



Writing HLF Project Bids

Introductory guidance

October 2017

1.0 Overview

This guidance derives from a 'cohort' project run by SHARED Enterprise with a small group of museums between September 2016 and February 2017. This particular cohort project comprised a series of three workshops and 1:1 visits to each museum by the training lead. At the end of the process, each museum taking part had part-prepared a project to take forward to the Heritage Lottery Fund.

Drawing on the workshops, this guidance give some basic ideas and approaches on how to develop a project that is fit for funding. Although aimed at those looking to develop bids for the HLF, these tips are useful for any project for which your organisation may be seeking grant funding.

2.0 Understand/review your organisation's vision

Everything your museum or organisation does, should be delivering against its Vision. Your Vision is the overarching strategic statement or direction of travel that your organisation is seeking to achieve. It should be inspirational for your staff, volunteers, and your visitors. It should be about the future, a place you are constantly striving to reach – and it should be short!

For example, the Tate's Vision is: *Championing art and its value to society*. In their discussion of their vision, they are clear this is not a programme or set of principles that will guide them in place of a business plan, but rather, it is 'intended as a framework for planning...'. Their Vision informs their work.

Similarly, the National Museums of Scotland's Vision is: *Inspiring people, connecting Scotland to the world and the world to Scotland*. It is short and aspirational – it is about their overarching ambition.

Below your organisation's Vision, you may have a more detailed, longer mission statement. In the case of the National Museums of Scotland, the mission statement is: *We preserve, interpret and make accessible for all, the past and present of Scotland, other nations and cultures, and the natural world*. This is different to their Vision – it serves their Vision.

Before you undertake any project planning it is important that as an organisation, or as part of a project planning team, you re-familiarise yourself with your organisation's Vision. You might find your starting point is to review your Vision before you start working on a project!

Any projects you go onto develop will help you deliver your Vision, and your organisation will become more coherent as a result.

3.0 Define your funding priorities

With clarity of Vision, you will need to go on and consider your funding priorities. This information is likely to be in your strategic, forward or business plan. You may have

many different priorities from funding the day-to-day running of your organisation through to undertaking a major redevelopment project, and anything in between. If you are looking to apply for HLF funding, it is likely that you will be looking to fund a distinct project. This project may fulfil needs around sustainability in the longer term, i.e. a new shop and gallery may be designed to increase visitor engagement, visitor footfall and spend, all of which may make your organisation more sustainable, but you would not be applying for revenue funding direct from HLF. In fact, there are very few funding bodies that provide money for day-to-day running costs. Generally, a grant giving body will fund 'one-off' projects – although a project can last for a number of years with HLF.

The museums that took part in the cohort project had a range of funding priorities, including:

- Undertaking collections development work
- Gallery redisplay
- Digitising and making accessible an archive
- Building an education space and developing a new learning and events programme
- Creating an entirely new museum!

4.0 Understand your funder

Having refreshed yourself of your Vision and defined your funding priority, which will now start to look like a project with a specific set of aims and objectives, it is key that you check the funder you are planning to approach will fund the kind of project you wish to undertake.

The Heritage Lottery run a range of grant schemes aimed at different priority areas. Some are looking for projects that are focused specifically on young people, some are focused on particular types of heritage, such as townscapes, parks and landscapes. Other grant schemes, such as Our Heritage and Heritage Grants have a broader remit in terms of the kinds of organisations and projects they will fund. At present, HLF also offer a Resilience Grant programme which support projects that might be aimed at governance reviews, feasibility studies or supporting organisational change.

Regardless of the funding scheme, the Heritage Lottery are looking for projects ***'that make a lasting difference for heritage, people and communities in the UK'***. This is key to all their programmes.

The HLF are also interested in understanding the need for your project, and keen to understand the **outcomes** your project will achieve.

The grant programmes that museums most usually look at are the Our Heritage Grant, and Heritage Grant programmes. These grants provide funding up to £100,000 and between £100,000 - £2m respectively. But, it is always useful to

explore their other grant programmes, it may be that your project idea will fit better elsewhere.

Whichever grant programme you feel is appropriate, it is important that you read through the guidance carefully and talk to HLF about your project. You can start your project by filling out a Project Enquiry Form on the HLF application portal. Once you have completed a Project Enquiry, they will provide feedback on your ideas. You can find contacts for HLF regional offices here: <https://www.hlf.org.uk/about-us/contact-us>

5.0 Undertaking consultation – strengthening your project

In order that your project is successful, it is important to consult on ideas and seek different opinions and advice. For example, if you are looking at making changes to your building, you might want to discuss your project with an architect or engineer to understand whether your plans are feasible. They may well have different ideas that inspire you.

If you are based in a heritage building, you might also want to speak to the planning department to check you can make changes to your space, and find out if you need planning permission or any other special permissions, such as Listed Building Consent.

The HLF are interested in the activities, or things you will do to engage people through your project. You might have lots of ideas based on your interests and interests of your colleagues. These could be anything from developing a new learning programme, community archaeology dig or initiating an annual arts and heritage festival, through to creating a new leaflet, volunteer programme or sculpture trail. Usually you will have a range of engagement activity ideas. However, before setting these in concrete, it is important to consult your users, and non-users where possible, on whether they would be interested in your activities. They might have other ideas, or might be able to help you develop activities more clearly. For example, if you are looking to develop a new learning programme aimed at schools, it would be useful to consult with teachers and children as to the kinds of things they would like to see your museum deliver.

You might want to invite people to your museum to hear about your project ideas, and invite feedback. You could trial new ideas and invite people to have a go, again inviting feedback. There might be particular people in your community you want to engage.

6.0 Refining your project

With a clear idea of the range of activities you wish to undertake, and any building works you might be doing, or interpretive/redisplay work, you can begin to plan your project in detail. You might want to think about the following:

- Do you need any additional staff to help deliver your project?
- Do you need to consider a training programme for current staff/new staff

- Will you need new volunteers?
- Will they need training?

All of these elements of your project will need to be defined as part of an 'Action Plan' where you will need to consider the running order of your project. For example, will you need to employ a new member of staff before you recruit new volunteers? If you are undertaking capital works, this usually takes place first, but there might be elements of your activity that run concurrently, such as volunteer training.

If you are applying to the HLF, it is important to consider how each activity, whether it is building work or a new public engagement programme, helps deliver their preferred outcomes.

7.0 Develop your budget

As you refine your project and develop a clear idea of what you want to do and when, you will also need to consider costs.

A number of HLF programmes have a two stage application process. For the first stage, you may have 'ball park' figures which you will then firm up during the second or 'development stage' of your project. It is recognised that costs can change from stage 1 to stage 2, however, it is important that any cost changes are explained clearly.

If you are applying through a single staged application form, you need to get your costs right at the outset. Remember to think about hidden costs, such as materials to deliver your activities, costs for planning permissions or costs for marketing and communications. If you are working with an architect, they will support with developing a budget for capital works.

8.0 Making the application

The final stage is making the application. Again, as you complete the form, read through the guidance to check you have all the information you need. Make sure you are applying for an amount of money supported by the grant programme and check, and double check that you have the right supporting documentation.

Much of the documentation needs to 'read-across' – so if you have an activity plan with an action plan, and also need to outline your delivery timetable in the application, make sure these things are aligned. Similarly, if you need include a detailed budget, make sure the figures align with headline budget in your application.

A good project, that is well considered, coherent, well consulted on and meets the outcomes HLF are looking achieve will be in a good position to gain funding.

9.0 Approaching different funders

This guidance is steered towards developing a project for an HLF bid, however, many of the same things apply if you are looking at a different funder, or range of funders for your project. In particular, always refresh yourself of your vision and think about your funding priorities and how they deliver your vision. Consult the aims and objectives of your funder, do they fund what you want to do – will you be of mutual benefit to one another, i.e. will they fund you and can you help deliver their objectives? Always consider the length of your project and think carefully about your budget to really ensure there are no hidden costs after your grant has arrived!