Clarification responses for the evaluation of the Heritage Emergency Fund

**Is there an outcomes framework/logical framework or similar for the Emergency Fund which can be shared during the proposal phase?**

We have said we will fund:

* an organisation is contributing to our [outcomes](https://www.heritagefund.org.uk/funding/outcomes) around economic regeneration, inclusion and wellbeing, as defined in our [Strategic Funding Framework](https://www.heritagefund.org.uk/about/strategic-funding-framework-2019-2024).
* an organisation is working within one or more of the 13 Areas of Focus we identified in our [Strategic Funding Framework](https://www.heritagefund.org.uk/about/strategic-funding-framework-2019-2024).
* heritage is most at risk\*

\*Heritage at Risk is defined as:

* heritage that is likely to be lost, damaged or forgotten
* heritage that is designated as ‘at risk’
* physical heritage sites that are decaying or neglected
* heritage at risk due to financial difficulty
* intangible heritage and cultural practices that might be lost
* important habitats and species in decline

In assessing applications, we will also consider the material difference our support is likely to make in the context of the organisation, its size and relative to the scale of the risk faced by you and the heritage you look after. We are working with Governments and other funders to consider what other support might be available where our funding will not be enough to address the challenges faced.

Due to high demand for this type of funding, organisations will be a lower priority for support if they:

* are better placed to access emergency funding from other sources
* have significant and ongoing resilience issues pre-dating the COVID-19 emergency. If this applies to your organisation, we recommend you discuss these issues with your local team, as we may be able to provide advice and support through our longer-term strategic initiatives.
* completed their last National Lottery Heritage Fund project over 10 years ago.

**Will The National Lottery Heritage Fund be able to provide a list of organisations who could have applied for funding from the Emergency Fund but did not, or would the successful contractor need to research this?**

This will be provided to the successful bidder.

**With the Emergency Fund closing on 30 June, some grants will not be fully spent until the end of October and so would a phased approach to the survey and interview methodology be acceptable, in order to be able to include those organisations making later applications?**

Yes, this approach is acceptable.

**Would it be acceptable to include biographies of the team who would work on the project as an appendix to the proposal, or do they need to be part of the 15 page maximum?**

Yes, you can include CVs and bios as an appendix.

We received a number of questions relating to the number of grants awarded and the specific breakdown of these awards, including award amounts, sector type and geographical spread. We have condensed all these questions into the following generic question as the response is the same for all:

**How many grants has the fund made to date and can you break this down by size and geographical spread?**

We are happy to share this information publicly and it can be found [here](https://www.heritagefund.org.uk/about/decisions). The awards made by our Heritage Emergency Fund Decision Making Panel are updated weekly, 20 working days after the decision meeting. You can use this link to find the most up to date information. Further details of all awards will be made available to the successful bidder, including information not in the public domain.

**Can you estimate how many grants you will have made when the Heritage Emergency Fund closes?**

We have allocated £50 million for the Heritage Emergency Fund response. We have not predetermined the number of grants, nor the award size.

**The ITT mentions applications and completion reports. We assume the successful bidder will have access to these. Will the successful bidder also have access to previous grant applications from organisations funded through HEF?**

Yes.

**What format is the application and completion data?**

These may be in PDF or excel format. We can discuss the best format for transferring data with the successful bidder.

**If applications close in June will everything be up and running in time for a short interim report in August?**

Awards are being made on a rolling basis, starting at the beginning of May. There are also other elements of the evaluation contract, including stakeholder interviews and case studies. We are keen to action learning from this evaluation in real time, hence the August deadline for the interim report.

**The evaluation report is due in November and grant applications close at the end of June. Do you expect all grant applications to be 4 – 5 months in length?**

And

**You mention about the development of other elements within the HEF, to what extent might these be included in the scope of the evaluation or will these be outside this brief?**

The evaluation covers our Heritage Emergency Fund response which is evolving. It is possible our response will evolve further and we will discuss this with the successful bidder. Money is released up front to successful organisations.

**What is the expectation for grantees to participate in the evaluation? As the expectations set in documentation on the website for grant applicants is for ‘straight forward data collection’?**

We expect all recipient organisations of the Heritage Emergency Fund to participate in the evaluation. We will facilitate introductions for the successful bidder.

And

**Engaging with recipients and other stakeholders in the evaluation: the current environment is obviously very challenging for Heritage organisations, their staff, and also your own teams. To what extent do you feel the various stakeholders who you wish to reach will be willing to take part in this project, and also the longer term value this piece of work can bring to the sector? Are grant recipients aware that the evaluation is taking place?**

In the application guidance grantees have been told ‘We expect all recipient organisations of the Heritage Emergency Fund to participate in the evaluation.’  We will facilitate introductions for the successful bidder but we would expect the successful bidder to follow up with stakeholders to take part in the research.

**What is the remit of project support consultant (ROSS) and how much involvement will they have with this work?**

Part of our Emergency Fund response is an increased budget of approximately £100k for the use of the ROSS Consultants to help mitigate the effects of the COVID-19 pandemic on our grantees and the wider sector. To date this budget has been used to provide additional support for our HEF grantees, support to our staff with Heritage Emergency Fund applications through helplines and videos and support for the sector through guides and webinars aimed at people and organisations who are getting to grips with working at distance and promoting their work online. We have also used ROSS members as a sounding board and to provide individual bits of advice.

**Is the Heritage Fund interested in learning about the impact of the emergency funding on people and communities who engage with the recipient organisations, as well as the organisations themselves, and if so would you be happy to receive proposals which make additions to the methodology anticipated in the ITT?**

We are happy to receive proposals which bidders feel will enhance the evaluation. The ITT outlines the essential elements of the evaluation which we expect to be covered.

**Can you give an indication of how large you would like the survey sample to be?**

We expect bidders to cost activities and produce a sampling strategy as part of their methodology.