**Heritage Compass: Online Application Preparation**

Thank you for your organisation's interest in applying for the Heritage Fund Business Support Programme.

This document has been created for the purposes of preparing the application only. Please use it to practice only then proceed to the Survey Monkey to submit your application.

Only full applications completed online will be considered.

Please follow this link: <https://www.surveymonkey.co.uk/r/heritagecompass>

The application deadline is midday 16th December 2021.

For further information about the Programme or the work of *Cause4* please contact us at: [heritage.compass@cause4.co.uk](mailto:heritage.compass@cause4.co.uk)

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| **Organisation Information** | |
| 1. Organisation Name\* |  |
| 2. Company Number\* |  |
| 3. Registered Charity Number (if applicable) |  |
| 4. Local authority |  |
| 5. Organisation Address\*  Name  Address  Address 2  City/Town  County  Post Code  Email Address  Phone Number |  |
| 6. Geographic Area\* | England: North  England: Midlands and East  England: South and London  Not sure |
| 7. Legal Status of Organisation\* | Local authority  Other public sector organisation  Registered Charity  Registered Company or Community Interest Company (CIC)  Faith based or church organisation  Community or Voluntary group  Other |
| 8. Type of Heritage\*  See type of heritage organisation as defined by the Heritage Fund. | Collections  Community Heritage  Landscapes and Nature  Historic Buildings and Monuments  Industrial, Maritime and Transport  Cultures and Memories  Other |
| 9. What is the approximate number of paid employees (full-time equivalent) at your organisation?\* | 0  1-5  6-10  11-20  21-50  51-100  101-250  251-500  501+  Don’t know |
| 10. How many board members or Trustees does your organisation have? |  |
| 11. How many years has your organisation been operating?\* | Under 1 year  1-2 years  2-5 years  5-10 years  10-25 years  Over 25 years |
| 12. Do you consider your organisation’s mission and objectives to be:  (please select the options that apply) | Black or minority ethnic-led  Disability-led  LGBT+ led  Female-led  Young People-led |

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| **Financial Information** | |
| 13. What was your organisation’s income in the last financial year?\* | Less that £10,000  £10,000-£50,000  £50,000-£100,000  £100,000-£500,000  £500,00-£1m  £1m-£2m  £2m and above |
| 14. Does your organisation own a heritage asset, such as a building, collections or land? | If yes, please provide more detail: |
| 15. What level of unrestricted funds is there in your organisation’s reserves?\* |  |
| 16. How many months of reserves do you currently hold?\* |  |
| 17. Do you have a financial reserves policy?\* | Yes  No |
| 18. Current Financial Situation  Please articulate the current financial situation of your organisation and whether you are in a period of concern due to COVID-19. |  |

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| **Applicant Information** | |
| 19. Lead Applicant Name\*  *Person taking part in the programme* |  |
| 20. Lead Applicant Role\* |  |
| 21. Lead Applicant Email\* |  |
| 22. Lead Applicant Phone Number\* |  |
| 23. Second Applicant Name |  |
| 24. Second Applicant Role |  |
| 25. Second Applicant Email |  |
| 26. Second Applicant Phone Number |  |
| 27. Organisation Confirmation of Support  Tick to confirm the organisation has agreed to this individual participating in the Programme on its behalf. |  |
| 28. Overview of organisation vision, mission and objectives.\*  (150 words maximum) |  |
| 29. What are the most important outcomes for you through participating in Heritage Compass?\*  (please tick up to three) | * A developed or re-invigorated Business Plan * More effective governance and financial planning * A process to manage internal culture change * A developed or re-invigorated income generation strategy * A developed or re-invigorated audience development plan * An understanding of how to use benchmarking to inform decisions * An improved network and increased confidence |
| 30. Summary of Application\*  Please provide a summary of why you are applying to the Programme, including what you hope to achieve at the end of the two years and how it will benefit your organisation’s overall mission.  (500 words maximum) |  |
| 31. Case for Support\*  Please outline why being a part of this Programme is important to your organisation and the need for engaging with it. Please tell us about the consequences of you not engaging with this Programme.  (500 words maximum) |  |
| 32. Personal Statement\*  Please provide a summary of your experience and how your participation in the Programme will benefit other members of the cohort.  (500 words maximum) |  |

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| **Request for Funding** | |
| 33. Would you need a bursary to take part in Heritage Compass?\* | Yes  No |
| 34. Amount requested (£500 - £2000) |  |
| 35. Summary of Request  We are able to offering a limited number of grants. If you would like to request this funding as part of your application, please tell us how much funding you require and what the money will go towards. Some examples might include:   * Covering costs of staff absences whilst on the Programme * Providing interim cover for staff whilst participating in the Programme * To take pressure of internal income targets throughout the Programme   Please think carefully about what you apply for and your organisation’s need. Applications will be considered on a rolling basis, so it is a good idea to apply as soon as possible.  (500 words maximum) |  |
| 36. GDPR & Data Protection\*  Please note this information is gathered as part of our National Lottery Heritage Fund supported Programme and will not be used for anything other than reporting back to the funder and processing your application. | I consent |
| 37. Would you like to hear more about our work with the Heritage Sector through email?\* | Yes  No |
| 38. Would you like to be added to the Arts Fundraising & Philanthropy mailing list?\* | Yes  No |
| 39. Would you like to be added to our partner’s mailing lists? Check those you wish to hear from. | Creative United  Arts Marketing Association |

Please note, we will share your data with organisations as part of our delivery of the programme including [DHA Communications](https://www.dhacommunications.co.uk/)as Evaluators, and [MyCake](https://mycake.org/) to inform their building of the Heritage [Fundraising Dashboard](https://artsfundraising.org.uk/benchmarking).

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