

Application questions

This page includes the questions we ask in the application. We have also provided guidance which we recommend you refer to when answering them.

You must submit an [Expression of Interest](#) before making a full application.

When you are ready, please complete your application on our [online service](#).

What is the title of your project?

Give us a title or name we can refer to your project by.

You may wish to include the name of the buildings, land or heritage items your project focuses on in the title. We encourage you to keep it short and descriptive.

This will be seen by our decision makers, and if your application is successful, will be used in any public posts made about your project and will be published on our website. Make sure you choose a title that you are happy for a wide range of people to see.

Give us a summary of your project

Briefly tell us about the heritage you want to save, its importance and how your project will safeguard it.

About your organisation

Tell us your organisation's address

You will need to provide your:

- street name
- town or city
- county
- postcode

Is your project's address the same as your organisation's address?

Your project may be taking place somewhere different than your organisation. Tell us where that is. We understand that you might not have a postcode. Tell us the closest postcode to your project's location.

Describe your organisation and the work your organisation does

You will need to tell us about:

- your organisation's day to day activities
- your mission and purpose

Tell us the legal status of your organisation

The types of organisation you will be able to select from are:

- Local authority
- Other public sector organisation, such as a school or a university
- Not-for-profit organisation not in the public sector

If you are a registered company, you will need to tell us your company number.

If you are a registered charity in England, Scotland, Wales or Northern Ireland, you will need to tell us your charity number.

Is your organisation VAT registered?

If so, you will need to tell us your VAT number.

About your project

Tell us about the heritage your project will focus on

Provide us with factual information about the heritage.

This can include:

- the name of the buildings, land or heritage items
- the date it was built or created

- the artist, designer, maker or author
- the medium it is in
- the style it is in
- the size of the buildings, land or heritage items
- a summary of the condition of the buildings, land or heritage items
- any surviving or notable features

Will you be acquiring any buildings, land or heritage items as part of your project?

If so, you will need to select the tick box.

If your project involves buying buildings, land or heritage items, provide details about the sale

If so, you will need to tell us about:

- the details of any auction sale or private sale which has been agreed
- any deadlines relating to the sale, such as auction dates, export deferral deadlines or deadlines set in the Treasure process
- how the buildings, land or heritage items you wish to acquire are being offered for sale
- the process you will need to follow to acquire them
- details of any purchase price advertised or set, including auction estimates
- the details of the freehold interest or lease (any lease must have at least 99 years left to run)
- the provenance of the buildings, land or heritage items and where they are currently located

If your project involves buying buildings, land or heritage items, provide details about the valuation

If so, you must provide an independent valuation for the buildings, land or heritage items. You must have commissioned this yourself and it must demonstrate that the price you propose to pay represents its market value.

A copy of the independent valuation should be submitted as a supporting document.

Valuations are not required for export stopped items or those declared Treasure. This is because the value has already been fixed.

For items being purchased through a private treaty sale, your valuation must show that the gross price on which the calculation is based represents market value.

The Memorial Fund will also seek our own independent valuation as part of our assessment to verify the price. We cannot support acquiring buildings, land or heritage items where the price is greater than the market value.

Will your project involve work to physical heritage, such as buildings, landscapes, habitats or collections?

If so, you will need to select the tick box.

You will then need to tell us:

- if the building, land or heritage item is owned by:
 - your organisation
 - a project partner
 - neither
 - not applicable
- if there any legal conditions, restrictions or covenants associated with the heritage which may affect your project
- if a condition survey has taken place in the last five years
- if applicable, a grid reference for landscapes

Our assessment standards

Importance to UK heritage: how are the buildings, land or heritage items of importance to UK heritage?

Your project must involve buying, maintaining or preserving buildings, land, objects or collections that are of high importance to UK heritage. You must explain why you believe the items that you are seeking funding for are important to UK heritage.

If it is important to the heritage of any of the four nations, we consider it to be of importance to UK heritage.

Buildings, land or heritage items may be significant because:

- they have been in the UK for many years and have a strong historical connection
- they may have a strong connection to UK culture
- they may be associated with a historic event, movement or artistic style
- the items represent a technological achievement or important moment in industrial history
- if land, it preserves nature, archaeology or biodiversity which is unique to the UK

You should also tell us about any designations or recognition, which reflect its importance to UK heritage.

This can include:

- Grade I and Grade II* listed buildings in England and Wales
- Category A and B+ listed buildings in Scotland and Northern Ireland
- Registered Parks and Gardens
- Scheduled Monuments
- Designated and Recognised Collections
- National Parks and Landscapes
- Site of Special Scientific Interests (SSSI)
- National Historic Fleet vessels

If it is not designated or recognised, tell us more about why it is important to UK heritage rather than to a local area or region.

Outstanding interest: how are the buildings, land or heritage items of outstanding interest?

The buildings, land or heritage items that are the focus of your project must also be of outstanding interest. You must explain why you believe the items you are seeking funding for are of outstanding interest.

This could be because of rarity, quality, cultural value or association with a historic figure or event.

This could include:

- land of outstanding scientific, scenic, ecological, archaeological or historic interest, or land that is the site of an outstanding building or area
- buildings of outstanding aesthetic, architectural, historic, engineering or scientific interest, including bridges, piers and other built structures

- objects of outstanding aesthetic, historic, artistic, technological, archaeological or scientific interest, including works of:
 - fine and decorative art
 - textiles
 - books or manuscripts
- industrial, transport and maritime heritage items
- collections which taken as a whole demonstrate outstanding scientific, historic or artistic interest, where you believe it is important to keep items or objects together to maintain important historic connections and completeness

You should also tell us about any key dates or milestones which are relevant to or related to the heritage.

At risk: how are the buildings, land or heritage items at risk of loss?

You must tell us how the buildings, land or heritage items you are seeking our funding for are at risk of loss should your application not be funded.

At risk could mean risk of physical loss, if the heritage is about to be damaged, destroyed or developed in an inappropriate way. It could also mean risk of the heritage being lost to UK public access.

Heritage may be at risk of loss because of:

- physical damage or neglect
- loss of access to the UK public, including through export
- destruction or deterioration

Last resort: why do you need Memorial Fund support to safeguard the buildings, land or heritage items?

As the Memorial Fund is a fund of last resort, you must tell us why our funding is essential for your project to happen. You must show that support from the Memorial Fund is the last chance for the heritage to be saved.

This should include:

- who else you have approached for safeguarding support and why you approached them
- if other support has or has not been possible, and the reasons why

- what other strategies and options you have explored
- why other strategies and options were not appropriate

What other funding options have you considered?

The Memorial Fund is a fund of last resort and has limited resources. You must tell us about all other funding sources that you have considered, including any partnership funding.

This should include any funding:

- you have secured to help towards the cost of your project
- you have applied for or are planning to apply for to support this project
- will raise through fundraising or crowdsourcing
- can provide from your own reserves or budgets

The Memorial Fund can only fund the total cost of your project in exceptional circumstances. Higher priority is given to applications that strongly meet our assessment standards and that demonstrate every effort has been made to reduce the total grant request.

If applicable, you should explain why you are not able to raise any other funding from either your own resources or other sources.

How will the public access the buildings, land or heritage items?

The Memorial Fund expects that the public will be able to access the heritage that it funds. You must tell us how the public will access the buildings, land or heritage items.

This could include:

- opening the heritage up for the public to visit or putting it on display
- events, activities or visits
- educational resources
- digital outputs, like online resources or exhibitions

You should also tell us:

- how many visitors you expect to engage
- the number of days per year the heritage will be accessible
- if applicable, the admission fee that you will charge

We recognise that conservation needs may restrict public access. In these cases we expect you to provide alternative ways for the public to access the heritage, for example online resources or virtual exhibitions.

Managing your project

Why is your organisation best placed to deliver this project?

You must tell us why specifically your organisation is able to deliver this project at this time.

This may include:

- your organisation's experience with this type of heritage or similar heritage
- staff, Board members or Trustees' knowledge and skills
- your organisation's capacity to deliver the project at the same time as your usual work
- your connections with other relevant organisations

How will you deliver your project?

You must tell us how your project will be managed day to day.

This should include telling us:

- the roles and responsibilities of the people involved
- who will be responsible for making decisions
- about your project's reporting structure

Will your project be delivered by a partnership?

If so, you must tell us who your partners are, the nature of your partnerships and how you will work together.

Tell us about the risks to your project

We recognise that all projects face risks. We want to see how you have planned for any risks that you may face during your project, and how you will manage them.

These risks could include:

- encountering difficulties in delivery of capital works
- restrictive deadlines or potential delays
- a reduced partnership funding
- a shortage of people with the skills you need or staff needed to work on other projects
- an unexpected rise in the market value of the items you need to buy for your capital project
- a significant change in the project team
- changes in law that make the project impractical
- difficulties in finding sources of timber from well managed forests

You will need to enter each risk into the table separately, telling us:

- what the risk is
- the likelihood of the risk occurring
- how this will impact your project
- how you will handle the risk
- who will lead on this

We expect you to continue to review and manage risks throughout the delivery of your project.

When do you expect your project to start and finish?

You will need to give us a start and end date for your project.

After your project ends

How will you care for and manage the heritage?

As the Memorial Fund terms of grant last in perpetuity, you must tell us about your organisation's long term plans to care for and manage the heritage.

This should include how your organisation will:

- provide an appropriate and permanent home for the buildings, land or heritage items
- provide appropriate care and conservation for the heritage
- continue to meet our terms of grant and any additional grant conditions
- meet any additional costs involved
- meet any changes needed to its organisational structure or capacity

- maintain public access to the heritage

Tell us about the risks to your project after it has finished

We want to see how you have planned for any risks that you may face after your project ends, and how you will manage them.

This should include telling us what will happen to the buildings, land or heritage items if your organisation is no longer able to care for them.

You will need to enter each risk into the table separately, telling us:

- what the risk is
- the likelihood of the risk occurring
- how this will impact your project
- how you will handle the risk
- who will lead on this

How will you evaluate your project?

We encourage you to evaluate your project. You should tell us how you would approach and plan for evaluation.

This could include:

- any evaluation methods you may use
- how you would share your learning with other organisations

Your project costs

Tell us about your project costs

You must demonstrate how you have calculated your project costs.

This should include showing how:

- you have fully and accurately estimated the costs
- they are informed by professional advice
- they represent value for money

Add your project costs

You must provide a summary of your project costs, using a single line for each cost heading. If your project includes capital works, you will also need to provide a separate spreadsheet as a supporting document. This must show how these summary costs are broken down.

You will need to enter each cost into the table separately, telling us:

- the cost heading
- a description of the cost
- the amount, without VAT
- if relevant, the VAT amount

VAT

- should only be included in the VAT column
- if included, must be clearly shown on all quotes
- cannot be paid on certain types of work or may be paid at a lower rate – it is your responsibility to approach HM Revenue & Customs to understand VAT and VAT rates
- if your VAT status changes during your project we will reduce our contribution to the costs where you have been able to claim back the VAT and you will need to return this to us
- if you spend less on VAT, you can ask our permission to transfer the underspend to another cost heading. You will need to demonstrate a clear need for this change.

Cost headings

Purchase price of items or property:

- Only include the purchase price of the buildings, land or heritage items.

Repair and conservation work:

- Include costs for repairing or conserving the buildings, land or heritage items.

Fees:

- Include all fees directly related to purchasing the buildings, land or heritage items.
- This can include:
 - agents' fees

- the buyer's premium for sales at auction
- conservation reports
- Only fees incurred by your organisation as the buyer are eligible - you cannot include fees incurred by the seller.

Other:

- Include costs that do not fit within any of the other cost headings, for example:
 - non-reclaimable VAT
 - transport costs
 - travel
- Make sure you give a clear description of what these costs are.

Professional fees relating to any of the above:

- Include costs for any services you will need to pay for during your project.
- Fees should be in line with professional guidelines and based on quotes from the professional or professional body you are paying.

Add any partnership funding

You should add all sources of partnership funding and select whether these are secured or not. All partnership funding must be in the form of cash contributions. By secured we mean that you have cash in your bank account reserved specifically for this project, or the money has been formally offered.

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

Funding from The National Lottery Heritage Fund cannot be used as partnership funding in applications to the Memorial Fund.

The sources of partnership funding you will be able to select from are:

- Local authority
- Other public sector
- Central government
- Private donation from an individual
- Private donation from a trust, charity or foundation

- Private donation from a corporate organisation
- Commercial or business
- Own reserves
- Other fundraising

If you have unsecured partnership funding, how and when do you expect to secure this?

- If so, you should tell us:
- who you expect the funding from
- how much you are expecting
- when you expect it receive it

Additional information and declaration

You will be asked to read and agree to our declaration.

Data Protection

We are committed to being as open and transparent 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. We follow all data protection laws and regulations that are applicable and in force from time to time (the 'Data Protection legislation' 'or UK GDPR'). As defined by the Data Protection legislation the Trustees of the National Heritage Memorial Fund is a data controller. Our Privacy Policy contains additional information including contact information for our Data Protection Officer. It can be found on the National Heritage Memorial Fund website.

As part of the application process we will collect your name, contact information and position at the organisation you represent, as well as any additional personal information you supply about others involved in your project. We may share this information with consultants if they are appointed to help us assess your application.

We may use your application form and other documents you give us, and the data contained within:

- To decide whether to give you a grant.
- To provide copies to other individuals or organisations who are helping us to assess, monitor and evaluate grants.

- To share information with organisations and individuals working with us with a legitimate interest in National Heritage Memorial Fund applications and grants.
- 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 preserve the nation's heritage by contributing (when asked) to publicity activities and participating in activities to share learning, for which we may put other grantees in contact with you. This may include sharing your information and any subsequent publicity with third party partner distributors.

Freedom of Information

As a public organisation we are subject to the Freedom of Information Act 2000 and Environmental Information Regulations 2004 which give the public a right of access to the information that we hold, unless any exemptions apply. This includes any recorded information provided to us by our applicants and grantees.

When you complete this Declaration, you are confirming that you have no objection to us releasing the application form and any other information you provide to us to anyone who asks to see them once your application has completed the assessment process. If there is any information that you don't want made publicly available, please explain your reasons below:

(You will be able to explain your reasons here.)

If we receive a request for information we will always consult you first and will take your comments into account and will apply the exemptions in the Freedom of Information Act 2000 and Environmental Information Regulations 2004. However, the decision to release or withhold your information is our decision and we will not be responsible for any loss or damage you suffer as a result of our meeting these responsibilities.

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

- I confirm that the organisation named on this application has given me the authority to complete this application on its behalf.
- I confirm that the activity in the application falls within the purposes and legal powers of the organisation.
- I confirm that the organisation has the power, if awarded, to accept a grant under certain conditions and to pay back the grant if it does not meet the grant conditions.
- I confirm that, as far as I know, the information in this application is true and correct.
- I consent to my personal data being used as described and understand that should the requirement change from that described I will be informed at the earliest reasonable time.

Supporting documents

You will need to provide relevant supporting documents for your application.

For all applications

Governing document

You must provide your organisation's governing document, for example a constitution, trust deed, memorandum or articles of association.

You must have at least two people on your board or management committee who are not related by blood or marriage, or living at the same address.

Your governing document should include the following:

- the legal name and aims of your organisation
- a statement that prevents your organisation from distributing income or property to its members during its lifetime
- a statement which confirms that, if your organisation is wound up or dissolves, the organisation's assets will be distributed to another charitable or not-for-profit organisation and not to the organisation's members
- the date when it was adopted and the signature of your chairperson or other authorised person

We are unable to fund your organisation if your constitution does not include the above. The [Charity Commission](#) provides guidance on creating a governing document.

We do not need to see your governing document if you are:

- a public organisation, for example, a local authority or university
- a charity registered with the Charity Commissions for England, Wales or Northern Ireland, or the Scottish Charity Regulator

Accounts

You must provide your organisation's most recently audited or accountant verified accounts.

Accounts need to:

- be in the legal name of your organisation
- be dated
- be signed with a handwritten signature (this does not include digital signatures)
- include the title of the person who is signing them - this person must be a director, trustee, accountant, or other senior figure in your organisation

If your organisation's accounts are older than 18 months, you must also provide three months of your most recent bank statements. This should be the three months before the date you submit your application.

If your organisation was set up less than 14 months ago and does not have a set of audited accounts, you must provide your last three bank statements or a signed letter from your bank confirming that your organisation has opened a bank account.

We do not need to see your accounts if you are a public organisation, for example a local authority or university.

Revenue budget

If your organisation is a public organisation, for example a local authority or university, you must provide details of your department or faculties revenue budget. This should include the last three complete financial years and the current financial year.

Public liability insurance

If applicable, you must provide a copy your organisation's public liability insurance.

Main contact confirmation

You must provide confirmation that you, as the main contact, have the authority from your organisation to make this application.

Images

You must provide a small selection of images that help illustrate your project.

This could include:

- recent or historic images of the buildings, land or heritage items
- plans, drawings or blueprints
- a map showing the locations involved in your project

Make sure you have all the permissions required to share these with us, as we may use these to tell people about your project, including our decision makers. We might also use any images you send us to promote your project publicly.

Additional heritage information

You must provide additional information about the heritage. This should demonstrate the buildings, land or heritage items importance to UK heritage and its outstanding interest.

This could include:

- published articles
- exhibition catalogue entries
- an extract from the sale catalogue if the item is being sold at auction

For applications to acquire buildings, land or heritage items

Acquisitions and disposals policy

You must provide a copy of your acquisitions and disposals policy.

Lease

If you are buying a leasehold property, you must provide a copy of the lease.

Condition report

You must provide a condition report or another appropriate document to tell us the current condition of the buildings, land or heritage items. It should also outline the works that are needed to return the buildings, land or heritage items to a good condition.

The report should also indicate the relative priority of the proposed works so you know which are the most critical and need to be tackled most urgently.

There are other types of survey which may be relevant to include as part of a condition report, such as a building performance and energy efficiency survey or a site survey.

Independent valuation

You must provide an independent valuation for the buildings, land or heritage items. It must also demonstrate that the price you propose to pay represents its market value.

For applications which include capital works

Project timetable

You must provide a timetable covering the whole of your project. It should also include references to key events and milestones.

Project cash flow

You must provide a complete overview of the cash flow of your organisation throughout the duration of your project.

Income and spending forecasts

These should cover the duration of the project and five years after the project ends.

Project management structure

This document should explain the management structure of your project. It should also include decision-making processes, lines of communication and reporting.

A spreadsheet detailing the costs you outlined when completing the project costs section. These should be supported by professional advice and quotes for work.

Briefs for commissioned work

Briefs describe any work you plan to buy in during your project.

If you are commissioning work, for example, from an artist or architect, then you must provide a brief. The brief should describe the works, how long they will take, how much they will cost and the skills required.

Proof of ownership

Copies of deeds, leases, mortgages or other proof of ownership for the buildings, land or heritage items. This could be Land Registry ownership documents, or a lease or heads of terms.

Partnership agreement

If applicable, a partnership agreement. This document should outline all partner's roles and responsibilities and should be signed by all parties. This document should reflect the needs of your project and you may need to seek independent advice on how to best write an agreement.