

## A SHARE guide for museums applying for National Lottery Heritage Fund Heritage Emergency Funding

(with thanks to Claire Adler, Heritage Consultant: Learning, Community, Development & Julie Cole, JMC Consultancy, for their contributions)

Applications for the NLHF Heritage Emergency Fund are now open. Below is a summary of the key information you will need to complete an application, as well as some hints and tips. You will find guidance on:

- Answering the question about meeting NLHF outcomes (page 3)
- Answering finance questions (page 6)
- Tips for improving your website to support your application (page 5)

Please be aware that NLHF are expecting a high number of applications so timescales may be reviewed.

- [Click here](#) the full funding criteria here, along with the [FAQs](#).
- [Click here](#) for the full list of application questions
- **Are you applying for more than £10K?** If so, [Click here](#) to watch the NLHF video on providing the required cashflow forecast (we have provided a summary of the main points on page 8 of this document).

### IMPORTANT:

Please let us know as soon as you are considering putting in an application to NLHF. You can drop us an email at [sharemuseumeast@norfolk.gov.uk](mailto:sharemuseumeast@norfolk.gov.uk).

### Who can apply and deadlines

Grants are available from **£3,000 - £50,000** to support immediate actions needed to stabilise operations, manage unforeseen risks and cover unavoidable costs organisations will be unable to meet for up to four months. Partnership (match-funding) is not required.

**Please be aware that organisations within Local Authorities, Universities and privately-owned museums are not eligible even if you have previously received funding from NLHF. Additionally, organisations which have significant and ongoing resilience issues pre-dating the Covid-19 emergency will be a lower priority but may be able to access support through other NLHF initiatives.**

- Applications open: **Wednesday 15 April**
- Deadline for applications: **Tuesday 30 June**
- Notification for successful applicants: **ongoing**

If your organisation is currently working on a project funded by NLHF please contact them via your Investment Manager to discuss options available to your organisation. NLHF have postponed all other current grant schemes.

**To apply, your museum must meet all the following criteria:**

- a not-for-profit organisation
- have completed a grant of more than £10,000 from NLHF in the past 10 years
- an owner, manager or representative of heritage, or be able to show you have delivered participatory heritage activity
- not already in receipt of emergency funding from another National Lottery distributor, including Arts Council England.

**Funding could cover operational costs such as:**

- running immediate risk management reviews and the actions identified as needed to safe-guard organisations
- reconfigure business plans, governance and activity needed to help safeguard the future of organisations
- cost for site security
- maintaining climatic conditions for collections
- staff costs to allow organisations to respond, design and deliver plans

**The NHLF is unable to fund:**

- staff costs that are eligible to be covered by government support, e.g. furloughing
- redundancy costs for staff that have not been hired as part of funding for NLHF projects
- costs that will incur beyond four months from the point of your application
- sustainability costs that have been exacerbated by the crisis

## Application Tips

- Before starting the application online, we suggest looking through the list of questions that you will be asked and start to gather the required information together. You can [read the questions here](#).
- Check key dates for finances - NLHF will not fund applications for costs incurred beyond 4 months of your application.
- The questions in the application are much more weighted towards finance and sustainability, and as an organisation applying you need to consider what your costs will be.
- You will need to complete the application in one sitting. Prepare answers in Word and be aware of the word limit; the website will cut off any text once reached.

## Priority Organisations

**A high demand is expected and NLHF is prioritising organisations which:**

- have limited access to other sources of support, for example from Governments, other National Lottery distributors, other emergency funding from trusts and foundations
- have already tried other options such as postponing or rescheduling projects, diverting funding to support operational costs, or value engineering projects

- are at greater financial risk from Covid-19 due to a reliance on trading or community fundraising income streams
- are at greater financial risk due to limited reserves.

**It will also prioritise where:**

- an organisation is contributing to the NLHF [Outcomes](#) around economic regeneration, inclusion and wellbeing (*see below for more detail*)
- an organisation is working within one of the NLHF's Areas of Focus - in this region, **Luton and Tendring**.
- heritage is most at risk. This includes heritage which is likely to be lost, damaged or forgotten; designated as 'at risk'; sites that are decaying or neglected; intangible heritage and cultural practices that might be lost

**You will not be able to resubmit applications, this is strictly short-term emergency funding.** NHLF are working with the Government and other funders to consider what additional support may be available where this funding may not be enough to address challenges faced by COVID-19. You will have opportunity in the application process to raise concerns about funding streams, eligibility for these and timings.

During the application process NHLF will assess if organisations are better placed to access emergency funding from other sources (e.g. being a recipient of ACE grants as part of the Accreditation scheme or are successful with a local authority business grant.).

## Assessment process

The NHLF will make decisions on applications within 2-3 weeks and may offer organisations a different amount of money than originally requested. If you are successful, you will need to provide additional documents to the NHLF. Payment, in full, will be provided upfront. It also will be a requirement to complete an evaluation report, including collecting some data.

## NLHF Outcomes

You will be asked about how your organisation contributed to the National Lottery Heritage Fund outcomes. The application will ask you to:

*"Tell us about the nature of the work your organisation does and how you are contributing to our outcomes around economic regeneration, inclusion and wellbeing. (200 word limit)."*

You have very few words for your answer to this question! Write about:

- **the work** you do (i.e. don't waste words on who you are or too much about your collections)
- how this **work** could use your collections, stories and/or buildings to bring heritage to life for the communities that you work with
- Concentrate on the activities you do **with and for your community**

- How do you **support the local agenda** and needs of the local (or wider if relevant) community as well as supporting tourism and economic activity?

The three NHLF's Outcomes they want you to talk about here are **INCLUSION**, **WELLBEING**, and **ECONOMIC REGENERATION**

### **1. INCLUSION:**

#### **A wider range of people will be involved in heritage:**

*... It might include, for example, a broader range of ages, ethnicities and social backgrounds, more disabled people, or groups who have never engaged with your heritage before.*

#### **HINT: What to think about/include in your application**

This involvement/ engagement/inclusion can include your visitors, your workforce including volunteers and trustees, work experience trainees etc.

- Have you collected any audience/visitor data via SHARE VIE, Audience Finder or other methods so you have data about the age range, ethnicities, social backgrounds etc? *If so, can you include some basic overview figures?*
- Do you have a vision of inclusion for your organisation?
- What have you done recently/plan to do to develop your audience? Do you have an Audience Development Plan?
- Have you done/plan any projects/activities for particular types of visitors e.g. early years, older people, mental health or disability related groups?
- What have you done recently/plan to do to improve access (in the widest sense) to your site, your collections (including digitally) and your website?
- Have you made efforts to diversify your staff/volunteers/trustees?
- Back up as much as possible with figures and facts rather than speculation. Do you know how many people visited and the reasons why they came?

### **6. Wellbeing:**

#### **People will have a great sense of wellbeing**

*Participants/ Visitors will report, for example, increased happiness, greater satisfaction, reduced levels of anxiety, and/or that life feels more worthwhile as a result of their involvement in your project.*

*They will feel more connected to those around them, or maybe more connected to the place they live in*

#### **HINT: What to think about/include in your application**

- Do you work on any specific projects with wellbeing aims?
- Do you support local festivals/ events that help local place-making?

### **9. Economic regeneration:**

***The local economy will be boosted***

*You'll be able to show that local businesses have benefited from your project.*

#### **HINT: What to think about/include in your application**

- Can you show that you have increased the number of tourists coming into the area or that visitors come specially to visit you?
- Do you have a shop, café, average spend figures?
- Do you use local suppliers/ businesses and add to their income?
- Do you support local festivals/ events that add to local economic activity?
- How many people do you employ? How many volunteers do you have?

#### **An example of a 200-word response:**

*“Tell us about the nature of the work your organisation does and how you are contributing to our outcomes around economic regeneration, inclusion and wellbeing. (200 word limit).”*

Example: **Teapot Museum (word count 199)**

In our 2020-25 Forward Plan we aim for the Teapot Museum to be ‘a tea break from a busy world’. Through our displays and programmes we engage diverse audiences with the importance of tea making and sharing. We know that of our 20,000 visitors in 2018-2019, 5,000 specifically engaged through our programmes – whether through our weekly partnership project with MIND or the carers and under 5s Club from the local housing estate. Last year we developed an online tour and in response to Covid-19 we are creating online resources to celebrate the mental health benefits of sharing food, the science of tea and how to make tea pots.

Our cafe is renowned for afternoon tea and is the number 1 café for Teasville on Trip Advisor and the museum has an annual income of £70,000. We are therefore central to our local economy: we employ 3 FT members of staff, 10 PT staff in high season, buy cakes from Mrs Miggins and use external local caterers for our 20 events a year that we host for weddings, wedding anniversaries and graduation parties. Our 35 volunteers are primarily over 65 years old and in our annual survey 98% felt valued.

**...Don't forget your website!**

**Assessors may check out your website in order to get a feel for your organisation. If you are able, spend time improving the appearance and content of some key pages to support your application. Here are some top tips for impressing an assessor:**

1. First and foremost, make sure on the landing page that you say the museums is currently closed...but outline what you are offering instead (e.g. online volunteering/ shop/ advice/home learning resources/online exhibitions etc) – use it for positive messaging and show that you are proactive. Check out these sites for ideas  
<https://www.birminghummuseums.org.uk/bmag> and <https://huguenotmuseum.org/>
2. Have direct links on the front page to the resources that are still available – particularly anything that can help people's mental health –such as online volunteering or online exhibitions or events.
3. Include links to social media – and ensure they are active and are currently being used.
4. Ensure all events that are on the page say if they are cancelled or postponed or going ahead at present
5. It would also be useful to see a page about staffing/ volunteering/ trustees ... 'the who we are' – these are always really interesting pages, as you get an idea of the type of organisation that you are looking at.
6. Ensure headline figures for the previous year are easy to find i.e. how many people came, how many people actively engaged, how much money was fundraised, how many members of staff, how many volunteers etc.
7. Quotes from visitors about how marvellous you are through Trip advisor etc can also help to show that you are responsive to your audiences and have an interest in what they say.

## **Answering the finance questions**

Below are some suggestions for handling the questions regarding risks and management of finances.

**19. As the details of some Covid-19 related funding schemes are not yet clear, tell us about any concerns you may have about your eligibility for them, the timing of receipt of grants and how you plan on bridging any gaps around this timing**

- Avoid surprises – regularly update the cashflow
- Move from annual to monthly payments e.g. insurance
- More frequent Gift Aid claims instead of an annual claim

**27. What do you need to do now to stop your organisation being at risk? What have you already done to reduce your outgoings? What more do you plan to do? around this timing**

- Submit monthly utility readings to ensure you're only paying for what you use
- Make receiving donations easy with an electronic donations feature on your website
- Share your museum's financial predicament with your members and supporters and ask for a donation
- Join AIM's Energy Action Group
- Establish a small society lottery: at least 20% of proceeds must be applied to the organisation

**28. How much free reserves and other funding is immediately available to support the short-term operation of the organisation? Please enter the amount**

- Free reserves are cash, current and no-notice savings accounts, and designated funds unrelated to a restricted grant. Free reserves do not include pre-booking or other pre-payments which should be held back for refunds

**29. How long is this expected to last, in months? Ignore funds that are reserved for projects that you are contractually committed to and take in to account any reduction of costs that you have already implemented.**

- Analyse cash-flow forecast from date of application.

**30. Has your organisation faced any significant sustainability concerns in 2019 or in early 2020 prior to the impact of Covid-19 arising? (100 word limit) If yes, please summarise. In this context, we mean concerns as to whether you might be at risk of closure in the next two years unless you secure additional funding or implemented a reorganisation plan. around this timing**

- **Example:** Business planning highlighted a need for staff downsizing to stay within income but needed income from 2020 season to fund redundancies

**...Don't forget we can help!**

We are providing a dedicated helpline to museums in the East of England who want to talk through governance issues, including finances. If you would like support answering any of the questions above, please see below for details:

**Business support helpline**

We have appointed Julie Cole of JMC Consultancy to provide support to museums with business planning, governance and HR issues. Julie is able to advise on:

- Paid employees/workers
- Home working
- Lone working / safeguarding
- Insurance cover

- Director/Trustee decision-making
- AGM/EGMs
- Statutory reporting
- Emergency financial planning
- Planning for worse case scenarios: winding-up/dissolution

Please [email Julie](#) to arrange a time to discuss your application.

## Creating a Cashflow Forecast

The cashflow forecast is a supporting document required for Heritage Emergency Fund grants over £10,000. [Click here](#) to watch the NLHF video on how to do this. The key points are:

- One single spreadsheet is requested. Other cashflow scenarios can be presented in separate notes (but not more spreadsheets)
- Forecasts will be accepted in good faith and museums will not be held to them
- There is no specified template but the video shows a useful format in Excel
- If a museum has a trading subsidiary it should present income cashflow as a consolidated forecast from both museum and subsidiary
- The income forecast should split ordinary expected income and anticipated emergency income
- Museums should make fair assumptions about income and include a short note why they are making those assumptions
- Investment income and regular revenue funding income should be recorded as separate items
- It would be prudent to assume that furloughing won't continue beyond the current phase
- All other actual emergency income must be recorded, e.g. Small Business Rate Relief, Retail Hospitality & Leisure Grants, insurance (if paying out)
- A note of applications for other emergency funding should be included even if not yet awarded
- Expenditure includes pre-existing liabilities becoming due in the next four months
- Payroll costs should take the Job Retention Scheme income into account
- Decision makers will look particularly at the HEF grant requested and other anticipated emergency funding to gauge the priority rating of the museum

End.