

Grant Writing Toolkit

The purpose of this toolkit is to provide advice, guidance, and resources to assist museums with the process of grant writing.

We will do our best to keep the information in this toolkit up-to-date.

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Section 1

Before writing your grant application

Before you apply for a grant, think about why you are applying.

What to consider:

- Have you the time and resources to apply for funding, then to deliver the project? Be honest, writing an application is time consuming and success rates for many are low. A simple cost/benefit analysis is one way of assessing this. For a worked example see **Appendix 1**.
- Does your project fit within your constitution's area of benefit? Does it meet your Aims and Objectives? Most funders will ask for a copy of your constitution and/or check your Charity Commission page to check the 'area of benefit'.

The project and your need should be the reason you are applying - not that funding is available, and you are fitting a project to its meet requirements.

When planning your project think about:

- Is your project addressing a clearly defined problem or need? If you are not clear, then it is harder to tell the funder about your project.
- Is your project realistic? Are your outcomes (your project's activities) achievable?
- Can you evidence the need for your project? Do you have feedback from users? Have you looked at local statistics that you can use to support your project? Is there an identified need locally that your project will help to address? Make sure you have relevant, recent information and data from a range of sources to support your project.

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Next steps:

To help you check you have answered these questions, a useful first step is to write a project plan.

When writing your project plan, you will need to consider and cover:

- 1. Where are we?** What is the current situation? Which resources and information do we already have?
- 2. Why?** Why do we want to do the project?
- 3. What?** What exactly do we want to do? What is the need? What evidence do we have?
- 4. Who?** Who is needed to support and plan the project? Who will benefit?
- 5. How?** How will we do it? How will we check its success (monitoring)? How will we decide what worked and if we could have done it better (evaluation)?
- 6. What is the timeline?** How long will it take? When do we want to start?
- 7. What is the budget?** How much will it cost? Where is any additional funding coming from?

Answering these seven questions will help you to organise your thoughts and provide you with a clear, comprehensive 'project plan'. You can use the plan to help you to research funding opportunities and to complete funding applications.

Most funders ask for a project plan either as part of the application process or as supporting information. For example, the National Lottery Heritage Fund provides a template: <https://www.heritagefund.org.uk/publications/project-plan-templates>

A summary table of the most common funds that museums/heritage organisations apply to can be found in **Appendix 7**.

A useful source for funders is funding directories, Esmée Fairbairn Foundation provides a list: <https://esmeefairbairn.org.uk/applications/other-sources-funding-help/>

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Section 2

Writing your application

Check the funder's requirements

An essential first step in writing any application is to check the funder's requirements. Read their criteria and guidance carefully - many applications fail as they do not meet the funder's aims and/or submit the correct information.

What to check:

- Does your project meet the funder's aims and purpose? If you are not sure contact the funder.
- Have you looked at what they have previously funded? It is another useful way to check that your project meets their requirements.
- What are the exclusions? Is your organisation and/or your project eligible?
- What financial information do you need to provide?
- Do you need match funding? If so, where from? How much? Does the amount you need change depending on how much you are asking for? Is it in-cash? Can it include in-kind?
- What additional information do you need to provide? Don't be tempted to add extra documents, only include what is asked for. But do gather this information early – it takes time to collate.
- What is the submission date? Applications that are submitted late will not be considered.

Do you know what the difference is between *aims* and *objectives*, and *outcomes* and *outputs*?

It is important to understand the differences and how they relate to each other. **Appendix 2** provides explanations of the differences with examples.

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Funders:

- Will want to know the overall aim (this will most likely be as part of the project summary) and how you are going to achieve it (objectives).
- Will be interested in the outcomes, not just the activities you are delivering.
- Are increasingly asking applicants to demonstrate the difference project will make – the outcomes.
- Want outcomes to be measurable. They will ask you to set targets and will want details on how you will monitor and evaluate your project.

Have you got evidence of need to support your application?

It is important to research and provide relevant evidence to support your identified need. See **Appendix 3** for suggestions of where to find information that you can use as evidence.

Including this information is essential as it will:

- Help you to define the problem or need clearly.
- Provide information that will inform your outcomes (what change will happen because of your planned activities).
- Prove to the funder that you understand the need, this in turn gives the funder confidence in you - that they are not wasting their money on you.

Using your evidence to support your application

- Make sure any evidence you use is specifically related to the project.
- How much evidence you provide should be guided by the size of your funding application.
- Include several sources of evidence both from within your organisation and from external sources. Ensure you have a mix of qualitative (e.g., quotes from previous participants, letters of support) and quantitative (facts and figures) data.

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How to present information in your application

You should aim to make the application as easy to read as possible.

Remember:

- Don't assume that the person knows you and your project. It may be obvious to you but make sure you explain clearly what you do and what the project is.
- Write in clear, easy to understand language – try not to use acronyms, jargon, or specialist terms. If you do explain them clearly.
- Use facts and figures (evidence of need) to back up and support your claims. Be specific.
- Use active sentences.
- Be positive! Don't say 'This project will aim to' instead use 'This project will'.
- Use the funder's language. This is key, it helps to demonstrate to the funder you have read and understood their guidance and the purpose of the funding.
- Avoid long, densely worded paragraphs of text. Instead use:
 - Bullet points
 - Headings
 - Highlights in bold or underline
 - Short paragraphs

When you have finished your application get someone else to read it. It is useful for someone who is not so close to the project as you to give you feedback and suggest edits.

Your local Museum Development Officer is available to read through you application and provide feedback.

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Section 3

Financial information

Types of financial information commonly asked for

Exactly what information is required and how this information is presented will depend on the funder. Check the guidance the funder provides about the grant. Not all the following information will be needed by every funder, this is an overview of the most requested financial information by funders:

i. Project budget

- Predicted transactions (income and expenditure) for the total cost of the project. Most funders will include a table/form for you to complete.
- It is usual for funders to ask you to base your predictions on quotes you have received.
- Some funders will ask an additional question about how you calculated the costs. Therefore, you will need to demonstrate how you have arrived at your expenditure cost. Consider *Fair Pay* when calculating your costs for contracted and freelance contracts ACE produces guidelines:
https://www.artscouncil.org.uk/sites/default/files/download-file/ACNLPG_Fair_pay_0.pdf
- You can benchmark against similar projects, for example, looking at sites such as the Leicester Museum Job Desk.
- Most funders will allow you to include *support-in-kind*. Depending on the funder, this may also be referred to as 'non-cash contributions'. See **Appendix 4** for examples of what this can cover, and how to cost out volunteer contributions.
- It is common for funders to require you to provide tenders for goods, works or services worth more than:
 - £10,000 (excluding VAT) at least three competitive tenders/quotes.
 - £50,000 (excluding VAT) proof of competitive tendering procedures
- Some funders give option of calculating costs as *full cost recovery*. Full cost recovery means securing funding for all the costs involved in running a

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project. This means that you can request funding for direct project costs and for a proportionate share of your organisation's overheads.

NCVO provides useful guidance on preparing a budget:

<https://beta.ncvo.org.uk/help-and-guidance/funding-income/all-about-grants/preparing-your-budget/>

The National Lottery Heritage Fund provides procurement guidelines as well as a tender template brief <https://www.heritagefund.org.uk/funding/good-practice-guidance/writing-brief-procurement-goods-or-services>

For an example of a Procurement Method Statement see **Appendix 5**.

The Big Lottery Fund provides useful tools and resources to help you calculate Full cost recovery: www.biglotteryfund.org.uk/fcr.

SEMD has put together a range of resources which includes information on commissioning and writing briefs for consultants:

<https://southeastmuseums.org/support/working-with-freelancers/>

SEMD has a useful training session: <https://southeastmuseums.org/resource-library/resources-from-training-on-full-cost-recovery-29-may-2020/>

ii. **Project cashflow**

- The planned income and expenditure of your project.
- The figures must match those included in your project budget.
- Funders such as Arts Council England provide a cashflow template that you must use see **Appendix 8** for an example.

iii. **Income/ expenditure**

- Is an account of the surplus or deficit of your organisation.
- Example of an income/ expenditure template from the Arts Council England, see **Appendix 9**.

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iv. **Cashflow forecasts**

- Is the planned income and expenditure of your organisation.

NCVO provides a simple explanation of cashflow forecasts:

<https://knowhow.ncvo.org.uk/organisation/financial-management/planning-and-budgeting/budgeting>

Your organisation can hold different types of funds, it is useful to understand what these are and how they are different from each other. **Appendix 6** explains the difference between unrestricted and restricted funds, free reserves, and designated funds.

v. **Financial statements**

- This is usually the most recent audited or accountant verified accounts. If you are a new organisation, you will not be required to include accounts, but you will need to provide proof. For example, this could be your last three bank statements or a letter from your bank confirming that you have opened an account.

vi. **Bank account**

- Proof that you have a bank account that has at least 2 signatories.

vii. **Business Plan**

- This plan will set out the financial and organisational aspects of your business. This is different from your project plan.

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The National Lottery Heritage Fund Business Plan provides a template:

<https://www.heritagefund.org.uk/funding/good-practice-guidance/business-plan-template-and-guidance#heading-8>

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The Association of Independent Museum's Successful Business Planning gives guidance on what to include and how to layout a business plan:

<https://www.aim-museums.co.uk/wp-content/uploads/2017/03/Successful-Business-Planning-2017.pdf>

It is helpful to know some basic financial terms to help you understand what the funder requires.

The National Lottery Heritage Fund Business Plan template has a glossary of financial terms: <https://www.heritagefund.org.uk/funding/good-practice-guidance/business-plan-template-and-guidance#heading-8>

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Appendix 1

Cost/benefit analysis

worked example: £1000 SEMD Collections Care Grants

Benefit: the costume collection is repacked in acid free boxes. The museum may have no budget for this type of work - and this is the only way to get it done.

Volunteers may be time-rich, but cash-short.

Costs:

- 1 hour to complete the required benchmarks document
- 2 hours to look up the costs of materials; read the guidelines and complete the application form; and upload quotes/price lists/benchmarks documents
- 30 to 60 mins to respond to grant award letter; provide bank supplier details if not on funder's system; and accept grant
- 30 mins to complete post-grant 'case study form' and send evidence of expenditure (i.e., invoices/payments)
- 1 to 2 hours to gather data on last year's operations, and complete annual survey for Museum Development (a requirement of accepting a SEMD grants)
- Opportunity costs i.e., what you could have done with the 5-6 hours if you hadn't gone for the grant.

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Appendix 2

The difference between aims, objectives, outcomes, and outputs?

Aims

What you are trying to achieve. They are statements of intent and usually written in broad terms.

Example: To encourage young people to engage with the museum as part of Museum Takeover Day

Objectives

The planned activities which will enable you to achieve your aims. Objectives should be specific with measurable outcomes and be SMART:

- **S** - specific
- **M** - measured
- **A** - achievable
- **R** - realistic
- **T** - time limited

Example: To deliver 1 workshop for young people to develop curatorial skills to support 2 young people to take part in Museum Takeover Day on the 12 November 2021

Outcomes

The changes, benefits, learning or other effects that occur because of your activities.

Outputs

The detailed activities and services and products you provide. The easiest way of describing the difference between them is to explain how an outcome is different from an output.

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Example: The *output* of a teacher is a certain number of lessons delivered in a year. The *outcome* is happier, wiser students who are more able to succeed.

It is also worth noting:

- **Aims and outcomes are linked.** Aims describe what you plan to change, and outcomes describe the change that will happen because of what you do.
- **Objectives and outputs are linked.** Objectives describe the activities you plan to run, and outputs are the actual activities you will deliver.

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Appendix 3

Potential sources to support evidence of need

Own evaluation and monitoring

This could be feedback from activities, visitor survey responses, comments books, case studies, social media engagement data

i. Local statistics

Look for data gathered by your local authority, local health authority, local tourism agency.

Tourism agencies produce a wealth of data on tourists, which is useful to research and use. If you search for your local tourism office, they often have local data and information available, for example:

- Tourism South East – Insights <https://www.tourismsoutheast.com/industry-insights>
- Tourism South East – South East England Visitor Sentiment Tracker <https://www.tourismsoutheast.com/insight-trackers>
- Visit Britain <https://www.visitbritain.org/official-statistics>

Local authorities often produce useful summaries of local population and demographics, for example:

- County level
https://www.westsussex.gov.uk/media/8996/01_about_west_sussex_2019.pdf
<https://www.surreyi.gov.uk>
- District level
<https://www.elmbridge.gov.uk/council/population-and-demographics/>

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There is also a wealth of useful reports and statistics available from <https://lginform.local.gov.uk>.

e.g., Well-being in your area https://lginform.local.gov.uk/reports/view/lga-research/lga-research-summary-report-personal-wellbeing-in-your-area?mod-area=E10000014&mod-group=AllCountiesInCountry_England&mod-type=namedComparisonGroup

Local health authorities, also have information available.

e.g., Health Profiles <https://fingertips.phe.org.uk/profile/health-profiles>

ii. **Heritage/ museum sector specific data**

There are several sector specific surveys' and reports available.

e.g., [Museum Audience Report, 2018](#), and DCMS [Taking Part](#)

iii. **Letters of support**

iv. **Local area profiles**

The [Audience Agency](#)'s local area profiles are a useful resource. Although you have to pay for them, they provide a wealth of useful information and can be tailored to your needs.

South East Museum Development have commissioned area profiles reports for the South East which they can send you for free.

<https://southeastmuseums.org/resource-library/engagement-area-profile-reports-2021-24/>

v. **Trip Advisor, Google reviews**

vi. **Census**

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Although the data is now old, the Office for National Statistics does undertake projections and therefore still remain a useful source

<https://www.ons.gov.uk/census/2011census/2011censusdata>

They have a wide range of different reports, including Spotlight Reports highlighting specific areas.

vii. **National reports, policies**

There are a wealth of national reports and policies relating specifically to the heritage/ museum sectors, and to sectors you may be looking to support.

Which other sectors you look at will depend on your project.

For example:

London Arts and Health's news section is a good source for the latest reports relating to health and well-being for heritage and cultural sectors

<https://londonartsandhealth.org.uk/news/>

The Cultural Health and Wellbeing Alliance

<https://www.culturehealthandwellbeing.org.uk> also has a good resources section and links.

It is also worth looking outside the sector, to other organisations, thinktanks etc. Such as The Kings Fund <https://www.kingsfund.org.uk/publications>.

viii. **Academic findings**

It is worth looking at academic research, papers, and findings, again this will depend on your project. But it may be relevant to include research that supports your project's need.

- <https://www.britishmuseum.org/research>
- <https://pandemicandbeyond.exeter.ac.uk/blog/research-on-museums-and-collections-in-the-pandemic/>
- <https://ahrc.ukri.org>

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Appendix 4

Support in kind/ non-cash contributions

Always check the funders guidance on what they will and will not include as it does vary.

Examples of non-cash contributions include:

- equipment
- use of a space
- volunteer time
- services (e.g., hire of space provided at a reduced rate – if a space is usually hired at £1000 per day and you are charged £800. £200 would be considered as support in kind)

Volunteer time

Funders, such as Heritage Fund, ask you to differentiate volunteer time.

In their guidance, this could include administrative work, clearing a site or working as a steward at an event, but should not include costs for the time of people who will take part in your activities (for example, people who attend a workshop or go on a guided tour)

The Heritage Fund's standard rate to calculate the value of your volunteer time is:

- professional volunteer (for example, accountancy or teaching): £50 per hour
- skilled volunteer (for example, leading a guided walk): £20 per hour
- volunteer (for example, clearing a site or acting as a steward at an event): £10 per hour

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Appendix 5

Procurement method statement

Example from The Diving Museum

The HDS Diving Museum Procurement Method Statement HDS/DM/56/V2/A



1. Background

The tender process for this capital project is not subject to the Public Contracts Regulations 2015 (PCR) as the total estimated value of the contracts fall below the threshold values. In line with best practice the Historical Diving Society will continue to apply the principles of non-discrimination, equal treatment, transparency, mutual recognition, and proportionality¹ to the tender process.

The Historical Diving Society will seek competitive tenders for any goods, works or services worth more than:

- £10,000 (excluding VAT) to provide at least three competitive tenders/quotes.
- £50,000 (excluding VAT) to provide proof of competitive tendering procedures.

We will select the option which provides value for money in relation to the project.

2. Methodology

Non-construction contracts

i) Tender document

Tender document will include the following information:

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Schedule of services

1. Introduction

- Summary of the purpose of the contract
- Outline timescale
- Key tasks/ outcomes

2. The project

2.1 Scope of the project

- Detailed overview of the project
- Information about the wider scope of the plans for the redevelopment of the Diving Museum
- Other relevant background information including works undertaken to date

2.2 Budget

- Overview of the project budget

3. General duties

- Details of the work to be undertaken including, but not excluding: requirements to attend meetings, expectations about the carrying out and completing the services.

4. Schedule of service

- Overall purpose of contract
- Key tasks to be completed for the contract
- Reporting requirements
- Criteria for role

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5. Fee offer and information required for tender submission

- 5.1 Contact and Queries
Details of who to contact about contract queries
- 5.2 Submitting the Tender
Details of what is to be submitted, how and to whom
- 5.3 Programme
Outline timetable for work
- 5.4 Checklist
List of information required to be returned with submission

6. Contract Award Criteria

- 6.1 Evaluation Criteria
 - Based on the value assessment approach to assess a Tender on both quality and price
- 6.2 Quality Assessment
 - 80% of assessment based on the quality of response (See Appendix 1 for scoring and response matrix)
- 6.3 Price Assessment
 - 20% of assessment based on financial response (See Appendix 1 for scoring and response matrix)
- 6.4 Interview / Presentation
 - Details of interview dates and presentation requirements

7. Tender response (See Appendix 2: Standard template for tender)

Respondents will be required to complete template provided, asking for the following information:

- Basic details of individual/ company
- Insurance details
- Equal opportunities

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- Health and safety
- Professional and Business standing
- Qualitative response – set of questions to set out how work would be completed
- Details of references

Construction contracts

The appointed architect will be Contracts Administer for the construction.

i) Expression of Interest

The Expression of Interest document would outline the scope of the work, its approximate expected value and geographic location. A return address for Expressions of Interest would be supplied, with a deadline for submissions to be made. We will follow the Pre-Qualification Questionnaire format recommended by Historic England.

We would undertake a review of the responses, and these would be scored against the methodology. We would prepare a matrix of the scored responses to allow a tender list of 4 companies most suited to completing the work. The remaining unsuccessful respondents would be informed.

ii) Tender

The tender will be based on the *Tendering Practice Note 2017 (JCT)*.

3. Advertising of tenders

Non-construction contracts

Tenders will be advertised through relevant cultural and heritage jobsites, for instance, Leicester Museum Job Desk, Arts Council England, and websites advertising positions as part of their services, for example, the South East Museum Development. Where relevant other avenues will also be used, such as local authority, partners, and community support organisations to ensure contracts are widely distributed.

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Construction contracts

Expressions of Interest invited by advertising opportunity on the BiP solutions website

3.1 Conservation-accredited professional

No.2 Battery is a Grade II* at risk listed building; the appointment of conservation accredited professional will follow Historic England guidance.

4. Assessment of tenders

Tenders will be assessed by the evaluation team, consisting of the Museum Director, Chair of Trustees and 1 other member of the Trustees depending on the nature of the contract (for construction contracts this would include the CDM). The final appointment will be agreed by the Board of Trustees.

Non-construction contracts

Contract award criteria is clearly laid out in the tender document. Assessment consists of quality and price assessment. See Appendix 1 for scoring and response matrix. Allowing for appointments to be assessed and selected against value for money.

Construction contracts

The project would be tendered based on a specification, schedule of works and construction drawings for the work, completed under RIBA Stage 4 (Technical Design)

The tenderers would be expected to visit the site and any queries arising during the tender period (4 weeks) would trigger a response to all tenderers.

We would require a fully priced Schedule of Work to be returned with the Tender Offer. This would allow us to examine the tender submissions for errors to assess their responses, and to ultimately recommend a contractor for the work, within the context of a Tender Report.

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In relation to errors, Option 1 'Stand by or Withdraw' would apply.

The tender report would examine the submissions for arithmetical errors, and potential omissions or misinterpretation of the documents.

We would expect to assess 'risk items' where there is the potential for the costs to increase, in the event of additional repairs being necessary. The assessment would include a review of rates provided and the timing of the work.

A commentary covering the costs would be provided to the client, and shared with the funder, together with a recommendation for appointment.

5. Appointment of suppliers and contractors

Appointments will be made based on value for money and quality of the tender.

Non-construction contracts

Details of the interview information including presentation (if required) are included in the tender document. Interviews are held at the discretion of the evaluation team.

Construction contracts

Once the costs are accepted, we would expect to draft a building contract (JCT) form for signature by both parties.

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Quality and financial assessment criteria and matrix

Quality will account for 80% of the tender evaluation. After rejecting bids that, in the opinion of the Board, that are unrealistically low (in terms of Quality), the highest Quality score will be given 100% for Quality. Other Quality scores will then be expressed as a proportion of the highest score. This gives the adjusted Quality score. The 80% weighting for Quality is then applied to each adjusted Quality score to give the Weighted Quality Scores. Tenderers may be invited to attend an interview should the evaluation team require clarifications from the Tender submitted.

The scoring regime to those scored questions is on a 0 to 10 scale where:

- 0 = Unacceptable (requirement cannot be met in any form).
- 1 = Poor (very limited aspects of the requirement can be met).
- 3 = Weak (few aspects of the requirement can be met).
- 5 = Average (requirement can be met to an acceptable level).
- 7 = Good (requirement fully met to a complete level).
- 10 = Excellent (requirement fully met, including potential for solution to provide enhancement of outlined requirement).

The Board will examine compliance to the tender requirements and adherence to instructions. Non-compliant tenders may be disqualified.

Should the scoring regime to this Tender be unclear, the onus is on responding organisations to seek clarifications by e-mail as detailed in Part 6.

The below table outlines how questions contained in the Tender and its Sections shall be treated.

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Question Number	Question	Section Weighting	Question Weighting	Score	Max Score
QUALITATIVE RESPONSE					
1	xxx [add question as agreed by evaluation team] Maximum 500 words.	80%	30%	0-10	300
2	xxx [add question as agreed by evaluation team] Maximum 500 words.		40%	0-10	400
3	References from similar work (maximum 3 references)		20%	0-10	200
4	Availability for the duration of the contract and to attend at least two of the large public events. Note that these may be at weekends or on Bank Holidays. Maximum 300 words.		10%	0-10	100
SUB TOTAL:					
FINANCIAL RESPONSE					
1	Total Fixed Cost for delivering the Project Including Material/Printing Costs	20%			
SUB TOTAL:					

Tenderers' responses shall be marked in accordance with the following scales for each of the evaluation criteria as relevant:

- Where a response to any question is given a score of nil, (0), the Tender may be discounted in its entirety and not be considered further in the evaluation.
- Information relating to Quality shall be provided by the Tenderer as part of the tender submission. Tenders submitted without all the information required for the Evaluation Criteria will be considered incomplete and may therefore be rejected.
- Tenderers shall be aware that if they are awarded the Contract they will be required to comply with the Tendered submission.

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Standard template for tender

Basic Details (For information purposes only)

(To be returned with the Tender submission)

1	Name of the organisation in whose name the tender would be submitted:									
2	Contact name for enquiries about this submission:									
3	Contact position (Job Title)									
4	Address: Post Code:									
5	Tel number:									
6	Fax number:									
7	E-mail address:									
8	Company Registration number (if this applies)									
9	Charities or Housing Association or other Registration number (if this applies). Please specify registering body:									
10	Date of Registration:									
11	VAT registration number:									
12	Is your organisation: (Please tick one)	<table border="1"> <tr> <td>i) a public limited company</td> <td></td> </tr> <tr> <td>ii) a limited company</td> <td></td> </tr> <tr> <td>iii) a Contracting Authority</td> <td></td> </tr> <tr> <td>iv) a sole trader</td> <td></td> </tr> </table>	i) a public limited company		ii) a limited company		iii) a Contracting Authority		iv) a sole trader	
i) a public limited company										
ii) a limited company										
iii) a Contracting Authority										
iv) a sole trader										
13	Name of (ultimate) parent company (if this applies)									
14	Companies House Registration number (if this applies):									
15	What is the name and branch of your bankers (who could provide a reference)?									

Insurance

Please provide details of your current insurance cover		Value		
1	Employer's Liability (£500,000):	£		
2	Public Liability (£500,000):	£		
3	Professional Indemnity (£500,000)	£		
4	Other (please provide details):	£		
		<table border="1"> <tr> <td>Yes</td> <td>No</td> </tr> </table>	Yes	No
Yes	No			

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	It would be a condition of contract award to have in place the minimum insurance cover detailed above. If your current insurance cover is below the Museum's minimum required level, please confirm that your organisation would increase its cover should your tender be successful.		
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Equal Opportunities

1	Does your organisation have a written equal opportunities policy, to avoid discrimination?	Yes / No
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Health and Safety

1	Does your organisation have a health and safety at work system which includes a policy, nominated manager and management system?	Yes / No
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Professional and Business Standing

Does any of the following apply to your organisation, or to (any of) the director(s) / partners / proprietor (s)?		
1	Is in a state of bankruptcy, insolvency, compulsory winding up, receivership or subject to relevant proceedings:	Yes / No
2	Has been convicted of a criminal offence related to business or professional conduct.	Yes / No
3	Has committed an act of grave misconduct in the course of business	Yes / No
4	Has not fulfilled obligations related to payment of social security contributions	Yes / No
5	Has not fulfilled obligations related to payment of taxes	Yes / No
6	Is guilty of serious misrepresentation in supplying information	Yes / No
7	Is not in possession of relevant licences or membership of an appropriate organisation where required by law	Yes / No
8	If the answer to any of these is "Yes" please give brief details, including what has been done to put things right.	

Qualitative Response

For each of the qualitative response questions please complete a response proposing how you would carry out the work to deliver the Services.

1	
	<i>Please enter response here. Maximum 500 words.</i>
2	
	<i>Please enter your response here Maximum 500 words.</i>

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3	References from similar work (see below table)
4	Availability for the duration of the contract and to attend at least two of the large public events. Note that these may be at weekends or on Bank Holidays.
	<i>Please enter response here. (Maximum 300 words)</i>

Details of References

(To be returned with the Tender submission)

Referee 1	
Company Name	
Address	
Telephone	
Contact Name	
Designation	
Length of relationship	
Indication of nature of contract	
Indication of value of contract	

Referee 2	
Company Name	
Address	
Telephone	
Contact Name	
Designation	
Length of relationship	
Indication of nature of contract	
Indication of value of contract	

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Appendix 6

Different types of funds your organisation can hold

The funds your organisation holds can fall into different categories:

- **Restricted funds** are funds set aside and used by a charitable organisation for a particular purpose because of giving by an external party. They are restricted to that specified purpose and cannot be used for other expenses.
- **Unrestricted funds** are funds that the organisation may use for any purpose so long as it meets the aims and objectives of the organisation as outlined in their governing document. Organisations may use unrestricted funds towards operating costs for the organisation or costs that may be more difficult to fund through fundraising or donations. Designated funds and general funds are both unrestricted funds.
- **Designated funds** (or designated reserves) are unrestricted funds that the trustees of the organisation have set aside for a particular purpose; these funds can be undesignated or re-designated where deemed appropriate through formal approval by the board.
- **General funds** are unrestricted funds that have not been designated for a particular purpose and can be spent as deemed fit by the board.
- **Endowment funds** are funds which the board are legally required to invest and/or to hold and use for the charity's purposes, and sometimes more specific purposes. Endowments may be expendable or permanent as set out in relevant documents and policies.
- **Free reserves** are the part of a charity's unrestricted funds that are freely available to spend on any of the charity's purposes. Free reserves therefore exclude:
 - tangible fixed assets used to carry out the charity's activities, such as land and buildings
 - programme-related investments held solely to further the charity's purposes
 - designated funds
 - commitments that have not been provided for as a liability in the accounts

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Appendix 7

Most common funds museums apply to

	Arts Council England National Lottery Project Grants (ACE)	National Lottery Heritage Fund (NLHF)	South East Museum Development (SEMD)	Museums Association Esmée Fairbairn Collections Fund	Association of Independent Museums Hallmarks Grant (AIM)	Association of Independent Museums Pilgrim Trust Collections and Conservations Grants	Association of Independent Museums New Stories New Audiences (AIM)
Grant range	Usually £1,000 - £100,000	£3,000 to over £5 million	Up to £3000	Between £20,000 - £90,000	Up to £10,000	Up to £10,000	Up to £15,000
Purpose	Supports museums (including non-accredited). To engage people in England with Creativity and culture	Supports not-for-profit and private owners (will weigh up public benefit) of heritage To support projects that connect people and communities to heritage in the UK	Range of grants offered responding to identified need and priorities in the South East Region. Accredited Museums (or working towards). Not open to national museums or NPOs.	Applications based on Accredited Museums (or working towards). Museums must be a member of Museums Association. With a focus on 'new, ambitious and creative work' that bring collections closer to people	Members of the Association of Independent Museums. Accredited Museums (or working towards). No NPOs. Grants available to help members develop and grow their organisations and underpin key areas of activity.	Members of the Association of Independent Museums. Accredited Museums (or working towards). Must have less than 50,000 visitors or turnover of less than £300,000 pa Grants available to help members develop and grow their organisations and underpin key areas of activity.	Members of the Association of Independent Museums. Accredited Museums (or working towards). Must have less than 20,000 visitors. Can be not-for-profit organisations or private owners of heritage. Grants available to help members develop and grow their organisations and underpin key areas of activity.

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Duration	Projects are time-specific – three years max.	From 1 to 5 years	Up to 1 year	Up to 2 years	Completed within 12 months of formal offer letter.	None specified in guidance.	Up to 1 year
Funding agreement	Payments are conditional on receipt and approval of any additional info (Payment conditions)	Payments are conditional on receipt and approval of any additional info (Payment conditions)	Offer letter detailing any conditions. 90% paid on receipt of receipt of financial supplier form.	Funds drawn down annually at start of project. Completed Grant Acceptance form details conditions.	Applicants receive 80% of grant up front with the balance paid on completion of the project.	50% on award and 50% on completion	Grant offer letter. Applicants receive 80% of grant up front with the balance paid on completion of the project.
Monitoring	Application data captured at application stage	Data specified in grant conditions. Evaluation report required	Required to provide details of how project will be evaluated.	No information in guidance	Outcomes identified in application, feedback required on how met outcomes, project went, achievements and lessons learnt.	May need to provide information to the scheme external evaluator.	Required to take part in project evaluation.
Reporting	10% of grant withheld until final report submitted	10% of grant withheld until final report and evaluation report submitted	Final reported required and claim remaining 10% of grant.	After year 1, progress report supported by approved annual accounts, and a budget for coming year.	Mid-term monitoring report form 6 months after the start project. A report on completion and a case study.	A report with photographs within 1 month of completion of the project.	Mid-term and end of project report.

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Appendix 8

Cashflow Forecast template - example from Arts Council England's Capital Fund (2021)

	Total Cost	2022										2023				2024				2025	TOTAL
		Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Quarter forecast	Quarter forecast	Quarter forecast	Quarter forecast	Quarter forecast	Quarter forecast	Quarter forecast	Quarter forecast		
		Apr 22	May 22	June 22	July 22	Aug 22	Sept 22	Oct 22	Nov 22	Dec 22	Ja-Ma23	Ap-Ju23	Jl-Se 23	Oc-De23	Ja-M 24	Ap-Ju24	Jl-Se 24	Oc-D 24	Ja-M 25		
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	
Expenditure (payments)																					
Purchase of land or buildings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Construction	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Furniture, fittings and equipment	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Specialist equipment	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Fees and charges	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
OClient costs	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Public realm works	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Contingency	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Irrecoverable VAT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Personal access costs	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total expenditure	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Income (receipts)																					
Arts Council England	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Local Authority funding	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Other public	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Trust and Foundations	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Other Lottery distributors	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Individuals or companies	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Public appeals and fundraising events	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Contribution from own organisation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Support in kind	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Receipts	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Cash b/f	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Payment	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Receipts	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Cash c/f	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

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NOTES ABOUT CAPITAL FUND CASHFLOW (ACE)

Your cashflow should demonstrate both project income and outgoings, and the expected grant payments from the funder. You should take the following information into consideration when preparing your cashflow forecast:

- Your cashflow should align with the figures provided on the income and expenditure screens on Grantium (ACE's grant portal).
- We are unable to pay for costs invoiced before the date of our Funding Agreement.
- At least 10% (grants £250,001 to £750,000) or 5% (grants £100,000 to £250,000) of the total cost of activity must come from sources other than the Arts Council. This excludes funding that was received prior to the date of the Funding Agreement.
- We will pay the grant in instalments against actual expenditure aligned to the expenditure listing submitted with each payment request.
- The final payment request must be submitted no later than 30 April 2025 for expenditure up to 31 March 2025.
- Your cashflow should demonstrate that the capital expenditure will take place by 31 March 2025.
- We define the project start date as the point at which your organisation will make a commitment, financial or otherwise, to undertake the whole project.

You may lose some or part of the grant if your project has not started by 30 September 2022, or if the final grant instalment has not been claimed by 30 April 2025.

Grant Writing Toolkit for Museums

Appendix 9

Income/ expenditure template

BUDGET	£
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	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	BUDGET
	Apr 22	May 22	June 22	July 22	Aug 22	Sept 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	TOTAL
	£	£	£	£	£	£	£	£	£	£	£	£	£
Income (receipts)													
DCMS Culture Recovery Funds	0	0	0	0	0	0	0	0	0	0	0	0	0
Coronavirus Job Retention Scheme	0	0	0	0	0	0	0	0	0	0	0	0	0
Restart Grant	0	0	0	0	0	0	0	0	0	0	0	0	0
Recovery Loan	0	0	0	0	0	0	0	0	0	0	0	0	0
Additional Restrictions Grant	0	0	0	0	0	0	0	0	0	0	0	0	0
Covid Statutory Sickness Rebate	0	0	0	0	0	0	0	0	0	0	0	0	0
Covid Business Interruption Loan	0	0	0	0	0	0	0	0	0	0	0	0	0
Covid Bounce Back Loan	0	0	0	0	0	0	0	0	0	0	0	0	0
Retail, Hospitality, Leisure Grant	0	0	0	0	0	0	0	0	0	0	0	0	0
Small Business Grant	0	0	0	0	0	0	0	0	0	0	0	0	0
Kickstart Scheme	0	0	0	0	0	0	0	0	0	0	0	0	0
Other gov't Covid relief (please name)	0	0	0	0	0	0	0	0	0	0	0	0	0
Insurance pay out(s)	0	0	0	0	0	0	0	0	0	0	0	0	0
Arts Council NPO	0	0	0	0	0	0	0	0	0	0	0	0	0
Arts Council – other	0	0	0	0	0	0	0	0	0	0	0	0	0
National Lottery Heritage Fund	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Lottery Grants	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Authority income	0	0	0	0	0	0	0	0	0	0	0	0	0
Other public subsidy	0	0	0	0	0	0	0	0	0	0	0	0	0
Earned income (generated income)	0	0	0	0	0	0	0	0	0	0	0	0	0
Contributed income (sponsorship & donations)	0	0	0	0	0	0	0	0	0	0	0	0	0
Investment income	0	0	0	0	0	0	0	0	0	0	0	0	0
Other income	0	0	0	0	0	0	0	0	0	0	0	0	0
Total income (receipts)	0	0	0	0	0	0	0	0	0	0	0	0	0

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	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	Month forecast	BUDGET
	Apr 22	May 22	June 22	July 22	Aug 22	Sept 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	TOTAL
	£	£	£	£	£	£	£	£	£	£	£	£	£
Expenditure (payments)													
Salaries	0	0	0	0	0	0	0	0	0	0	0	0	0
National Insurance	0	0	0	0	0	0	0	0	0	0	0	0	0
Pension costs	0	0	0	0	0	0	0	0	0	0	0	0	0
Temporary staff	0	0	0	0	0	0	0	0	0	0	0	0	0
Redundancy costs	0	0	0	0	0	0	0	0	0	0	0	0	0
Artistic/cultural spend	0	0	0	0	0	0	0	0	0	0	0	0	0
Artistic/practitioner fees	0	0	0	0	0	0	0	0	0	0	0	0	0
Rent	0	0	0	0	0	0	0	0	0	0	0	0	0
Rates	0	0	0	0	0	0	0	0	0	0	0	0	0
Heat/Light/Water	0	0	0	0	0	0	0	0	0	0	0	0	0
Insurance	0	0	0	0	0	0	0	0	0	0	0	0	0
Telephone & Internet	0	0	0	0	0	0	0	0	0	0	0	0	0
Cleaning/deep clean	0	0	0	0	0	0	0	0	0	0	0	0	0
Print/Post/Stationery	0	0	0	0	0	0	0	0	0	0	0	0	0
Advertising & Promotion	0	0	0	0	0	0	0	0	0	0	0	0	0
Consultants' fees & subscriptions	0	0	0	0	0	0	0	0	0	0	0	0	0
Legal & Professional	0	0	0	0	0	0	0	0	0	0	0	0	0
Audit & Accountancy	0	0	0	0	0	0	0	0	0	0	0	0	0
Bank charges	0	0	0	0	0	0	0	0	0	0	0	0	0
IT equipment & asset purchase	0	0	0	0	0	0	0	0	0	0	0	0	0
PPE & social distancing equipment	0	0	0	0	0	0	0	0	0	0	0	0	0
Reflating reserves	0	0	0	0	0	0	0	0	0	0	0	0	0
Other expenditure	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Expenditure	0	0	0	0	0	0	0	0	0	0	0	0	0
Surplus/deficit (Income –Expenditure)	0	0	0	0	0	0	0	0	0	0	0	0	0

Breakdown by fund													
Restricted funds	0	0	0	0	0	0	0	0	0	0	0	0	0
Unrestricted designated funds	0	0	0	0	0	0	0	0	0	0	0	0	0
Unrestricted general funds	0	0	0	0	0	0	0	0	0	0	0	0	0
Free reserves	0	0	0	0	0	0	0	0	0	0	0	0	0

Instructions													
Including any CRF Continuity Support Funding in your figures													
Do not edit cells with the following colour													
Where you have other lines of income or expenditure not listed here, please insert a row and name these sources/expenses.													