the stage of design work proposed;
- the project timetable; and
- the risk in relation to the type of project you are carrying out.

We would normally expect a larger contingency at the first round than at the second round because the project risks should reduce as you develop your project.

We will only agree to you using the contingency if you can show an unexpected need within your project.

#### **Inflation**

You should include an allowance for inflation for any items that may increase in cost over the period of your project.

The calculation must be as realistic as possible and relate to your project timetable.

#### **Increased management and maintenance costs (maximum five years)**

In your separate spreadsheet, add separate lines for:

- New staff costs per year (name and cost of each post) x number of years (maximum five);
- Other increased costs per year x number of years (maximum five).

Increased management and maintenance costs begin when the capital works are complete.

#### **Non-cash contributions**

For information about non-cash contributions, please see the help notes for question 7a.

#### **Volunteer time**

Include the time that volunteers will give to helping you deliver your project. Please refer to the rates listed in question 7a.

## **7g. Delivery-phase income.**

### **First and second round**

Please read about **your contribution** in **Part one: Introduction**, including advice on other possible sources of grant, and the Listed Places of Worship scheme.

#### **Cash**

For information about cash partnership funding, please see the help note for question 7b.

#### **Non-cash contributions, volunteer time and increased management and maintenance costs**

These should be the same figures that you provided in question 7f.

## 7h. Delivery-phase financial summary

### First and second round

The form will generate a summary of your total project delivery cost, delivery-grant request and your contribution.

---

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

### First round

If you need to raise funds during your development phase, tell us how you will do this.

### Second round

You must have your contributions in place when you send us your second-round submission.

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

Please read about **Full Cost Recovery** in **Part one: Introduction**.

## 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.

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

## Section nine: Supporting documents

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

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

### First round

1. Copy of your organisation's constitution, if appropriate.
2. Copy of your organisation's accounts for the last financial year, along with any other accounts you hold specifically to support the place of worship (for example Friends' accounts or fabric fund). These must be either audited accounts or accounts accompanied by an independent examiner's report which include all the money for which your congregation is responsible. Please explain any restriction of the funds set out in the accounts.
3. A selection of good-quality images of the outside of your building, showing each elevation and general views of the inside, and images of the specific repair problems. These should be provided in digital format (either as an attachment or on disk). We will use these images to present your project to decision makers.
4. A location plan of the place of worship.
5. A recent condition survey of the building (for Church of England, Roman Catholic and Methodist congregations this will be the current Quinquennial (five-yearly) Inspection report). If this report is more than three years old, you should provide a supplementary professional report to demonstrate the work is needed within two years. The reports should be in digital format.
6. Copies of any other professional reports or written advice you have about the proposed works.
7. Copy of briefs for any consultants.
8. Spreadsheet detailing the cost breakdown in Section seven: Project costs.
9. Calculation of Full Cost Recovery included in your development costs (if applicable).
10. A letter of support from the person with overall responsibility for your place of worship. See Appendix 6: Letter of Support.
11. Statement of significance, or conservation statement, if available.

### Second round

#### For all projects:

1. An activity statement.
2. The final report of any investigation or research undertaken during the development phase.
3. The priced copies of the specification, along with the bill of quantities (where appropriate) and a complete set of the tender drawings from your preferred tenderer.
4. Breakdown of the work we are funding and the work we are not funding in the tender.
5. Cashflow forecast for the project.
6. A timetable for the works.
7. Proof of the relevant statutory and ecclesiastical permissions.
8. Calculation of Full Cost Recovery included in your delivery costs (if applicable).
9. Spreadsheet detailing the cost breakdown in Section 7: Project costs.
10. Where appropriate, copies of deeds, leases, mortgages, or proof of ownership.
11. A costed management and maintenance plan.
12. Completed evaluation reporting spreadsheet showing the baseline data for your place of worship (see Appendix 1 for the data you will need to collect).



# Appendices

## Appendix 1: Evaluation questionnaire

The quantitative information that we expect you to collect for your evaluation questionnaire is outlined below. For visitors, volunteers, trainees and staff, we also ask for demographic details by gender, ethnicity, social class and disability.

### 1. Activities

We will want you to tell us how many activities were carried out using your HLF grant. The activities we list are:

- **Open days:** Days when you open a heritage site, collection or feature to the public, which cannot normally be visited. It can also include days when you don't charge for admission at attractions that normally charge an entrance fee.
- **Festivals:** Programmes of events or activities for the public, lasting one day or more, with a clearly defined theme or focus.
- **Temporary exhibitions and displays:** Exhibitions or displays that are not a permanent feature of your site and last for less than 12 months.
- **Guided tours or walks:** These may be guided by either your staff or people outside your organisation, but must be based on your heritage site or feature.
- **Visits from schools and colleges:** These can include visits by primary, secondary and higher levels of education.
- **Outreach sessions in schools and colleges:** Visits made by your staff or the volunteers working with you on the project.
- **Other on-site activities:** Activities that take place at your site that you feel are not included under the other headings.
- **Other outreach or off-site activities:** Activities that have taken place away from your site that you feel you have not been able to tell us about.

### 2. Visits

Data about the number of people who visited your attraction the year before your HLF project started and the year after it completed.

### 3. Volunteers

The number of volunteers involved with the funded project and the number of volunteer hours they contributed.

### 4. Training

The number of people trained through the project, under a set of skills headings covering conservation, audience engagement and management. Training includes any structured programme of on-the-job training, skill-sharing, work-based learning and work experience. We ask you to distinguish between training for your staff and training for volunteers.

### 5. New staff

The number of new staff posts created to carry out your project, and the number of these still being maintained after the end of the project.

## Appendix 2: Property ownership

If you are successful with your Grants for Places of Worship application, we expect you to own any property (land, buildings, heritage items or intellectual property) on which you spend the grant.

### Land and buildings

We expect you or your central authority to own the freehold or have a lease of sufficient length for you to fulfil our standard terms of grant. If you do not meet our ownership requirements, we will need you to improve your rights (for example, by changing or extending a lease) or include the owner as a partner in your application.

- For projects involving work to a building or land, if your organisation does not own the freehold, you will need a lease which will run for as long as the terms of grant (10 years from project completion for grants up to £250,000 and 20 years from project completion for grants of more than £250,000).
- If your project involves buying land or buildings, you must buy them freehold or with a lease with at least 99 years left to run.
- We do not accept leases with break clauses (these give one or more of the people or organisations involved the right to end the lease in certain circumstances).
- We do not accept leases with forfeiture on insolvency clauses (these give the landlord the right to end the lease if the tenant becomes insolvent).
- You must be able to sell on, sublet and mortgage your lease but if we award you a grant, you must first have our permission to do any of these.

### Digital outputs

If you create digital outputs we expect you either to own the copyright on all the digital material or to have a formal agreement with the copyright owner to use the material and to meet our requirements – see **Appendix 3: Digital outputs**.

### The information we need about ownership

You will need to provide proof that you own or lease your place of worship. A letter from your central authority will suffice in most cases, but we may ask for further information if the nature of ownership is not clear.

If your organisation is independent and does not have a relationship with a central authority, you will need to provide proof of your ownership or your right to use the property, as referred to in **Section nine: Supporting documents** (Second round, item 10).

## Appendix 3: Digital outputs

We have specific requirements, which are set out in our terms of grant, for **'digital outputs'** produced as part of any HLF project. We are using the term 'digital output' to cover anything you create in your HLF project in a digital format which is designed to give access to heritage and/or to help people engage with and learn about heritage, for example a collection of digital images or sound files, an online heritage resource or exhibition, or a smartphone app.

The requirements do not apply to digital material that has no heritage content or does not engage people with heritage, e.g. a website that contains only information about your organisation/project, visitor information or events listings.

All digital outputs must be:

- **'usable'** for five years from project completion;
- **'available'** for as long as your terms of grant last;
- **free of charge for non-commercial uses** for as long as your terms of grant last; and
- **licensed for use by others** under the Creative Commons licence 'Attribution Non-commercial' (CC BY-NC) for as long as your terms of grant last, unless we have agreed otherwise.

If you are creating digital outputs:

- You **must** provide a management and maintenance plan with your second-round submission.
- You **may** include the value of the increased future costs of management and maintenance for five years as partnership funding.

We expect:

- websites to meet at least W3C Single A accessibility standard;
- you to use open technologies where possible; and
- you to contribute digital outputs to appropriate heritage collections.

## Appendix 4: Reducing negative environmental impacts

Here we have listed which environmental issues we think are likely to be most important on projects, and what we think it should be possible to achieve on each. In question 3a of the application form, provide details on all of the issues you believe to be relevant to your project, and tell us about what your project will **do** to reduce environmental impacts. In question 4c, you will tell us what the **difference will be** in the environmental impact of your heritage/site, as a result of these actions.

### Energy

- Achievement of energy efficiency to at least that required by Building Regulations
- Install appropriate renewable energy technologies
- Install heat recovery from wastewater systems
- Install appropriate electrical circuits to enable the later addition of photovoltaic technology
- Installation of energy-efficient equipment and fittings
- Use of natural insulation materials

### Water

- Install flow-reducing valves to pipe work that is not used for high volumes of water
- Install aerated taps and other water-saving fittings
- Install Sustainable Urban Drainage Systems (SUDS)

### Building materials/construction waste

- Use of traditional products and building materials
- Use of local products
- Use of products with low embodied energy
- Paints, varnishes and other finishes to be natural-oil- or water-based, and not petrochemical- or solvent-based
- Incorporate reused materials from your existing building (refurbishments only)
- 10% of spend on construction materials to be on recycled materials
- Adopt a site waste management plan

### Soil, timber and biodiversity

- No peat to be used
- All timber to come from proven legal and sustainable sources
- Biodiversity impact assessments to be carried out before work starts
- Enhance the overall biodiversity interest of the site

### Visitor transport

- Monitor and set targets for the percentage of visitors and other site users arriving by public transport (for all projects at sites that attract visitors for at least three months of the year)

---

## Appendix 5: Activity statement

---

As part of your second-round submission, we will ask you to describe the activity or activities you will do to ensure that 'more and a wider range of people will have engaged with heritage', in this case your listed place of worship. We will ask you to use the following template to describe the activity or activities you will do, when you will do them, the resources you will need and the difference they will make. We have provided some worked examples, based on the types of activity places of worship typically do to engage people with the heritage of the building, but you should not let these examples confine you. You will have your own priorities depending on how many visitors you have at the moment or based on your location and the size of your local population. You might want to use the opportunity offered by our funding to work with a particular local group who have not engaged with your building before, to revamp tired publications or to share the beauty of your building online with people who are unlikely to be able to make a visit. Be realistic about what you can achieve and make sure you ask us for all the money you need to deliver high-quality activities that are valued by the public. You can find case studies of the activities that others have done online.

**Please ensure the costs you give here are the same as those you give in your second-round submission.**

Example 1							
Activity: Detailed description	Who is the activity for?	What difference will it make for them?	Resources	Costs in project budget (total £ for each item)	Timetable	Targets & measures of success	Method of evaluation
<p>1. New guided tour by volunteers outlining the history and architecture of the building.</p> <p>1a. '10 highlights' tour devised with small designed interpretation board at each stopping point.</p> <p>1b. Accompanying leaflet produced for display in building and local tourist offices.</p> <p>1c. '10 highlights' re-produced on new web pages.</p> <p>1d. Recruitment and training of new volunteers to conduct tour and to work on publicity for the project.</p>	<p>Current visitors</p> <p>People who are first-time visitors</p> <p>Local families</p> <p>People who are new volunteers</p>	<p>More visitors will have a deeper understanding of the building</p> <p>New visitors unable to visit the building will have access to information about its key architectural features</p> <p>A wider range of volunteers will enhance their knowledge of the building's history and develop skills in presenting information</p>	<p>Project Manager: 10 days</p> <p>Consultation and development of tour with local history group: 6 days</p> <p>Training guides: 2 days</p>	<p>Total £6,000, consisting of:</p> <p>£5,500 developing tour including training</p> <p>£300 volunteer expenses including volunteer celebration</p> <p>£200 printed material for tour guides</p>	<p>Research and development months 1-3; training month 4; delivery month 5</p>	<p>6 new volunteers recruited and trained</p> <p>20 new people will take the tour per month</p> <p>Visitors outside the congregation will be aware of the tour and engage with it</p> <p>Positive user feedback</p>	<p>Visitor book and suggestion drop box</p> <p>Observe and document usage by visitors as they go around</p> <p>A sample of visitors asked to complete feedback forms</p>

**Example 2**

<b>Activity: Detailed description</b>	<b>Who is the activity for?</b>	<b>What difference will it make for them?</b>	<b>Resources</b>	<b>Costs in project budget (total £ for each item)</b>	<b>Timetable</b>	<b>Targets &amp; measures of success</b>	<b>Method of evaluation</b>
<p>2. Permanent exhibition about the history of the building and its stained glass plus talks and workshops.</p> <p>2a. New series of talks about the history of the building, its stained glass and the repair project.</p> <p>2b. Open days to view the development of the repair project and provide hands-on stained glass workshops.</p> <p>2c. Permanent exhibition about the history of the building and its stained glass.</p> <p>2d. Recruitment and training of volunteers to photograph and research material for the exhibition.</p>	<p>Current visitors</p> <p>Local families</p> <p>People who are first-time visitors, particularly drawn from the local primary school, the group for disabled young people and the University of the Third Age</p> <p>Local historians</p> <p>People who are new volunteers</p>	<p>More families will have the opportunity to take part in creative workshops</p> <p>Current visitors will be regularly informed in the development of the project</p> <p>A wider range of volunteers will develop skills in photography and display</p> <p>New visitors will learn about the history of the building and its role in the community</p>	<p>Project Manager: 12 days</p> <p>Development of talks series and open days with local historians and volunteers: 5 days</p> <p>Training for volunteers: 4 days</p>	<p>Total £6,500, consisting of:</p> <p>£4,500 project development</p> <p>£1,500 materials for workshops and exhibition</p> <p>£500 training of volunteers and travel expenses</p>	<p>Research and development months 1-3; training month 4; development of exhibition and delivery of open days months 5-6; delivery of talks series month 5</p>	<p>10 new volunteers recruited and trained</p> <p>30 attendees per talk</p> <p>Total of 150 people attending open days and workshops</p> <p>Exhibition attracting 50 visitors per month outside the congregation</p> <p>Positive user feedback</p>	<p>Feedback forms after each talk and open day event</p> <p>Counter of visitors to exhibition and bespoke visitor book</p>

## Appendix 6: Letter of support

Demand for this programme is likely to be higher than the money that is available. Because of this, there is a need to prioritise funds very carefully. In these circumstances, it is extremely helpful to have a fair assessment of the application and also to understand how it fits into the wider strategy of your organisation.

We ask you to send us a letter of support from the person with overall responsibility or a supervisory role for your place of worship. In the Church of England, the Archdeacon should sign. In the Roman Catholic Church, the Financial Secretary of the Diocese should sign. Other denominations or faith groups should ask a suitable representative of the organisation shown in question 1d.

The letter should cover the following areas:

- whether there is a financial need for HLF support.
  - If you have a large congregation in a wealthy area, you will be less likely to attract a grant. We expect everyone applying to cover part of the costs themselves by organising their own fundraising initiatives and by applying for grants from other sources.
- whether there is support for the congregation's continued use of the building.
  - This programme is designed for places of worship in public use and it is important to confirm that there are no plans for the building to stop being used regularly as a place of worship.
- whether there are any plans for pastoral reorganisation in the area which might affect the place of worship.
  - For example, if boundaries are likely to be changed, or congregations merged, this may make it more difficult for a particular building to maintain a congregation. It may be that plans for reorganisation would give this building a more central focus and so be a better prospect for staying in use.
- whether the project meets a clearly identified need or opportunity.



---

## **Appendix 7: English Heritage technical advice service**

---

As part of our assessment of your project, we will look at the urgency of the repair work that has been identified in your Quinquennial Inspection report or other, similar technical report.

To help us understand the repair needs of your place of worship, an English Heritage technical expert may visit your project to look at the scope of the works that are proposed. They will provide us with a report which we will use to determine how urgent the repair need is compared to other schemes in the same batch.

If your application is successful, we will send you a copy of their report when we send you our offer letter. This will specify the investigations, monitoring and research work you will need to undertake to develop your project, as well as outlining the scope of the main repair work.

As part of your project development, we will want to approve the specification, drawings and schedule of work (or bill of quantities) that your professional adviser produces before you invite tenders for the work. These documents should help you manage the costs of your project and follow construction industry best practice.

The tendering contractors will return a priced specification (and possibly a schedule of work or bill of quantities) with their tenders. You will need to send us two copies of the preferred tender priced by the contractor, together with two complete sets of the tender drawings as part of the second round submission.

You should allow time in the development phase to send us this information, so that we can get advice from English Heritage on the suitability of the specification.

# Glossary

**Activities:** We describe anything in your project that isn't capital work as 'activities'. Often these will be activities to engage people with heritage.

**Activity plan:** This document sets out everything you want to do in your project that is not capital work.

**Capital work:** Capital work includes any physical work such as conservation, new building work, creating interpretation or digital outputs.

**Delivery-grant request:** The amount of money you request from us towards your delivery phase.

**Delivery phase:** This is when you carry out your project.

**Development-grant request:** The amount of money you request from us towards your development phase.

**Development phase:** This is when you develop your second-round submission.

**Digital output:** We use the term 'digital output' to cover anything you create in your project in a digital format which is designed to give access to heritage and/or to help people engage with and learn about heritage; for example a collection of digital images or sound files, an online heritage resource or exhibition, or a smartphone app.

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

**First-round application:** Your first-round application is when you provide us with detailed information about your development phase and outline information about your delivery phase. This application will include a delivery-grant request and a development-grant request if necessary.

**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.

**Management and maintenance plan:** This document sets out what maintenance and management you need to do, when you will do it, and who will do it. It also tells us how much it will cost and how you will monitor the work.

**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](#).

**Output:** Outputs are the things that your project will produce, such as a book, a new exhibition, a workshop, or conservation work to a building.

**Partnership funding:** This is how we describe your contribution to your project. It can include cash, non-cash contributions and volunteer time.

**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.

**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'.

**Quinquennial Inspection report:** A report that is written every five years by an architect about the condition of your church, if your place of worship is a Church of England or Roman Catholic church. Some other denominations have a similar report. For faiths or denominations that do not have a regular condition survey, then we will need to see a specialist report about the condition of the building.

**RIBA work stage:** A numerical outline plan from 1 to 7 which organises the process of managing and designing building projects and administering building contracts into a number of work stages, as defined by RIBA (Royal Institute of British Architects). An alphabetical plan was previously used (from A to L).

**Second-round submission:** Your second-round submission is when you provide us with detailed information about your delivery phase. This will include your delivery-grant request.

**Statement of Significance:** This is a document to help people understand what is important in a Church of England building and its fabric and fittings.

**Statement of Need:** This is a document to explain, justify and rationalise a Church of England parish's proposals to all interested parties, that takes account of the Statement of Significance and impact of the proposed change.

**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, include the time of a volunteer who will organise or lead a guided walk, but not the time of the people who go on the walk.

**Weighted outcomes:** These are the outcomes that we value the most, and we will give them extra weight during assessment.