

Heritage Lottery Fund: Grants for Places of Worship

HLF Guidance (England): <https://www.hlf.org.uk/looking-funding/our-grant-programmes/grants-places-worship-england>

Main criteria

- Urgent (within two years) structural repairs to listed places of worship
- Project costs can be used to encourage greater community engagement
- The project MUST achieve the outcome of improving the condition of heritage
- The project MUST achieve the outcome of allowing a wider range of people and communities to engage with heritage
- You must be able to demonstrate major financial need
- Funding for projects between £10,000 and £250,000. For exceptional large projects that cannot be phased, projects can be taken to the national committee

Application process

- Apply online via the HLF website (insert hyperlink)
- They recommend you send a project enquiry form before applying (https://forms.hlf.org.uk/officeforms/hlf_projects.ofml)
- A two round process with a development phase of a year followed by works phase
- Stage 1 - can take up to 12 months and will include investigations and fundraising
- Stage 2 - will take up to three years for repairs
- Assessment of applications takes three months at each round
- Decisions are made on Round 1 bids four times a year by local Committees. Deadlines are usually:
 - **Feb for June Committee meetings**
 - **May for September Committee meetings**
 - **August for December Committee meetings**
 - **November for March Committee meetings**

Exact deadlines are available via the HLF website or by contacting the relevant local team.

Eligibility

- Listed Place of worship - used at least 6 times a year
- Use other than by the congregation
- Must be able to accept lottery funding
- Work should not have already started
- Must not take more than three years to complete

Supporting documents

- Accounts - last financial year and independently examined following the Charity Accounting Regulations
- Quinquennial Inspection/condition report with evidence of urgency for works
- Photographs of the church in general and details of the problem areas
- Letter of support from the Archdeacon or equivalent
- Documentation can be posted within 5 days of submission, before deadline

Useful guidance

- Highly competitive scheme, with an 52% success rate in 2015/16
- You are expected to contribute to the project i.e. through your own funds, through partnership funding, volunteer time and through a local fundraising strategy
- The value of maintenance from your own resources for up to five years after the project finishes can be included as partnership funding
- LPWGS (<http://www.lpwsgscheme.org.uk/>) should be included as partnership funding; **you should be sure to check the eligibility of items put forward for reclaim before including them**
- A quote from a builder is not enough to prove urgency of the works, you will need an up to date Quinquennial Inspection or professional condition report.
- The development stage will help to inform your costs, these can be estimated to the best of your knowledge at the application stage
- The grant scheme is designed to encourage a wider range of people to take an interest in places of worship beyond the primary function of worship

Activities and materials to engage a wider range of people such as phone apps, leaflets, guidebooks, websites, concerts and tours should be included in the project.

New capital works up to 15% of total project costs for items such as toilets, kitchens, improvements to heating and electrical systems, other works to improve energy efficiency, works to assist with the on-going maintenance of the place of worship are now eligible but **not mandatory**.

Works must respect the historic character and significance of the building

How they assess applications

- Decisions are made based on quality and value for money
- What is the heritage value 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?

Download this document at:
www.nationalchurchestrust.org/hlf-grants-england



Application summary

Name of your organisation

Project title

Project summary

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

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

Yes / No

If yes: Please tell us who you received advice from

Is this your first application to the Heritage Lottery Fund?

Yes / No

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

This section provides information and examples of how you might complete the GPOW application form. It is not a template, and you should complete your application based on your local needs and capacity.

Parochial church council of **St Peter and St Paul**

i.e. Nave roof repairs at St Margarets

A short summary of your project;
Urgent repair works to...
And ancillary works to engage the wider community in...
etc

Make initial contact with the HLF via their Project Enquiry Form to check the eligibility of your project and receive additional guidance from HLF staff.

Example Project Summary:

The Nave roof slating of St Margaret's is suffering from an advanced case of nail fatigue, which is now causing water ingress and needs addressing urgently within the next two years. In addition to this there are major issues with the cast iron rainwater goods and related problems of water ingress within the tower. The two issues are directly related, and repairs cannot be economically phased. We would also like to take this opportunity to encourage more visitors to the church through our links with the internationally renowned poet laureate Alfred Lord Tennyson, whose father was the rector here in the early 19th century. We would seek to strengthen links with the Tennyson Research Centre and Tennyson Society and would improve virtual accessibility for visitors through a new website and updated interpretation. Physical access would be increased through repairing the historic door and keeping the church unlocked. Capacity will be built through training and mentoring support for churchwardens and clergy, with support delivered by SPAB, the NCT and the diocese.

Section one: Your organisation

1a. Address of your organisation.

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

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

Yes / No

If no: Enter the address of your project

Address
Town/City
County
Post code

Local authority within which the project will take place

Constituency within which the project will take place

1c. Details of main contact person.

Name
Position

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

Yes / No

If no: Enter the address of the main contact person

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

The organisation is the PCC in this case, therefore the address will be the address of the church

Who will be your main point of contact for the duration of the contract?
The priest, churchwarden etc.

Note: HLF prefer projects that are locally owned and managed, with the support of professionals, rather than led by the architect or external professionals. Avoid having your architect as the primary contact, but ensure that your local project leader (e.g. churchwarden or clergy) is confident of his/her knowledge about the project and is able to respond effectively to queries from your assessing officer.

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

1e. The legal status of your organisation.

Please select one of the following

Local authority

Other public-sector organisation

Organisation not in the public sector

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

Faith-based or church organisation

Community or voluntary group

Other

If other please specify

For all organisations not in the public sector:

Describe the size and staff structure of your organisation

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

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

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

For all organisations:

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

Company - give registration number

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

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

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

Yes / No

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

1g. Are you VAT-registered?

Yes / No

If yes: Please provide your VAT number

Main purpose and activities;

- Give the name of diocese and deanery, if appropriate
- The number of people attending on the main day of worship
- The number of people on the electoral roll
- Mission
- How often is your church left open for visitors (i.e. unlocked)?
- List the community groups that use the building regularly and the activities the building is used for

The PCC/church/chapel/meeting house;

- A voluntary organisation with legal responsibility for the care of the building comprising a Secretary, Treasurer, 2 churchwardens/volunteers and other general church members
- Any paid staff members i.e. fundraisers, parish priest etc
- Accounts – give information based on your latest accounts, detail your unrestricted general reserves

PCCs with a turnover of under £100,000 are 'excepted' charities and will not have a charity number

Example: 1d

The organisation is the PCC of St Margaret's Church is within the Lincoln Diocese and the Bollingbroke Deanery. Services are held regularly throughout the year; approximately 14 are scheduled to be held in 2013. Attendants at these services is between 6-20. The electoral role for the PCC comprises of 15 residents. There are currently no community groups in the village but the church welcomes meetings regularly regarding local affairs.

Section two: The heritage

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

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

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

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

Yes / No

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

If yes: Do you, or a partner organisation, own the building, land or heritage items outright?

Yes / No

If no: Do you, or a partner organisation have a leasehold on the building, land or items?

Yes / No

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

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

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

If yes: Do you or a partner organisation have a mortgage or other loans secured on the property or item, or any plans to take one out?

If yes: For landscape projects, please provide an Ordnance Survey grid reference for your landscape

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

Yes / No

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

Describe:

- Development of the building over time
- Its form now i.e. materials, architectural features, shape etc.
- Why is the church significant? Who is it important to? i.e. specific community groups
- Special features and historical associations
- Architectural, artistic and historical importance

Documentation: refer to list description and location plan, also Statement of Significance if you have one (usually produced for a Faculty application)

Is your church on the Historic England, Heritage at Risk Register?

<https://www.historicengland.org.uk/advice/heritage-at-risk/search-register>

Describe other factors that put the building at risk i.e. dwindling congregations, metal thefts, isolated location

Documentation: refer to Quinquennial Inspection/Condition Survey, photos of issues etc.

Example: 2b

St Margaret's is situated in an isolated position within a small Lincolnshire hamlet. It is on the Historic England Heritage At Risk Register, assessed as in Poor condition, with a priority category D (slow decay). The Nave slate roof is suffering from serious nail fatigue; the fixtures are now failing, causing slippage of the slates in significant numbers. The roof is now covered by tarpaulins. Over £62,000 worth of repair work has been identified within the 2012 Quinquennial Inspection (excluding VAT and professional fees), much of which is urgently required immediately, or within the next two years.

The church is also built largely of Spilsby Sandstone (or Greenstone) which is a poor building material that can weather badly; especially when used in conjunction with inappropriate cement-rich mortar, as is the case here.

No need to answer these

Section three: Your project

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

3a. Describe what your project will do.

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

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

3d. Why do you need Lottery funding?

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

What other options you have considered, why will this project/money address the problems you raised in 3b?

Describe any consultation with the community and how you took this on board, have you identified any gaps that the church can fill within the local community?

Documentation; refer to Q1/condition report, include photos showing problems

Example: 3c

Unfortunately at the moment the precarious state of the nave roof is rendering the church unsafe. We have secured a temporary tarpaulin over the worst part. The door makes access almost impossible for the elderly as it is so stiff. One 80 year old lady got stuck in 2012 in the church and was unable to pull open the door. Currently, activities within the church are having to be cancelled due to the condition of the church, for example our annual flower festival will not be able to proceed until the church has been repaired. This event has been one of our principal fund raiser. The enclosed Q1 report has proven the critical nature of the repairs needed, urgent within 2 years. Heritage England's risk assessment of the church being in poor condition is also evidence of the need. Carrying out these repair works are critical now, but the recent launch of our website has raised interest in the church that we would like to build on now by producing a more professional website and maintaining this momentum. The church is cared for by 6 volunteers, with an average age of 65. We need to train new as well as existing volunteers in maintenance and management skills to help sustain the church in the future.

Describe investigations and fundraising you will carry out during the development phase.

Describe the works you will carry out in stage two:

- The urgent structural repairs
- Any new works such as installing a kitchen area or toilets; upgrading heating or electrical systems, or other works to improve energy efficiency or make you building easier to maintain. We recommend that you already have a well considered proposal for improvements you wish to carry out, as refinements to meet the conditions of statutory consultees will delay the development phase of works (can be up to 15% of project cost)
- Community engagement, explain how your project will engage people with the heritage of your church, such as formal or informal educational visits or talks. Remember to be creative when thinking about how to attract new visitors and make your project stand-out during assessment
- Explain how the project will engage new volunteers or improve skills of existing volunteers or churchwardens to help sustain the church and deliver the project

Describe projects outputs, these are the tangible things your project will produce i.e. repairs, better heating, church open more often, workshops, new guidebooks, websites and brown signs, training workshops, mentoring, developing a new friends group.

Describe problems and opportunities relating to the **building**/how your church is managed now;

- Parts of the building that cannot currently be used because they are unsafe/damp
- Dangerous structures at imminent loss of fabric

Describe opportunities to improve maintenance i.e. installing handrails or hatches Tell us about any problems and opportunities there are relating to how **people** engage with the heritage now i.e. too cold for community events, not enough trained volunteers to run events. Describe opportunities to host more events and to attract more people to your church if there are better facilities

Documentation; refer to letter of support from Archdeacon/equivalent

Competitive programme; **EVIDENCE OF URGENCY IS KEY**

Is the risk to heritage critical, is the structural repair work required in two years? Is partnership funding available to you now that won't be in the future? Are 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)?

Documentation; refer to Quinquennial Inspection/condition survey

What other sources of funding have you considered but for which you have been unsuccessful or ineligible? What will happen if you do not get a grant from the HLF? How much do you have in your own reserves that can be used? What other long-term plans do you have for your building and what funds do you need to commit to them? i.e. Parish Share or heating, redecoration.

Example: 3a:

Our project aims to address urgent repair needs of the church and to raise wider awareness of its international significance as Tennyson's birthplace, through a two stage grant process. We will begin to develop our project by first procuring a conservation-accredited architect through a competitive tender process. The architect will then help us to produce a maintenance plan and access audit to help us be more sustainable into the future. We will also carry out investigations into the condition of the roof slates and timbers, commission a drainage survey and looking into whether the church has bats. These investigations will be used to inform the specification and schedule of works, to be produced by the architect. We will also use this phase to carry out local fundraising through coffee mornings, open gardens and afternoon teas, themed walks, Tennyson Research centre talks and poetry readings, clay pigeon shooting, Regency Tours and teas etc and to approach wider trusts and funders such as East Lindsey DC, Garfield Weston Foundation, Lincolnshire Churches Trust, National Churches Trust, etc. Research into the most appropriate heating scheme will also be done at this stage, most likely to be quartz-ray heaters (white lights), and consideration of a lighting scheme will also be carried out. Enhanced lighting and heating will improve the visitor experience and will make the building more relevant for future generations. Further development will include the production of an activity plan that will set out our plans for the future to help widen community and tourist engagement - for example the development of our website, which is currently work in progress. The website has been initiated to draw more awareness to the importance of Tennyson within our county and worldwide. The Lincolnshire Wolds is recognised as an area of Outstanding Natural Beauty with followers from all over the world coming to visit the birthplace of Tennyson. We wish to preserve and build on this as best we can. This re-representation of Tennyson will give visitors the best possible information and experience. During the Development phase the PCC will work with our local webmaster as well as with local interested parties to achieve the above. A skills audit of volunteers related to project and buildings management, maintenance and interpretation will inform the Activity Statement and training needs. We will work with consultants to develop training and systems related to church tourism, maintenance systems and interpretation during the delivery phase, with specific procurement, project management and fundraising training delivered in the development phase to help build the capacity of the church to successfully deliver the project. The second phase would involve the repair works, to make sure the building remains wind and weather tight, to allow it to be used well into the future. The urgent works needed within the next two years are to re-slate the nave roof and repair east gable copings, re-point ridges and flashings to porch and chancel, mortar repairs to porch copings, replace flaunching's at abutment with tower, re-bed parapet copings and pinnacles, overhaul cast iron rainwater goods, remove concrete drainage apron and various masonry repairs including re-pointing. Other capital works would also be undertaken at this stage, such as the restoration of the south porch door (currently sagging and binding, making access difficult), the re-display of existing interpretation boards and the manufacture of new boards, all relating to the Tennyson and his links to the church and village. The new heating and lighting scheme would also be carried out in conjunction with the repair works. The website and activities to widen the appeal of the church would also be completed and put into place by the end of the repair works.

Example: 3b

Currently the church roofs are causing major problems. At the end of 2012, the ongoing slate slippage significantly worsened with two large holes appearing on the north elevation, a temporary tarpaulin covering has been installed to prevent water ingress. There are also issues relating to the use of hard cementitious mortars in conjunction with the very soft Greenstone, which is causing increased erosion of the masonry, and should be addressed before stone replacement becomes necessary. The church also has a concrete drainage apron around the church which is preventing water escaping and causing damp to the base of the walls. This repair project will address these urgent issues and will allow the building to be restored to a satisfactory condition for future use. The re-slated roof will last for over 100 years, and removal of hard mortars and repairs to the drainage and rainwater goods will help prevent further deterioration to the masonry and internal fixtures. This significant grade II building will once again be watertight. Currently, increased use of the church building is hampered by many of the deficiencies identified in the Quinquennial Inspection report as well as current inadequate heating lighting and access. Including disabled and associated health and safety issues. The project which we are making grant application for will allow us for improvements and provide more opportunities for the community to be involved in many different ways.*

We are keen to encourage the use of the building for choral societies and musical ensembles, as well as events associated with various Tennyson recitals. On our website we are showing a local primary school's 'film club' which feature children depicting 'the early years of Tennyson'. We need to encourage dissemination of Tennyson's history in and around our area. Our Fund Raising coordinator is keen to be able to approach local schools to gather awareness and provide the opportunities for them to come on 'Themed days' to the church and the House to recite poetry and learn more. We are pleased to be able to support this with a letter from our Archdeacon.

Outside the local community, we have only approx. 200 visitors per year, partly due to the isolated location of the village, and partly due to the lack of marketing that we are able to do. This project will allow us to raise the profile of the church to a much wider audience, through a high quality professional website, with photographs, 360 panoramas, archival resources from the Tennyson Research Centre, audio recordings from the Tennyson Society and tourism information such as local attractions and B&Bs etc. We are confident that we can at least double our visitor numbers a year after the repairs have been completed.



Section four: Project outcomes

In this section, tell us about the difference that your project will make for heritage, people and communities.

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

4b. Do not answer this question. This is a generic form used across several HLF programmes, meaning not all questions are relevant to Grants for Places of Worship.

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

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

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

Yes / No

If yes: What are your existing visitor numbers?

If yes: How many visitors a year do you expect on completion of your project?

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

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

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

What will your project achieve?

Start with **baselines** i.e. visitor numbers now and explain how this will be improved by the end of the project i.e. double your visitor numbers

Heritage

Your church will be in a better condition, for example;

- It will become structurally stable and water-tight
- Roofs, rainwater goods and drainage will function as intended
- Heating and lighting systems will have been upgraded
- Measures to help maintain the church will have been implemented
- New works will have broadened the functionality of the building
- Maintenance skills will be developed to allow implementation of the maintenance plan

Communities

More people and a wider range of people will have engaged with heritage, for example;

- Your audiences will be more diverse than before
- You will have evidence that visitor numbers have increased outside of worship i.e. through more concerts, mums and tots mornings, school visits
- Interest in your church has increased i.e. through a guidebook or website, campaigns will be launched on regional tourism sites (e.g. spring flowers, heritage open days, key anniversary dates)
- Volunteers have learned new heritage skills i.e. maintenance and monitoring, tour guiding, research, interpretation)

Who will be using your new facilities? Will you have more tourists visiting due to your new website? Will more groups be able to use the church now it is water tight?

Do not just say the congregation – need to engage wider groups of people (e.g. local schools, local, regional and international tourists, church crawlers, specific **new** groups such as scouts, cadets, children in care, mothers and toddlers, environmental/biodiversity groups

Estimate these or have a look at your visitor book, you will need to demonstrate you can increase these through the project

Will any volunteers (even PCC members) learn about project management? Will they be able to observe the building works and learn about heritage techniques? Can an open day be organised to show the local community how conservation works are carried out?

Estimate how much time the PCC/church and wider community volunteers will spend on the project. Explain limitations in this i.e. employed or retired PCC members, lack of resources, elderly volunteers etc

Include any new staff employed for project management or to deliver the activity programme (not including the architect). For example, a Heritage Officer working 2 days/week would be 0.4 fte.

Example: 4a

The outcome for heritage following this repair project will be substantial as St Margaret's will go from a deteriorating building in a poor condition to one that is structurally stable and water tight. The roof, rainwater goods and drainage will all have been renewed and improved, which will allow for better maintenance in the future and will slow down the rate of deterioration. Additionally the heating system will have been upgraded and improved, this will allow the temperature of the church to be raised to a constant low level that will help keep the relative humidity of the building low; protecting the internal fixtures and fittings, and maintaining the building structure. Finally, works to restore the door to a usable condition, in conjunction with all of the above, will allow the building to be used effectively in its role as a place of worship whilst also encouraging its heritage use with respect to tourists, Tennyson and the wider community.

A new management and maintenance plan will be developed in partnership with SPAB's Maintenance Cooperative team, with skills training for volunteers to monitor and undertake preventative maintenance tasks. We will also contract for gutter clearance twice a year to maintain the rainwater goods and identify and issues at high level early on, using the fabric fund to address minor repairs before they develop into larger repair requirements.

Example: 4c

More people and a wider range of people will have engaged with heritage through this project. We will work with the NCT to develop a tourism strategy and resources, with materials developed appearing on the regional tourism website, on A Church Near You, and the diocesan website. We will also aim to include marketing on themed events on VisitEngland.

The development of our website will bring a new international following for Tennyson Heritage in our village and the Lincolnshire Wolds. The smartphone-friendly website will allow visitors to plan their visit and interact when on site through a virtual tour and information of the churches history, along with learning more about Tennyson. Schools will be able to get more involved and visit on a regular basis through new lesson plans focused on KS 1 and 2 local history and other subjects. Volunteers will be trained to support school visits, and we will deliver a CPD training day for six local primary schools on how to use St Margaret's as a learning resource. Encouraging schools to enrich their curriculum through visiting the church and area and using the download available from the website. We will also organise an open day during the repair works to allow local people to come and view the works and learn about traditional roofing skills.

Example: 4d

We envisage that a wider group of people will be coming to see us than we currently cater for. Evidence from our visitor book shows that we currently get visitors from as far afield as Australia and Japan, many returning visitors too, but we expect, with our new website, to involve more of the UK tourists who didn't realize what was on offer here. In this respect the focus of our new representation will be the Tennyson Heritage and Lincolnshire Wolds. Tour Operators in the local seaside resorts are to be approached to drum-up the bus tours which stopped in the 90's. We hope that people are coming here to learn and appreciate what is being offered to them.

At a local (and possibly wider) level, the improved facilities the building will offer will encourage groups to make use of it for meetings, functions, concerts and recitals.

Section five: Project management

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

Development phase

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

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

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

Task	Start month	Start year	End month	End year	Who will lead this task
Activity Plan - to help us plan the activities we will offer the public as part of our project	June	2013	October	2013	PCC
Maintenance Plan - setting out the annual tasks the PCC will carry out to keep the building in good condition such as clearing gutters	June	2013	July	2013	Architect
Access audit to consider the accessibility of the church for users and visitors	June	2013	July	2013	Architect
Drainage survey	August	2013	August	2013	Architect
Roof timbers report	August	2013	August	2013	Architect
Slate roofing report	August	2013	August	2013	Architect
Bat survey	July	2013	July	2013	Architect (Bat volunteer will undertake this)
Approach partner organisations for contributions (Tennyson Research Centre and Tennyson Society)	July	2013	July	2013	PCC and Church Buildings Department, Diocese of Lincoln
Research material for new interpretation boards	August	2013	January	2014	PCC and Church Buildings Department, Diocese of Lincoln
Approach match funders i.e. ELDC/National Churches Trust etc	June	2013	June	2014	PCC and Church Buildings Department, Diocese of Lincoln
Local fundraising	June	2013	June	2014	PCC

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

Risk	Likelihood	Impact	Mitigation	Who will lead this
unidentified timber decay	High	High	Investigation into condition as soon as possible	architect
bats	Medium	Low	timetable	architect
difficulty obtaining further match funding	Low	High	Approach as many as possible during development phase	PCC

Stage 1 tasks examples;

- Write your **activity statement**, see **programme guidance, appendix five**
- Write maintenance plan. Work with your architect or SPAB to produce a plan that is realistic and is based on your capacity to deliver
- Write Access Audit (your architect will produce this)
- Investigations into the building structure – drainage, timber, roof, bat or structural surveys etc.
- Structural monitoring
- Opening the church door more often – public access. Details of opening times should be posted on your website, ideally with volunteers available to answer questions and provide a welcome
- Develop a programme of activities to engage the community more
- Develop a tourism strategy with support of the NCT or your local diocese
- Obtain statutory consents i.e. Faculty, Planning Permission
- Develop a schedule of works and specification (your architect will produce this)
- Consider future running costs and maintenance – how will you sustain the project?
- Consider how you will evaluate the project – establish baselines i.e. current visitor numbers
- Develop a new Friends group
- Develop a training programme for existing volunteers in maintenance, engagement and interpretation skills

The team delivering the grant;

- This is usually the PCC, lead by the main point of contact for the grant
- Describe the structure of this team
- Will you take advice from any experts or specialists (e.g. SPAB, local wildlife trust, schools, CCT, NCT)?
- Who is responsible for making decisions? Who will be involved in meetings etc?

Who will be your lead professional adviser? This should be a conservation accredited architect, building surveyor or structural engineer and will need to be appointed in accordance with HLF procurement guidelines, so will not necessarily be your current church architect. They will generally be appointed on a cost/quality basis. They will produce the specification, drawings, schedule of work and the bill of quantities for the repairs before you invite tenders for the work.

Include everything above for 5a. and try to estimate dates, you will have up to a year to complete the development phase.

You will not need to produce a Conservation plan, Management plan or Project business plan.

Risks

You need to identify any threats to the project and how you will try to avoid these;

- Lead theft during project – mitigated through roof alarms
- Dry rot found during timber investigations – contingency within grant costs
- Rare bat species – obtain bat licence
- Etc

Delivery phase

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

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

Task	Start month	Start year	End month	End year	Who will lead this task
reslate the nave roof and repair east gable copings	June	2014	December	2014	architect
re-point and flashings to porch and chancel	June	2014	December	2014	architect
mortar repairs to porch copings	June	2014	December	2014	architect
replace flaunchings at abutment with tower	June	2014	December	2014	architect
re-bed parapet copings and pinnacles	June	2014	December	2014	architect
overhaul cast iron rainwater goods	June	2014	December	2014	architect
remove concrete drainage apron	June	2014	December	2014	architect
Various masonry repairs including re-pointing and removal of cement mortar	June	2014	December	2014	architect
Re-display interpretation boards (i.e remove panelling)	June	2014	July	2014	PCC and Church Buildings Department, Diocese of Lincoln
Restore south porch door (currently sagging and binding)	June	2014	December	2014	architect
install quartz ray heaters	June	2014	December	2014	architect
install new lighting scheme	June	2014	November	2014	architect
commission professional company to produce new website based on Tennyson's Birthplace	June	2014	August	2014	Web designer
produce and manufacture new interpretation boards	June	2014	November	2014	Contractor

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

Risk	Likelihood	Impact	Mitigation	Who will lead this
more unidentified timber decay	Low	High	Contingency within costs for any unexpected decay found	architect
Unidentified structural problems	Low	High	This will need to be discussed by all parties to find solution	Architect
Less slates are re-useable than previously thought	Medium	Medium	Contingency to cover possibility	architect

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

Project start date: mm/yy

Project finish date: mm/yy

Stage 2

This team will largely consist of the those managing the development phase of the project. You will also have contractors and specialists working at the church now, they will need to be included in decision making and meetings etc

Timetable; this should include main tasks and capital works for your project. It should also include activities being carried out to engage people with heritage i.e.

- Construct scaffolding around church
- Strip and relay roof with new lead
- Renew rainwater goods
- Re-point tower at high level
- Masonry repairs to parapets
- Installation of new heating system within nave
- Research, design and publishing of new guidebook
- Details of each concert/event etc. being organised

Risks;

- 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, don't get faculty approval or listed building consents
- 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.

Use this tailored information to inform the amount of money you put into your contingency

Your repairs are likely to begin in the spring after your development phase has been completed and the stage 2 grant has been awarded.

The project may take up to three years to complete.

Example

Example

Section six: After the project ends

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

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

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

Risk	Likelihood	Impact	Mitigation	Risk Owner
	High / Medium / Low	High / Medium / Low		

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

Looking to the future;

Think about what you wrote for 4a and 4c – how will you make sure these remain in place?

- How will you keep the rainwater goods in good condition? Will you clean them out regularly? Your maintenance plan will form part of your long-term plan to improve sustainability
- How will you maintain your programme of concerts? Will they pay for themselves?

Risks;

- Further repair needs
- Theft or vandalism from grant aided works
- Environmental conditions
- Dwindling congregations or risk of closure
- Threats to community engagement i.e. continuing to pay for website hosting

Evaluation;

The baselines established within 4a and 4c should be compared to new figures once the project is complete. Describe how you will do this – this could include visitor numbers, increased donations, reduced damp or replaced stonework.

Describe how you will share the learning – this could include a display of photographs of the project, a website or newsletter with regular updates on the project etc.

Example: 6a

The benefits of the projects should lead to a significant increase in the number of visitors. The church will not be locked and therefore is open 365 days a year which will lead to more income for the church. The additional running costs will be electricity and the plan will be to hold a significant number of local community events in the church which will also raise funds to meet these costs. The building will be kept in good condition to increase the lifespan of the repair works, this will be done by following the annual maintenance plan and setting aside a sum of money each year to cover these needs. This includes the award of a contract for regular gutter clearance and high level monitoring, which will feed into the next Q1 report. Volunteers will also monitor the church and undertake minor repair work after training from SPAB.

Section seven: Project costs

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

7a. Development-phase costs.

Development costs

Cost heading	Description	Cost	VAT	Total
Professional Fees	Architect fees RIBA 2-4 (£9000), additional surveys (£4000)	13000	2600	15600
New staff costs				
Recruitment				
Other costs (development-phase)	bat survey £500, Maintenance Plan (£1500), Activity Statement (£1500), Tourism consultancy (£500); Venues and refreshments for consultation events: 4 events refreshments - £50 per event (£200); publicity materials £200; Fundraising training and consultancy (3 days x £500/day); Procurement and Capital Project Management Training and mentoring(mentoring 3x£400/day, training £500)	7600	1520	9120
Full Cost Recovery				
Contingency	10% of costs	1700	340	2040
Non-cash contributions				
Volunteer time	Project team support (12 meetings with 4 professionals at £350 a day each over project duration)	16800		16800
Total		39100	4460	43560

Project Costs; Stage 1

- Some of these cost headers will not apply to you for this project – new staff costs, full cost recovery etc.
- For the others try to estimate as best you can.
- **VAT can be recovered via the Listed Places of Worship Grant Scheme, be sure to check eligibility; see http://www.lpwscheme.org.uk/lpw_guidance_notes_download.pdf**
- Refer back to your answers for 5a and 5c to help you fill this section in
- As a guide, professional fees can be anywhere between 5% and 15% - consider 12% to be the norm
- Bat surveys in some areas are generally free, access audits are c.£350, a support to develop a good maintenance plan can be £500 - £1500 and investigations can be from £500 upwards
- An activity statement could be £1000 - £3000, depending on the ambition of the engagement plan. Consider if you need specialist advice on church tourism or website development costs
- You can include some training and/or mentoring for clergy and volunteers on skills needed to deliver the project, such as tendering, fundraising, governance
- Include a contingency of between 5-10%, depending on the risks that further condition reports will be required for as yet undiscovered problems
- Non-cash contributions include use of meeting space or free loan of equipment etc.
- Volunteer time can be included and is categorised into professional, skilled and unskilled (see HLF guidance for more on this)

Full Cost Recovery (HLF explanation)

- For voluntary organisations, we can also accept part of an organisation's overheads (sometimes called 'core costs') as a part of the project costs. 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. 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) and Big Lottery Fund (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.

7b. Development-phase income.

Development income

Source of funding	Description	Secured?	Value
Local Authority			
Other public sector			
Central government	LPWGS VAT rebate	No	2600
European Union			
Private donation - Individual			
Private donation - Trusts/Charities/Foundations			
Private donation - corporate			
Commercial/business			
Own reserves	Reserves form fabric fund and fundraising	Yes	1060
Other fundraising			
Non-cash contributions			
Volunteer time	Project team support (12 meetings with 4 professionals at £350 a day each over project duration)	No	16800
HLF grant request			23100
Total			43560

Project income; partnership funding

- You will need to find at least 5% of the funding for this project from your own or other match funding. This will mostly come from VAT rebates, private donations or businesses, your own reserves and community fundraising
- You should have the funding for the development phase in place, or be able to underwrite it to allow HLF to give you permission to start. LPWGS rebates do not have to be secured at the point of application.
- Give the same figures here for non-cash contributions and volunteer time as you did for 7a

Example

7c. Development-phase financial summary.

Total development costs	43560
Total development income	20460
HLF development grant request	23100
HLF development grant %	53



Grants for Places of Worship

Grants from £10,000 to £250,000

Application form

Example

Cost Heading	Description	Cost	VAT	Total
Purchase price of items or property				
Repair and conservation work	Re-slate the nave roof and repair gable copings. Re-point ridges and flashings to porch and chancel. Mortar repairs; replace flaunchings at abutment with tower/ Re-deb parapet copings and pinnacles. Overhaul cast iron rainwater goods. Remove concrete drainage apron. Various masonry repairs.	100000	20000	120000
New building work	Re-display interpretation boards and removal of inappropriate panelling to tower.. Install new heaters and lighting	10000	2000	12000
Other capital work	New interpretation: Tennyson related display boards, new website	5000	1000	6000
Equipment and materials (capital)				
Other costs (capital)				
Professional fees relating to any of the above (capital)	CDM Co-ordinator; engineer; wild life consultant; architect	10600	2100	12700
Total		125600	25100	150700

Capital costs

- Repair and conservation work – this will be the bulk of your costs and will include labour, contractors fees and scaffolding costs.
- New building work; add in here new building works such as electrics or heating, new toilets or kitchen facilities, access improvements such as ramps, maintenance access improvement ladders/hatches
- Other capital work; this might include the cost of new interpretation or exhibitions, new website
- Professional fees; for your architect or surveyor to oversee the project, CDM co-ordinator, M&E engineers, Quantity Surveyor, or specialist consultants (e.g. bats)

Example

Cost Heading	Description	Cost	VAT	Total
New staff costs	P/T Activities project manager 1 year x .4 fte x £25000 (pro rata) + NI and pension	11261		11261
Training for staff				
Paid training placements				
Training for volunteers	Training for maintenance volunteers (SPAB 2days x £750/day); training on interpretation and tourism marketing (NCT 2 daysx£250/d), tour guide training (£350)	2350	470	2820
Travel for staff				
Travel and expenses for volunteers	Travel for skills workshop, interpretation days and refreshment	1500		1500
Equipment and materials (activity)	Maintenance equipment box (£250), PPE for maintenance volunteers (£250)	500		500
Other costs (activity)	Interpretation boards and consumable materials, refreshments for workshops and other engagement events, design and printing of new leaflets and children's packs (£1000)	2000	400	2400
Professional fees relating to any of the above (activity)	Teacher to design KS lesson plans (2x£350/day) + CPD day for teachers (£500),	1200		1200
Total		18811	870	19681

Activity costs

These relate to any activities you are delivering as part of the project. For example:

- Training in heritage skills you plan to do as part of the project
- The use of researchers to produce a new guidebook on the church to help raise its profile and increase visitor numbers
- Professional fees to develop school lesson plans, materials for mother and toddler groups
- Specialist training for young people on creating a film or to photograph the restoration process
- Consultancy support in developing church tourism related materials
- Equipment such as laptops, projectors, Personal Protective Equipment or maintenance boxes
- Translating materials into community languages for tourists or new demographic groups
- Heritage related games or puzzles
- Exhibitions or oral histories that tell stories related to the history of the church
- Artists to support volunteers or young people creating art works that interpret the heritage of the church
- Heritage skill demonstrations and hands on days (e.g. stone masonry, stained glass repair)
- Performances of music, poetry readings, plays related to the history of the church or the people associated with the church
- Architectural modelling related to key design features in the church



THE CHURCH OF ENGLAND



National Churches Trust

7f. Delivery phase – other costs.

Cost Heading	Description	Cost	VAT	Total
Recruitment	Local papers, website	250	50	300
Publicity and promotion	Banners, posters, launch event, professional photography.	2000	500	2500
Evaluation	Consultant (report writing and training for volunteers) 5 days x ££350/day)	1750		1750
Other costs				
Full Cost Recovery				
Contingency	10% contingency on capital works = £11500 + 5% contingency on activity costs =£940	12440	2488	14928
Inflation	4.5% on capital (£5175), 2% on activity costs (£376)	5551	1110	6661
Increased management and maintenance costs (maximum five years)	£800/year x 5 years (for gutter clearance contract)	4000	800	4800
Non-cash contributions				
Volunteer time	Project team support (19 meetings with 4 professionals (£1400 x 12 months), Volunteered time for additional maintenance (3 x 12 x £150/day), for developing interpretation materials (2 x 5 x £350 day), for tour guiding and event support (24 x £150/day)	29300		29300
Total		55291	4948	60239

Other costs

- Do you need to recruit new staff, or will the tendering process for a contractor involve costs?
- Publicity – you will need to think about how you will publicise and acknowledge the HLF contribution, also include promotional materials directly relating to the project
- Evaluation – an important process – you could include costs for a community consultation here
- You should include a good contingency figure in case something goes wrong or additional works are required. As a guide, contingency of 10-15% could be included against capital works, and 5-10% against activity costs
- Capital inflation is running ahead of the rate of CPI inflation. Ask your architect or QS to give you the current rate of inflation related to capital builds. As a guide, inflation should be 3-5% on capital, and 0-2% on activity costs
- Increase maintenance costs – for regular maintenance into the future
- Volunteer time can be included and is categorised into professional, skilled and unskilled (see HLF guidance for more on this)

Example

Refer

7g. Delivery-phase income.

Source of funding	Description	Secured?	Value
Local authority	East Lindsey District Council	No	5000
Other public sector			
Central government	LPWGS VAT rebate on capital costs	No	22100
European Union			
Private donation - Individual			
Private donation - Trusts/Charities/Foundations	Organisations associated with Tennyson (£5000), NCT (£10,000), Garfield Weston (£10,000)	No	25000
Private donation - corporate			
Commercial/business	local business sponsorship	No	1000
Own reserves	Fabric Fund	Yes	5000
Other fundraising	coffee mornings, Tennyson teas and garden openings, school recitals, music recitals	No	2000
Increased management and maintenance Costs (maximum five years)	Funds from Fabric Fund for gutter clearance and minor maintenance works over 5 years	Yes	4800
Non-cash contributions			
Volunteer time	Project team support (19 meetings with 4 professionals (£1400 x 12 months), Volunteered time for additional maintenance (3 x 12 x £150/day), for developing interpretation materials (2 x 5 x £350 day), for tour guiding and event support (24 x £150/day)	No	29300
HLF grant request			136400
Total			230600

Example

As with 7b

You are likely to be asking most grant givers for funding for the repairs stage rather than development works.

Include the Listed Places of Worship grant here at 100%

you are not required to have your delivery phase match funding in place at the time of the Round 1 assessment.

Large amounts of unsecured funding can affect the risk scores for the project, so be clear how you will raise the match funding. Having fundraising support or training in the development phase can help reduce your risk scores

7h. Delivery-phase financial summary.

Total delivery costs	230620
Total delivery income	94200
HLF delivery grant request	136400
HLF delivery grant %	59

Example

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

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

Securing funds – explain that most grant givers have various deadlines and would expect to hear whether the HLF are awarding a grant before they offer a contribution.
List the funders you will be applying to and when you expect to hear from them.
Refer to the Charitable Grants for Churches document on your local diocese or NCT website

Reference

Section eight: Additional information and declaration

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

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

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

Fill this section in based on the make-up of the PCC/church rather than the individual filling in the form

Ethnic group

Asian	Black	Chinese	Mixed	White
Asian British	Black British	Chinese British	White and Black Caribbean	White British
Asian English	Black English	Chinese English	White and Black African	White English
Asian Irish	Black Irish	Chinese Irish	White and Asian	White Irish
Asian N Irish	Black N Irish	Chinese N Irish	Other	White N Irish
Asian Scottish	Black Scottish	Chinese Scottish		White Scottish
Asian Welsh	Black Welsh	Chinese Welsh		White Welsh
Bangladeshi	Caribbean	Other		Other
Indian	African		Arab	
Pakistani	Other			
Other			Irish travellers (Northern Ireland only)	

Age

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

Disabled people (people with physical or mental problems which have significant and long-term negative effects on their ability to carry out normal day-to-day activities)

Marital or civil-partnership status

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

People with dependants

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

People in lower socio-economic groups

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

Political opinion (Northern Ireland only)

Nationalists/Republicans	Unionists	Other
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Religious belief

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

Gender

Males	Females	Transgender people
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Sexual orientation

Gay and lesbian people	Heterosexual people	Bisexual people
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Declaration

a) Terms of Grant

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

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

b) Freedom of Information and Data Protection

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

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

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

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

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

Continued...

Declaration (Continued)

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

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

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

I confirm that the activity in the application falls within the purposes and legal powers of the organisation (the legal document setting out the rules governing the organisation).

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

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

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

I confirm that I agree with the above statements.

Do you agree with the above statements?

Yes

No

Name _____

Organisation _____

Position _____

Date _____

Main grant contact signs this (i.e. you and not your architect).



Section nine: Supporting documents

Development Phase timetable - expenditure

7a	Expenditure	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Total
Professional fees	Further detailed investigations to north aisle roof structure/tower roof/tower parapet gutter		4,000.00										4,000.00
	Ecologist to identify any bats present			500.00									500.00
	Architect's fees @ 11% (60% of total costs RIBA stage 4)			2,046.00				2,046.00			2,046.00		6,138.00
	Maintenance Plan									350.00			350.00
	Access Audit			350.00									350.00
Other	Taster heritage activities	1,000.00					1,000.00						2,000.00
Contingency	Unexpected costs i.e. bat licence, additional investigation works to stonework/ below ground drainage								2,000.00				2,000.00
Non-cash contributions	Partnership - Diocesan support during development @£150 per day x 3 days	150.00			150.00			150.00				150.00	600.00
Volunteer time	See separate table	250.00		250.00		250.00		250.00		250.00	250.00		1,500.00
	VAT		800.00	579.00				409.00	0.00	70.00	409.00		2,267.00
TOTAL	TOTAL	1,400.00	4,800.00	3,725.00	150.00	250.00	1,000.00	2,855.00	2,000.00	670.00	2,705.00	150.00	19,705.00
											Total	19,705.00	

Development Phase timetable - income

7b	Income	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Total
Local Authority													
Private donation - individual	Private donations												
Private donation													
Trusts/Charities/Foundations													
Private donation - Corporate													
Commercial / business													
Own reserves	PCC Fabric fund	1,038.00											1,038.00
Other fund raising	LPWGS VAT reclaim					1,133.00						1,134.00	2,267.00
Non-cash contributions	Diocesan support	150.00			150.00			150.00			150.00		600.00
Volunteer time	Volunteer time	200.00	200.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	200.00	200.00	1,500.00
	50% HLF funding	7,150.00											7,150.00
	40% HLF funding						5,720.00						5,720.00
	10% HLF funding											1,430.00	1,430.00
TOTAL	TOTAL	8,538.00	200.00	100.00	250.00	1,233.00	5,820.00	250.00	100.00	100.00	350.00	2,764.00	19,705.00
											Total	19,705.00	

Development phase timetable - cash flow

Accumulative income	8,538.00	8,738.00	8,838.00	9,088.00	10,321.00	16,141.00	16,391.00	16,491.00	16,591.00	16,941.00	19,705.00	
Accumulative expenditure	1,400.00	6,200.00	9,925.00	10,075.00	10,325.00	11,325.00	14,180.00	16,180.00	16,850.00	19,555.00	19,705.00	
Balance	7,138.00	2,538.00	-1,087.00	-987.00	-4.00	4,816.00	2,211.00	311.00	-259.00	-2,614.00	0.00	

7c	Total development costs	19,705.00
	Total development income	5,405.00
	HLF development grant request	14,300.00
	HLF development grant %	73%

Spreadsheet detailing the cost breakdown in Section 7: Project Costs

You will need to produce a separate spreadsheet that sets out all the costs you have included in your application in section 7, but in greater detail. This can be done as an excel spreadsheet.

Many of these costs will be estimates but the key is to be as accurate as possible. Give approximations based on the costs in your Quinquennial Inspection, average grant awards from charitable bodies and any quotes you already have from contractors.

Section nine: Supporting documents

Delivery-phase timetable - capital costs

7d	Expenditure	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Total
Repair and conservation works	Scaffold and undertake repairs/rebuilding to west parapet wall of tower, tower window tracery / tower roof repairs as required		15,000.00			15,000.00									30,000.00
	Strip existing north aisle roof, undertake timber repairs and rebuilding/repair of parapet gutter and high level stonework.					20,000.00		23,000.00							43,000.00
	Repair cast iron rainwater goods and below ground stormwater drainage									3,000.00					3,000.00
	Structural repairs to nave ceiling										3,000.00				3,000.00
New building works	Install new wc in base of tower					2,000.00							6,000.00	6,000.00	14,000.00
	Architect's fees @ 11% (40% of total costs RIBA stage 6)			1,364.00				1,364.00					1,364.00		4,092.00
Professional fees	Structural Engineer		750.00					750.00							1,500.00
	CDM	500.00					500.00								1,000.00
	VAT	100.00	3,150.00	273.00		7,400.00	100.00	5,022.00		600.00	600.00		1,473.00	1,200.00	19,918.00
	TOTAL	600.00	18,900.00	1,637.00	0.00	44,400.00	600.00	30,136.00	0.00	3,600.00	3,600.00	0.00	8,837.00	7,200.00	119,510.00

Delivery -phase timetable - income (please note sections 7e and 7f have been omitted from this example)

7g	Income	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Total	Secured
Private donation - Trusts/ Charities / Foundations	All Churches Trust		1,000.00												1,000.00	No
	Alan Evan Memorial Trust	1,000.00													1,000.00	No
	Garfield Weston	1,000.00													1,000.00	No
	J W Wright	1,000.00													1,000.00	No
	Marshall's Charity			1,000.00											1,000.00	No
	Lincolnshire Churches Trust				2,000.00										2,000.00	Yes
Private donations - individual	Donations													0.00		
Own reserves	PCC fabric fund	2,500.00					2,592.00								5,092.00	Yes
Other fund raising	Income from heritage events and talks (donations and refreshments)					500.00									500.00	No
	LPWGS VAT reclaim							9,959.00					9,959.00		19,918.00	No
Increased management & maintenance costs (5 years)	Funds to cover maintenance for the next 5 years from PCC reserves - £300 p/a													1,500.00	1,500.00	Yes
Non-cash contributions	Diocesan support during delivery phase @ £150 per day x 4 days	150.00			150.00			150.00					150.00		600.00	Yes
Volunteer time	See separate table	200.00	200.00	100.00	100.00	100.00	200.00	200.00	200.00	100.00	100.00	100.00	200.00	200.00	2,000.00	No
50% HLF funding		55,200.00													55,200.00	No
40% HLF funding							44,160.00								44,160.00	No
10% HLF funding														11,040.00	11,040.00	No
TOTAL		61,050.00	1,200.00	1,100.00	2,250.00	600.00	46,952.00	10,309.00	200.00	100.00	100.00	100.00	10,309.00	12,740.00	147,010.00	

Delivery phase timetable - cash flow

Accumulated income	61,050.00	62,250.00	63,350.00	65,600.00	66,200.00	113,152.00	123,461.00	123,661.00	123,761.00	123,861.00	123,961.00	134,270.00	147,010.00
Accumulated expenditure	1,050.00	21,150.00	22,887.00	26,837.00	71,377.00	72,137.00	103,223.00	107,723.00	111,423.00	115,623.00	115,723.00	126,310.00	147,010.00
Balance	60,000.00	41,100.00	40,463.00	38,763.00	-5,177.00	41,015.00	20,238.00	15,938.00	12,338.00	8,238.00	8,238.00	7,960.00	0.00

7h	Total delivery costs	147,010.00
	Total delivery income	36,610.00
	HLF delivery grant request	110,400.00
	HLF delivery grant %	75%

Spreadsheet detailing the cost breakdown in Section 7: Project Costs

You will need to produce a separate spreadsheet that sets out all the costs you have included in your application in section 7, but in greater detail. This can be done as an excel spreadsheet. Many of these costs will be estimates but the key is to be as accurate as possible. Give approximations based on the costs in your Quinquennial Inspection, average grant awards from charitable bodies and any quotes you already have from contractors.

Section nine: Supporting documents

Please provide all of the documents listed at each round, unless they are not applicable to your project. These should all be provided in digital format.

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, Church of Ireland, Church of Scotland, Episcopal, The Representative Body of the Church in Wales, 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. Spreadsheet detailing the cost breakdown in Section seven: Project costs.
8. Calculation of Full Cost Recovery included in your development costs (if applicable).
9. A letter of support from the person with overall responsibility for your place of worship. See Appendix 6: Letter of Support.

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.

Supporting Documents

Constitution; a copy of your church's mission statement would be appropriate here
Accounts; for the latest financial year, these should have been independently examined
Photographs; good quality, general and detail
Condition survey; this will be a copy of your Quinquennial Inspection/most recent condition report and must have been carried out within the last five years. It should also demonstrate that the works requested are urgent within the next two years

Letter of support – This should be a letter from your Archdeacon/equivalent, and should cover;

- Whether there is financial need for HLF support - if you have a large congregation in a wealthy area, you will be less likely to attract a grant (according to the HLF) – see hotspots
- Whether there is support for the congregations continued use of the building – there must be no plans for the building to cease being used as a place of worship
- Whether there are any plans for pastoral reorganisation – for example boundary changes
- Whether the project meets a clearly identified need or opportunity

At Round 2, you will need to provide architectural plans to equivalent of RIBA Stage 4

PLEASE NOTE THAT THIS GUIDANCE IS NOT A SUBSTITUTE FOR READING THE HLF GUIDANCE DOCUMENT AND IS PURELY DESIGNED TO OFFER EXAMPLES TO HELP CHURCHES APPLY

The Diocese of Lincoln and the National Churches Trust are grateful to Rebecca Burrows and Ben Stoker, formally of the Diocese, as well as the Development Team at the HLF East Midlands region, for the work they did on the original version of this guidance, written in 2013.

The Diocese of Lincoln

The Diocese of Lincoln is blessed with some 738 churches, 630 of which are regularly used for worship. The Diocese of Lincoln Church Buildings Department exists to support parishes to maintain and cherish these beautiful churches. The Diocesan Advisory Committee for the Care of Churches (DAC) will be the first port of call for many enquiries regarding the ongoing care and maintenance of church buildings, such as questions about repair, re-ordering and/or extensions. The DAC can offer advice about finding an approved architect to undertake quinquennial inspections and it also acts as the statutory body advising the Chancellor and Archdeacons of the Diocese regarding the granting of Faculties for works to be undertaken to church buildings.

The Church Buildings Department also has two Historic Churches Support Officers whose roles are to give every parish access to advice, support and encouragement as they engage with their church building, whether it's guidance on gutters, or grant application advice. The Historic Churches Support Officers work closely with, but separately from, the DAC. Three key areas of support available are:

- Maintenance: assistance developing a maintenance plan, direction on general maintenance work, or for resources such as maintenance calendars or training days.
- Fundraising: help to develop a fundraising strategy, access up to date information regarding charitable trusts and advice on how to apply for grants.
- Heritage: historical information, insight into the art, archaeology and architecture of church buildings, advice on interpreting churches through guide books or guided tours, or for other ways of developing the building's heritage potential.

Contacts

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www.nationalchurchestrust.org



The National Churches Trust

The National Churches Trust supports and promotes church buildings of historic, architectural and community value through fundraising, advice and grant-giving. We are the independent, UK-wide charity supporting over 42,000 churches, chapels and meeting houses of all Christian denominations. We believe that places of worship are an integral part of our nation's architectural heritage and play a vital part in building and sustaining local communities. www.nationalchurchestrust.org

We currently have four grants programmes supporting urgent structural repairs and the introduction of facilities in Christian places of worship. These are:

Our Repair Grants programme; grants of £10,000 to £40,000 towards the cost of urgent and essential structural repair projects, i.e. essential works to the fabric of the building. Projects must have an estimated cost of at least £100,000 (incl. VAT and fees) to qualify. A limited number of £40,000 'Cornerstone' grants are available.

Our Community Grants programme; grants of £10,000 to £25,000 towards the cost of capital works such as additions and extensions and the introduction of facilities, such as toilets and catering facilities. Projects must have an estimated cost of at least £25,000 (incl. VAT and fees) to qualify. This year we are able to offer an additional £2,000 to churches interested in setting up a social action project in partnership with the Cinnamon Network.

Our Partnership Grants programme; grants of up to £10,000 to projects costing under £100,000 (incl. VAT and fees) in partnership with 26 local churches trusts who make recommendations to us. Awards are made quarterly.

Our Project Development programme; grants of £3,000 - £10,000 to support churches to become more sustainable through the diagnosis of issues affecting the church, testing the viability of proposed solutions to improve sustainability and the development of guiding policies and plans that will be implemented through an application to the Heritage Lottery Fund or other large church heritage funders. This a limited pilot programme open in June 2016, with decisions made in December 2016.

The programmes are open to listed and unlisted churches, chapels and meeting houses in England, Wales, Scotland and Northern Ireland which are open for worship and which are part of a denomination belonging to Churches Together in Britain and Ireland. Applicants need to show that 50% of the project cost has already been raised and the project needs to be taking place within the building or as an extension to it, but not a separate building. It also needs to have been built as a place of worship. Applications must be made before works start.

Full guidance notes can be found on the grants pages of our website:

www.nationalchurchestrust.org/our-grants

