



Historic Environment Recovery Fund Application Questions

All applications to the Historic Environment Recovery Fund must be made via the online form. This document contains all of the questions from the online form and is intended to help you prepare your answers in advance. Please remember to read the programme guidance on the HERF website in full before starting your application.

Section 1: Applicant Details

1. If you have spoken to anyone at HES about your application and have an enquiry reference number (e.g. HERF01), please provide this number below.
2. What is the name of the organisation that is applying for funding?
3. Applicant organisation address
4. Primary contact name
We will contact this person if we have any questions about your application and will notify them when the application is submitted. Please ensure that contact details for your primary contact are correct and that this person is available to be contacted during the day to ensure that we can progress assessment of your application.
5. Primary contact telephone
6. Primary contact email address
7. Signature authority full name(s)
The signature authority is the person in the organisation who has authority to plan for and prioritise applications. Once your application has been submitted, the signature authority will need to complete and sign a declaration form. The application will not be considered complete until this form has been received.
8. Signature authority job title
9. Signature authority email address
10. Signature authority telephone
11. Which of the following best describes your organisation?
 - Company Limited by Guarantee
 - Company Limited by Shares
 - Scottish Charitable Incorporated Organisation (SCIO)
 - Community Interest Company (CIC)
 - Other (please specify)
12. If you are a registered charity or company, please provide your number.
13. If you are a sole trader, please provide your UTR (Unique Taxpayer Reference) number.

14. Please describe the overall objectives and activities of your organisation.
15. What is the annual turnover of your organisation?
16. How much of your annual turnover comes from activity within the historic environment sector?

Section 2: Building or Site Details

17. If you are applying under Stream 1: Re-opening Historic Buildings and Sites, please provide the address of the property or site your funding request relates to.
18. Is the property or site designated as a Listed Building or Scheduled Monument?
 - Listed Building
 - Scheduled Monument
 - Not sure
19. Who owns the property? Please provide the name of the individual or organisation which owns the property your funding request relates to.
20. Please provide the full name(s) of anyone else with a legal interest in the property.
21. If your organisation does not own the property and you are requesting funding for physical works, do you hold a full repairing lease with at least 21 years to run? Or, in the case of a Scheduled Monument or place of worship, have you got the owner's permission to carry out the proposed works?
22. Please outline briefly how your building or site is used or accessed by the public.
23. Before March 2020, how many days per calendar year was your building or site open to the public (either to visitors or members of the public making use of your building for a more specific purpose)?

Section 3: Organisational impact

24. Please tell us how your organisation makes a significant contribution to delivering outcomes for Scotland's historic environment – ensuring that it is understood, valued, cared for and enjoyed – and maximises the wider benefits it can deliver for society, the economy and the environment.
25. If there is anything else you would like to tell us about the role of your organisation in your local area, please tell us about this below.

Section 4: Impact of COVID-19 on your organisation

26. Please tell us how your organisation's financial position has been affected by COVID-19, including:
 - how your income has been affected. It will help if you explain where your income normally comes from (e.g. admissions, events, other trading activity, donations, other fundraising activity, grants etc.), roughly what percentage comes from each source and how these streams have been affected compared to the previous year. Please tell us about income that has continued as well as income that has been lost.
 - how your reserves have been affected
 - what implications the above will have for your organisation

27. What other emergency funds have you explored and what success have you had in securing financial support?
28. What actions has your organisation already taken to increase its financial resilience and give yourselves the best chance of survival? Please tell us about any changes you have already made to save money, reduce costs, share costs or open up new income streams.
29. What level of unrestricted reserves does your organisation have available to spend? Some of your cash reserves may be designated – funds that are unrestricted but earmarked at your Board’s discretion for a certain purpose. If that is the case, please include these here but tell us what they are designated for.
30. If you have restricted reserves, please tell us what these total and why they are restricted.
31. What are your normal average monthly operating costs?
32. Without support, how long do you estimate that your organisation can continue as a viable entity? Please give your answer in months from the date of your application. If you believe that you have sufficient funds to keep operating beyond 31 March 2021, please state that, but please make sure that you have explained what financial difficulties you do anticipate as a result of COVID-19 above.

Section 5: Your proposals

33. Which funding streams are you applying to? If you are not applying for funding under Stream 1, please proceed to question 39. If you are applying under Stream 1, please answer the appropriate question(s) in the following section.

Stream 1: Re-opening Historic Buildings and Sites

34. If you are seeking funding to cover costs for equipment, adaptations or training, tell us about these costs and how they will enable you to re-open (or open more fully) in line with COVID-19 guidance. If you are undertaking adaptations, please describe the proposed changes and provide sufficient information (including plans if necessary) for us to understand the likely impact on significant spaces and features.
35. If you are seeking funding to cover costs relating to urgent repairs or maintenance, outline your proposals below and tell us the following:
 - why you have not been able to undertake this work in line with your normal maintenance plan, and
 - why this work is necessary to enable you to re-open to the public (or open more fully).
36. If you are seeking funding for other essential works and checks, please detail these costs and explain how they will enable you to re-open (or open more fully)?
37. If you are seeking funding to undertake temporary mothballing measures because it is not possible to re-open at the moment, outline your proposals below and tell us:
 - why these measures are required, and
 - when you think you will be able to re-open in the future.
38. If you are seeking funding to deliver activities to re-engage communities and volunteers as you re-open your site, outline your plans below.

Stream 2: Sector Resilience and Recovery

If you are not applying for funding under Stream 2, please proceed to question 42. If you are applying under Stream 2, please answer the appropriate question(s) in this section.

39. If you are seeking funding to cover essential operating costs until 31 March 2021, please outline these costs and tell us how you plan to cover these costs beyond 31 March 2021.
40. If you are seeking funding to cover business planning activities, describe what you plan to do before 31 March 2021 and how this will help your organisation to become more resilient and sustainable.
41. If you are seeking funding to protect existing historic environment skills training opportunities (e.g. through provision of space/equipment to enable continued delivery in line with COVID-19 guidance or developing new, COVID-19 proof ways of delivering existing programmes), please outline your plans and how they will help to achieve these aims.

Section 6: Delivery plan

42. Any applicant seeking funds for activity additional to normal operations should outline their delivery plan by listing the following below:
 - the key activities needed to deliver the project by 31 March 2021
 - the start and end date of each activity
 - the job title of the person responsible for each activity
43. If your project requires consents, permissions or licences, please outline your estimated timescale for receiving these to ensure completion by 31 March 2021. Include a summary of any views or advice received from consenting authorities.
44. What is your estimated completion date?

Section 7: Expenditure

45. Can your organisation reclaim VAT?
If you can reclaim VAT, please only list non-reclaimable VAT in your grant expenditure template.
46. Amount of grant you are requesting from HES
Please list your expenditure by completing the grant expenditure template that is available on the Historic Environment Recovery Fund website (under 'How to Apply') and follow the guidance under Section 8: Supporting Documents.

Section 8: Supporting documents

After you have submitted your application form, please send your supporting documents by email to grants@hes.scot. Please note that your application will not be accepted without the required supporting documentation, which must be received by the application closing date.

All applicants must submit the following:

- Your organisation's most recent audited accounts (if your last set of signed accounts is more than 15 months old – based on the Balance Sheet date – please also submit a draft set of your latest accounts)
- A completed Grant Expenditure Template (available under 'How to Apply' on HERF website)

- A completed Cashflow Template (available under 'How to Apply' on HERF website)
- A completed and signed HERF Declaration Form (available under 'How to Apply' on HERF website)

If you are applying for urgent repairs or maintenance under Stream 1: Re-opening Historic Buildings and Sites, please also submit a completed Condition and Works Template (available under 'How to Apply' on HERG website).