

Guidance notes



A commitment from
The Children's Plan



department for
children, schools and families



myplace – Guidance notes

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Information for readers

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Our website	www.biglotteryfund.org.uk

Accessibility

Also available upon request in other formats including large print.

Our equality principles

Promoting accessibility; valuing cultural diversity; promoting participation; promoting equality of opportunity; promoting inclusive communities; reducing disadvantage and exclusion. Please visit our website for more information.

We care about the environment

The Big Lottery Fund seeks to minimise its negative environmental impact and only uses proper sustainable resources.

Our mission

We are committed to bringing real improvements to communities and the lives of people most in need.

Our values

We have identified seven values that underpin our work: fairness; accessibility; strategic focus; involving people; innovation; enabling; additional to government.

The Big Lottery Fund is committed to valuing diversity and promoting equality of opportunity, both as a grantmaker and employer. The Big Lottery Fund will aim to adopt an inclusive approach to ensure grant applicants and recipients, stakeholders, job applicants and employees are treated fairly.

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Thank you for your interest in *myplace*.

This guide is for organisations that want to apply for a grant from ***myplace***, which the Big Lottery Fund is delivering on behalf of the Department for Children, Schools and Families. This is not Lottery funding.

The guide will help you understand the application process and provide key information about the programme. Please read this guidance carefully before you complete the application form.

If you or your main contact have any particular communication needs, such as Braille or large print, audiotape, sign language or a community language, please call us on 0845 4 10 20 30 (textphone 0845 602 1659, this is for those with hearing impairment).

In this guidance we have provided links to external websites, the Big Lottery Fund is not responsible for the content of these websites.

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Foreword

Across the country young people, parents and communities are calling for more and better places for young people to go. Places they can call their own, where they can enjoy exciting activities and get support from people they trust – a real alternative to the ‘street corner’.

Responding to this demand is central to delivering the vision in our strategy *Aiming high for young people*. At the outset of a long-term programme based on both Government and unclaimed assets investment, **myplace** offers an exciting opportunity to transform radically the local offer to young people.

I want **myplace** investment to speak volumes about how much we value our young people. Landmark buildings fitted out to the highest standards, offering high quality activities and opportunities, actively supported by the community and led by young people themselves – what better way to re-engage and excite young people, especially those who face disadvantage, about their place in society?

There are already some excellent examples that demonstrate just how much can be achieved – these projects have set the bar high, and rightly so, because young people deserve it. But there are too few. I want us to learn from the passion, drive and vision of those pioneers who just wouldn’t say ‘no’, to support projects across the country to deliver ambitious facilities fit for the 21st century.

This is no small challenge. It will require commitment from both communities and the delivery partners that serve them, from across the public, third and private sectors. Working together is the only way to deliver a sustainable high quality offer. I want to see these partners thinking creatively and strategically about how to make best use of all existing assets and available investment to improve places for young people to go – particularly in our most deprived neighbourhoods.

I am delighted that **myplace** will be delivered by the Big Lottery Fund. This will enable us to reward the most innovative projects from across the country, and provide them with the support they need to succeed.

BEVERLEY HUGHES

Minister of State for Children, Young People & Families

About the Department for Children, Schools and Families (DCSF)

The Department for Children, Schools and Families works across Government to ensure that all children and young people:

- * stay healthy and safe;
- * secure an excellent education and the highest possible standards of achievement;
- * enjoy their childhood;
- * make a positive contribution to society and the economy; and
- * have lives full of opportunity, free from the effects of poverty.

The Department's aim is to make this the best place in the world for our children and young people to grow up by ensuring that every child gets the best possible start in life, receives an excellent education, and has the support and protection they, and their family, need to allow them to fulfil their potential.

The creation of DCSF in June 2007 established a stronger and more strategic focus on youth outcomes at the heart of Government, including bringing together more closely work on the reform of youth support services, 14-19 reforms, Respect and preventing youth offending. DCSF leads across Government to ensure that all young people are on the path to success, steering and supporting efforts at the front line.

About the Big Lottery Fund (BIG)

The BIG Lottery Fund has been asked to deliver £190 million capital funding to develop world class youth facilities on behalf of the Department for Children, Schools and Families.

BIG's mission is to bring real improvements to communities and the lives of people most in need. We want to make big, positive changes for communities, through the fair and open funding of people, projects and programmes, with a particular emphasis on tackling need.

Whilst primarily a Lottery distributor, the Big Lottery Fund can also deliver funding for charitable purposes from other sources – such as government, or trusts and foundations. We have undertaken to do this only where we feel that we can add real value and ensure a better deal for the beneficiaries of our funding.

Everything that we deliver fits under BIG's three themes:

- * community learning and creating opportunity;
- * promoting community safety; and
- * cohesion and promoting wellbeing.

In England, we have four outcomes underneath these themes that we seek to achieve:

- * people having better chances in life, with better access to training and development to improve their life skills;
- * stronger communities, with more active citizens, working together to tackle their problems;
- * improved rural and urban environments, which communities are better able to access and enjoy; and
- * healthier and more active people and communities.

The Big Lottery Fund runs a full range of BIG programmes, you can find out about these by visiting www.biglotteryfund.org.uk or by phoning the BIG advice line on 0845 4 10 20 30 (textphone 0845 602 1659).

myplace at a glance

myplace aims to deliver world class youth facilities driven by the active participation of young people and their views and needs.

myplace offers a significant opportunity to those with the vision, ambition and drive to deliver world class places for young people to go. It will reward those who:

- * are developing plans for ambitious, world class places that will offer young people the widest possible range of high quality activities, and co-located support services;
- * are putting young people in the lead to plan and deliver dedicated youth projects driven by their views and needs;
- * are working in partnership across sectors to develop robust, financially sustainable co-funded projects that respond to local needs and priorities; and
- * require between £1m and £5m of additional capital investment to deliver an outstanding building project.

We expect to receive more applications than we have funding available, so it is important that local partners work together to identify and develop a small number of high quality projects that will lead to:

- * more young people, parents and communities feeling that young people have attractive and safe places to go in their leisure time where they can get involved in a wide range of exciting activities;
- * more young people, particularly the most disadvantaged, participating in positive leisure time activities that support their personal and social development;
- * more young people having access to information, advice and support services from within places they feel comfortable; and
- * stronger partnership working between local authorities and their third, private and public sector partners to plan, deliver and operate financially sustainable facilities with and for young people.

We will expect all applications to have the endorsement of the top tier local authority to demonstrate that the project responds to local needs and priorities and fits with wider local strategies for youth provision as identified and set out in the Children and Young People's Plan and Local Area Agreement.

If you feel you meet all of the above requirements then **myplace** might be the right programme for you. To find out more, please read Part one of this guide.



The application process

Please see the flow chart below for our programme timetable. Further details of the application process can be found on page 19. Dates may change due to unforeseen circumstances, and if so we will contact you.



- What we will do
- What you must do

Part one: About *myplace*

Aiming High for young people: a ten year strategy for positive activities set out the Government's vision for improving youth facilities in response to clear ongoing demand from young people, parents and communities for more and better places for young people to go. It set an ambition for new and improved places to go in all areas of the country over the next ten years.

To kick start this process, **myplace** will deliver £190m of Government capital investment over the next three years through grants of between £1m and £5m. This will drive both a major change in the level of ambition across the country and a radical transformation in the way places for young people to go are planned and delivered – particularly in the role and influence of young people and the level of genuine cross-sector partnership working.

myplace will fund new or improved places dedicated to and driven by local young people – who should be active participants in every aspect of design and ongoing management. Open at times that suit young people, and clearly affordable for all, these places will give young people access to the widest possible range of exciting high quality sports, arts, music, cultural or youth work based activities, and co-located support services, and potentially also use mobile facilities to reach out to their surrounding area.

All projects will need to make significant local impact and demonstrate genuine cross-sector partnership between public sector bodies and third and/or private sector organisations. The aim is that this ensures the strategic involvement of local authorities, maximises leadership from within the community, and encourages support and backing from the private sector. We will look for capital and ongoing revenue co-financing as a clear indication of the depth of this partnership.

Programme aim

The aim of **myplace** is to deliver world class youth facilities driven by the active participation of young people and their views and needs.

Programme outcomes

Outcomes are the changes or difference that a project can make over time. An easy way to think of them is that they are the result of what you do, rather than the activities or services you provide.

Under this programme, we want to fund projects that will deliver on the following programme outcomes:

- * more young people, parents and communities feel that young people have exciting and safe places to go in their leisure time where they can get involved in an attractive range of activities;
- * more young people, particularly the most disadvantaged, participate in positive leisure time activities that support their personal and social development;
- * more young people have access to information, advice and support services from within places they feel comfortable; and
- * stronger partnership working between local authorities, third, private and public sector partners to plan, deliver and operate financially sustainable youth facilities with and for young people.

myplace will only fund projects that will deliver on **all** four of these outcomes **and** demonstrate evidence of the real participation of young people, particularly disadvantaged young people, in the development, design and future running of the project.

Strategic context

The investment of over £290m¹ of DCSF funding over the next three years and the reinvestment of unclaimed assets from dormant bank accounts will offer a once-in-a-generation opportunity to improve places for young people to go. To make the most of this opportunity the Government believes that it is essential that this investment is underpinned in every area by an integrated and strategic long term plan for creating a diverse network of high quality, dynamic and attractive places to go that reflects local circumstances and the views, needs and aspirations of young people.

The Government has recently set out how it believes local authorities can best achieve this through the development of a 'strategy for change' that sets out visionary and ambitious thinking about how to maximise the potential of all available funding and existing assets across the public, private and third sectors.

This strategic planning should be driven by the active participation of young people and take place in partnership with a wide range of local partners from across the public, third and private sectors within children's trust arrangements. It should consider the need for both large ambitious projects as supported by *myplace* as well as smaller neighbourhood level facilities, particularly in the most deprived areas. This should include projects that can be delivered through the Youth Capital Fund - DCSF funding in every local authority area to be spent at young people's discretion to improve things to do and places to go.

The strategy for change should link to other plans for improving services for young people and the infrastructure that supports their delivery – such as strategies for children's play and school asset management strategies including Building Schools for the Future.

This approach is consistent with the more strategic approach to asset management promoted in the recent guidance to local authorities *Building on Strong Foundations*², and with statutory guidance on local authorities' statutory duty, created through a recent amendment to the Education Act 1996, to secure access for all young people to facilities in which they can access positive activities.

You can find out more about this duty, the Youth Capital Fund, and developing a more integrated and strategic approach to improving places for young people to go at www.everychildmatters.gov.uk/youthmatters

Aiming High provides more information on how the Government is working with the financial services industry to reinvest unclaimed assets in the community. This is available at www.hm-treasury.gov.uk



1. £190m via *myplace* and £102m via the Youth Capital Fund

2. See www.communities.gov.uk/publications/localgovernment/assetmanagement

How much will *myplace* fund?

Capital funding

myplace will make capital grants of between £1 million and £5 million. The capital grant will be paid over a maximum period of two years.

If your funding requirements are less than £1 million or more than £5 million please send an email as soon as possible to myplace@biglotteryfund.org.uk before completing an application and no later than **Friday 27 June 2008**. Your email should include a brief outline (no more than 500 words) describing your project, confirming the level of funding required and explaining why you think we should consider a request for funding of less than £1 million or more than £5 million. We will consider the quality of the proposals and overall demand for funding, and may contact you to discuss your project. Based on this information, we will decide whether you can apply to the programme. We will let you know our decision as soon as we can but no later than **14 July 2008**.

We can fund all or some of your capital project costs but we encourage you to get some of your funding from other sources if you can, as this helps to show a wider range of support for your project and may help it to be more sustainable. Financial or in-kind contributions from your organisation or partners demonstrates their commitment to the project and the depth of the partnership.

Revenue funding

You can only apply to *myplace* for capital costs. You cannot apply for revenue costs. Therefore, we will expect all applications to provide robust plans for how they will finance their ongoing running costs and sustain the benefits of the project.

Third sector organisations may face significant challenges developing a sustainable delivery model. Therefore, where a successful lead applicant is a third sector organisation, a fixed £50,000 sustainability grant will also be made for planning and development work to ensure the facility's long term viability. This can include work to raise the profile of the project, building relationships with young people, the local community and other stakeholders, in order to:

- * engage local young people to ensure a genuine ongoing demand for the activities and services offered through the new facility;
- * generate support from the local community, including recruiting and training volunteers to work in the facility;
- * recruit appropriate local stakeholders, including business and community leaders to participate in governance for the project; and
- * ensure the long-term sustainability of the project through, for example, developing models of social enterprise, applying for revenue grant funding, or developing funding relationships with private, individual or other supporters.

The sustainability grant will be available following your acceptance of the in-principle grant offer and should be spent by the end of March 2010. Any funding through the sustainability grant is in addition to the £1-5 million of capital funding available for each application.

Fast-track applications

To enable early investment in projects which are fully developed and ready to start work now, **myplace** will have a Fast-track process. The Fast-track is a condensed process only open to those applicants who are able to submit a business plan and capital delivery plan as part of their application. This will enable final investment decisions to be made on the basis of the single application.

There is a separate application form and guidance for the Fast-track process.

We expect projects to have at least reached the detailed proposal stage (RIBA stage D) to be eligible to use this process. A glossary of capital terms (including what we mean by RIBA stage D) can be found at Appendix one and guidance on capital delivery plans and business plans can be found at Appendices two and three of this document.

If you have a project that you think is eligible for **myplace** and wish to be considered for our Fast-track process, please send an email as soon as possible to myplace@biglotteryfund.org.uk and before you start to complete an application. Please send this email no later than Thursday 5 June 2008, with a brief outline of the project, the stage of its development, how much funding is required, whether you have a business plan and are in a position to meet our capital delivery plan requirements as described in Appendix two. If you are unable to meet all of the requirements of the capital delivery plan checklist listed in Appendix two, please tell us what is outstanding and when you anticipate being able to meet the requirements. Please use no more than 1,000 words.

The Fast-track has a limited amount of funding available. If demand for the Fast-track is high, we will prioritise those projects that are at an advanced stage of development. You should provide a contact telephone number in case we need to discuss your project. We may also email or telephone you in order to obtain further information and determine whether your project is suitable for the Fast-track process.

We will let you know our decision within 10 working days. Your application will not be considered for Fast-track if you have not contacted us first by e-mailing: myplace@biglotteryfund.org.uk

Complete Fast-track applications must be received by **29 July 2008** and we will tell applicants whether we have awarded a grant by the end of **October 2008**. All Fast-track projects must then start within six months.



Project outcomes

We want **myplace** funding to have significant local impact, driving a major change in the way places for young people to go are designed and delivered. We would therefore like to know about the changes that will happen as a result of your project. These must support the four programme outcomes listed on page 9. We ask that you provide us with up to five SMART (Specific, Measurable, Achievable, Realistic, Timebound) outcomes you expect to achieve after the facility has been completed and is in use. Part of the decision to award you a grant is based on our assessment of the quality of your project outcomes and how they address the programme outcomes. Projects must aim to achieve identified outcomes over a specified period of time, either through a single activity or a number of related activities.

To determine your outcomes, you need to consider the impact that the facility, activities and services will make on young people and the wider community. Be sure to use words of change when describing your intended outcomes, such as: more, better, less, improved. You should also make sure that the intended outcomes refer to changes that are not simply related to the workings of your project - for instance, instead of saying “more young people contribute to decisions about running activities”, say “more young people are more confident and able to express their opinions”.

For more help on using an outcomes approach you should read our ‘Explaining the Difference’ booklet. You can find this on our website www.biglotteryfund.org.uk/explaining_the_difference

The booklet encourages the use of SMART outcomes and activity milestones as they help applicants monitor progress against their plans.

The following are examples of SMART project outcomes. These are just for information.

- * 1,000 young people who use the centre have developed skills for life by the end of the second year of opening.
- * 1,500 young people who use the centre have healthier lifestyles by the end of the first year of opening.
- * 2,000 young people who use the building report that they are more confident about making decisions about their future by the end of the third year of opening.
- * 20 local community groups that use the centre report that they are more engaged in local youth networks by the end of the third year of opening.
- * 2,000 young people a year will have a better understanding of sexual and personal health issues.

Who can apply?

Applications must be from cross-sector partnerships which include at least one public body and at least one organisation from the third or private sectors. In most cases we expect the public sector partner will be a local authority. However, it may be that a health authority, school, further education college or other public sector organisation from within the children’s trust has a key role to play in delivering local youth provision. Applicants must have an agreement with their partner organisation(s). We will ask to see written agreements when projects submit their business and capital delivery plans following the in-principle grant offer. We will prioritise projects which demonstrate good partnership working.

Each partnership must have a named lead applicant that will be responsible for the project and its funding. This may be a:

- * a public body;
- * a third sector organisation; or
- * a private sector organisation. Private sector leads will need to demonstrate that they will not make a profit from the grant funding and that they will account for it separately.

While the partnership may include any tier of local government, we expect all applications to be endorsed by the chief executive of the relevant top tier local authority to demonstrate that the project responds to local needs and priorities and fits with wider local strategies for youth provision as identified and set out in the Children and Young People's Plan and Local Area Agreement. Top tier local authorities include county councils, unitary authorities, metropolitan and London boroughs.

The following cannot be the lead applicant or a partner in an application to **myplace**:

- * individuals;
- * sole traders;
- * organisations in poor financial health; and
- * organisations not established in the UK.

In addition the programme will not make grants to professional fundraisers.

Ownership of land and buildings

The lead applicant must already have security of tenure (freehold or leasehold ownership) of the land and buildings where the capital project will take place, or propose to purchase this as part of the project.

The form of tenure we require you to hold will be a registered freehold or a registered and assignable lease of land and buildings of at least 20 years without a break clause or a lease of land that is acceptable to us.

The minimum number of years remaining on the lease is calculated from the date the lead applicant is in ownership of the land and buildings following purchase or practical completion of the building work.

Religious and political activities

While projects involving religious organisation(s) may be considered, activities that further any political party or support or promote religious belief cannot be funded under this programme. This means that we would not expect facilities funded by **myplace** to be used for the delivery of activities that support political activity or promote religious belief (e.g. religious services or education).

Location

The projects must be based in England. The majority of beneficiaries should be resident in England.

What is myplace for?

myplace aims to deliver world class youth facilities driven by the active participation of young people and their views and needs. Investment will be focused on places that are dedicated to young people that:

- * engage young people as active participants in the design, use and ongoing running of the new facility;
- * offer young people a place to enjoy their leisure time and the widest possible choice of high quality sports, arts, music, cultural or youth work based activities;
- * connect young people with people, services and opportunities that they want and need – ranging for example from sexual health advice, support to launch a social enterprise, or employability skills training;

- * are open at times that suit them, for example throughout the week including on Friday and Saturday nights, at weekends and in school holidays; and
- * are non-profit making and clearly affordable for all young people.

Projects should be focused primarily on young people aged 13 to 19, and young people with learning disabilities up to 24 years. This reflects the age range covered by the duty on local authorities to provide access to positive activities as set out in section 507B of the Education Act 1996.

myplace may fund single purpose projects, such as a dedicated youth sports or youth arts centre, where this meets the above requirements and responds to clear demand from local young people. The programme may also fund facilities for young people within multi-purpose or community projects where this enhances the range of high quality opportunities and experiences available to them, and does not compromise their influence or sense of ownership over the project.

Capital projects may contain elements that are not primarily targeted at young people where this is in their best long-term interest – for example as part of a strategy for ensuring the long term sustainability of youth provision, through the inclusion of commercial units that can be leased to provide ongoing income or the sale of development rights to a contractor to generate capital funding. The type of business must not compromise its appeal to young people or the ethos of the investment nor should it impact on the safety and well being of young people.

Projects may include investment in new builds or in the redevelopment of existing assets and the equipment, fixtures and fittings needed to deliver the intended activities and services in the building. In addition, projects may include investment in modular or mobile facilities where this is part of an integrated strategy for improving provision across a given area. Projects may include the purchase of freehold land and buildings, as well as acceptable leaseholds of land and buildings over 20 years and leases of land acceptable to us.

Examples of projects might therefore include:

- * An ambitious new multi-purpose youth centre led by a third sector organisation, with a commitment from the local authority to fund part of capital and ongoing revenue costs. The facility will offer wide range of sports, arts, music activities and arrangements for youth support services to work out of the centre.
- * A local authority led project to deliver a substantial capital project to redevelop an existing facility that will be leased to a third sector organisation to deliver a wide range of activities and support services. The project includes mobile provision to reach out to communities in the surrounding rural area.
- * A new dedicated youth sports or arts centre offering affordable access to all young people to world class sports or arts activities, led by a non-profit private sector venture in partnership with the Local Authority.
- * A new or redeveloped facility for youth provision constructed as part of a wider school or town centre redevelopment project.

The programme will not fund *purely* mobile facilities or portfolios of unrelated projects.

Programme principles

myplace will focus on supporting the delivery of ambitious world class facilities for young people. The programme has the following key principles:

- * **Young people's outcomes:** impacting on young people's lives, particularly those living within deprived communities and those who would not otherwise participate in positive activities;
- * **Young people's active participation:** empowering young people and putting them in the lead to drive decisions about the design, use and ongoing running of places for them to go;
- * **Accessibility:** responding to local needs and overcoming barriers to enable all young people to access positive activities and support services;
- * **Community cohesion:** providing opportunities for young people to build relationships with others from different backgrounds and encouraging and improving intergenerational relationships;
- * **Community leadership:** encouraging community ownership of assets and the wider buy-in and active support from parents and the wider community;
- * **Partnership:** supporting genuine cross-sector partnership working between local authority, third, private and other public sector partners in developing and delivering the project;
- * **Long-term viability:** ensuring sustainability through robust management, community engagement and ongoing revenue planning;
- * **Co-financing:** encouraging capital co-financing and ongoing revenue co-financing as an indicator of the depth of genuine partnership and the project's long term viability;

- * **Sustainable development:** fostering a commitment to outstanding quality design and sustainable development; and
- * **Strategic context:** responding to local needs and priorities within the context of a wider strategy for improving places for young people to go.



What will *myplace* pay for?

Eligible and ineligible costs

The core grants from the programme will pay for all the eligible capital costs of the project included in your application. However, we will also award a fixed £50,000 sustainability grant to each successful third sector led project for costs prior to the opening of the project.

The following lists give you an idea of the type of spending that *myplace* can and cannot pay for. They are not exhaustive and when we assess your application we may want to discuss this in detail, or include or exclude some items.

Capital costs

By capital costs we mean the costs of refurbishment, extension or new build, as well as associated professional fees, and equipment to be used specifically for the project and included as part of the application.

Eligible capital expenditure includes:

- * building and engineering works (new build, extension, refurbishment, modernisation or conversion) required for the delivery of the project;
- * plant and equipment forming part of the facility;
- * purchase of equipment or fixtures and fittings that are linked to the facility;
- * modular and mobile facilities that support a central facility as part of an area wide strategy for improving youth provision;
- * professional and legal fees associated with capital spending on the project;
- * the purchase of a freehold of land and buildings and leaseholds of buildings of over 20 years;
- * the purchase of a leasehold of land, on terms acceptable to us;
- * VAT on eligible capital expenditure where appropriate (contact your local VAT office for advice); and
- * A contingency sum of around 10 per cent of the total build costs.

Please note that if you are awarded a grant the Big Lottery Fund will require the provision of specific legal documents such as a legal opinion, certificate of title, deed of dedication, restriction on title and legal charge. The Big Lottery Fund will provide a standard form of these documents for use by your solicitor. The legal costs incurred by you in providing such legal documents are eligible project costs against which capital grant can be paid and you should make provision within your budget for the legal costs you will incur in providing these documents. Detailed guidance is available on pages 24 and 25 regarding the level of fees you should make provision for but you must consult your own solicitors for their advice and estimates.

Ineligible capital expenditure includes:

- * costs incurred in developing this application;
- * costs incurred or spending committed before you are awarded a grant;
- * any costs which someone else is paying for, whether in cash or in kind;
- * routine repairs and maintenance;
- * general improvements to public areas unless they are essential to the overall project;
- * personal equipment;
- * minibuses or transport; and
- * maintenance of equipment.

Revenue costs

You cannot apply for overheads (for example, rent and utilities) and revenue costs (for example, staff or volunteer costs) under this capital programme.

Sustainability grant

If you are a third sector organisation leading the application and you are awarded an in-principle grant you will have access to a £50,000 sustainability grant towards costs prior to the opening of the project. This grant will be available following your acceptance of the in-principle grant offer and should be spent by the end of March 2010. Funding is for planning and development work to ensure the facility's long term viability.

This can include work to raise the profile of the project, building relationships with young people, the local community, and the wider stakeholder community, in order to:

- * engage local young people to ensure a genuine ongoing demand for the activities and services offered through the new facility;
- * generate support from the local community, including recruiting and training volunteers to work in the facility;
- * recruit appropriate local stakeholders, including business and community leaders to participate in governance for the project; and
- * ensure the long-term sustainability of the project through, for example, developing models of social enterprise, applying for revenue grant funding, or developing funding relationships with private, individual or other supporters.

Eligible sustainability grant expenditure includes:

- * salaries of staff working on planning and development, including any extra costs, such as pensions and National Insurance;
- * recruitment of staff and volunteers;
- * expenses of staff and volunteers, including travel, accommodation, phone bills and stationery;
- * rent, heating, lighting, maintenance and insurance for office space and buildings only used for this planning and development work;
- * training of staff and volunteers;
- * fundraising for continuing the project after the **myplace** grant is over;
- * marketing and publicity for the project;
- * website infrastructure, including increasing central server capacity and interconnection costs;
- * software; and
- * website content design and development, including the use of consultants or designers.

Ineligible sustainability grant expenditure includes:

- * costs incurred or expenditure committed before we make you a grant;
- * any costs which someone else is paying for, whether in cash or in kind;
- * items that only benefit an individual;
- * travel outside the UK;
- * funds to build up a reserve or surplus, whether distributable or not;
- * loans or loan repayments; and
- * contributions to general appeals.



Part two: Applying to *myplace* for funding

This section gives details of the application process including the timetable for *myplace*. Detailed notes about completing the application form are in Part three on page 29.

Programme timetable for standard application process

3 April 2008	<i>myplace</i> launched
6 May 2008	Applicants can access an application pack.
5 June 2008	Deadline by which applicants wanting to use the Fast-track process should have contacted us. This timetable is for the standard process. There is a separate application form and timetable for the Fast-track process (see page 12).
30 September 2008	Closing date for standard applications Complete application forms must be received by 2pm.
14 October 2008	We normally acknowledge applications within 10 working days of us receiving them. This is the final date by which we will have acknowledged receipt of applications.
October 2008 – January 2009	Assessment We will undertake an assessment of your application and may contact you during this process.
End of February 2009	We will tell you the decision made on your application.
March 2009 onwards	Successful applicants We will send successful applicants an in-principle grant offer letter, which must be signed and returned within four weeks. We will also send guidance on preparing a business plan and a capital delivery plan.
Following receipt of signed in-principle grant offer letter	Up to five per cent of the grant will be available to develop your project and capital delivery plans. The £50,000 sustainability grant will be available to third sector lead organisations.
Within six months of the date you accept the in-principle offer	Successful applicants must submit business and capital delivery plans.
Within four months of receipt of your business and capital delivery plans	The business and capital delivery plans will be reviewed. This will take up to four months. We will contact you during this process, and may ask you to make changes.
Within one month of the date of your business and capital delivery plans being approved	If your business and capital delivery plans are approved, we will contact you to discuss the payment of the grant. We will do this within one month of our approval of your business and capital delivery plans.
Within six months of the date of your business and capital delivery plans being approved	You must start to spend your grant within six months. You will have up to two years from the date of your first payment to draw down all your funds.

The application process

Once you have read these guidance notes you should send us a completed application form, as well as any additional information we require. If you do not have a copy of this form you can download it from our website www.biglotteryfund.org.uk or request one from the Big Advice Line on 0845 4 10 20 30 (textphone 0845 602 1659).

The application process for **myplace** is open and competitive. The assessment process includes an eligibility check, initial assessment and full assessment. In-principle offers will be made by the end of February 2009. If your application is successful and you are offered an in-principle grant you will be required to submit, for our agreement and approval, a business plan and a capital delivery plan. These must be submitted within six months of our in-principle offer. See the capital delivery plan checklist in Appendix two of this guidance, and the business plan guidance in Appendix three.

Deadline for standard applications

Your application should be sent to the following address, to arrive no later than **2pm on Tuesday 30 September 2008**. There is a separate application form and guidance for the Fast-track process. See page 12 for Fast-track deadlines.

myplace
Apex House
3 Embassy Drive
Edgbaston
Birmingham
B15 1TR

Email: myplace@biglotteryfund.org.uk

If you email your application please put the name of your organisation in the subject field of your email. You must also post all of Section four to us, with original signatures. This must reach us by the above deadline.

How many applications?

There is likely to be high demand for **myplace** funding which means we may have to turn down some good projects and will be unable to support projects in every local authority area. Therefore, we expect local partners to work together to identify a small number of high quality projects; prioritising those that best fit with local priorities and are best able to deliver against the **myplace** programme outcomes.

All applications must be endorsed by a top tier local authority. Top tier local authorities include county councils, unitary authorities, metropolitan and London boroughs.

What do we do with applications once we have received them?

We will acknowledge receipt of all applications and we will check that you have sent us everything we asked for. If you have not, we will provide details and give you 10 working days from the date of the letter to submit the missing items. If you do not meet this deadline we will not assess your application.

Eligibility check

Once we have received a complete application we will consider the information you provide to ensure your organisation and project meet our programme guidance and requirements. If they do not we may reject your application.

Initial assessment

If the programme is highly oversubscribed then a scoring exercise may be undertaken following the completeness and eligibility check. Applications will be numerically scored and ranked in comparison with other applications, based on what makes a good project.

In particular we will look at:

- * the range and quality of activities and opportunities that will be available for young people as a result of the project;
- * the extent to which the project has and will be driven by the active participation of young people;
- * the strength of partnership working; and
- * the extent to which ongoing revenue funding has been secured or sources identified.

Only the strongest applications will proceed to full assessment.

Full assessment

If your application is complete, eligible for funding under this programme, and passes any initial scoring system, we will carry out an assessment of your project and grade your application against the following main criteria using the information provided in your application form:

- * the extent to which the proposed project meets an identified need and helps achieve the programme outcomes; and
- * the extent to which the partnership can deliver and sustain the project and achieve the proposed project outcomes.

At this stage, we will contact you to discuss your project. You will need to have a contact person we can talk to. They must be able to talk about the project and provide further information if necessary, for example, a more detailed budget breakdown. It will usually take us up to five months to assess your complete application. If it will take longer we will tell you the new timescales.

During assessment, we are particularly looking for applications which demonstrate excellence against the programme principles:

- * **Young people's outcomes.** We will look for projects that show value for money and will deliver significant impact on the outcomes underpinning the youth Public Service Agreement (PSA), particularly for young people living within deprived communities and for those who would not otherwise participate in positive activities (PSA 14 – more information is available from www.hm-treasury.gov.uk)
- * **Young people's active participation.** We will consider the extent to which decisions about the design, use, and ongoing management of the facility have been and will be driven by local young people including:
 - the influence of young people on the architectural design specification for the new facility;
 - the influence young people have on the range of services that will be provided for them to bring about the best possible outcomes for themselves and other young people;
 - the involvement of young people in reviewing and evaluating what is and is not working well within the project; and
 - the inclusion of young people in the day-to-day decision making and ongoing management issues of the project;

Participation Works can advise projects on how to involve young people more in all aspects of managing a project. Voluntary and community sector organisations can access their service free of charge. See www.participationworks.org.uk or call 0845 603 6725 for more information.

* **Accessibility:** We will look at how the project responds to local needs and overcomes local barriers, to ensure that all young people will have access to positive activities and support services. This includes tackling both practical barriers and young people's readiness to participate, including through:

- the provision of an attractive diverse range of activities and opportunities that local young people want, available at times that suit them and at an affordable cost;
- consideration of how young people will get to and from the facility, including on public transport;
- arrangements to ensure that disabled, looked after and other disadvantaged young people are able to access the facility;
- arrangements to smooth the transition of younger children into youth provision;
- co-location and cross-agency working arrangements to improve access to more targeted and specialist youth support services;
- arrangements for community outreach – for example to dispersed or rural areas; and
- the relationship with other local services, for example links to or co-location with schools, or support for and links to other local youth provision.

* **Community cohesion.** Encouraging and improving intergenerational relationships is essential to building stronger communities, particularly in the most disadvantaged areas. We will look at how young people will have opportunities to build relationships with and learn along side those of different ages and from different socio-economic, cultural or faith backgrounds and adults from the wider community.

* **Community leadership.** We will look at how communities are actively engaged in improving places for their young people to go. This may include any plans for community ownership of assets as well as how parents and the wider community actively support local projects, including through their active participation in decision making and governance, and in working directly with young people.

* **Partnership.** World class places for young people to go need be developed and delivered in partnership. Local authorities have strategic responsibility for young people's outcomes; the third sector often has greater ambition, reach and access to co-financing; and the private sector has much needed resources and expertise. We will be looking at:

- partners' previous experience of partnership working and the range of appropriate skills, knowledge, and expertise they bring to the table; and
- how clearly defined the partners' roles and responsibilities are, their aims and objectives, and decision-making, evaluation and monitoring processes.

* **Long-term viability.** It is essential that projects receiving *myplace* capital investment are viable and financially sustainable in the long term. We will therefore look for evidence of:

- robust management and governance arrangements;
- diverse and secure sources of ongoing revenue backing, whether from grant funding, private funding, or income generation through social enterprise; and
- excellent relations with young people and the local community, providing confidence there will be ongoing demand for the activities and services to be offered and a supply of local volunteers to work with young people in the new facility.

* **Co-financing.** Although not a formal requirement in its own right, we will consider capital co-financing and ongoing revenue co-financing as an indicator of the depth of genuine partnership behind a project, and of a facility's long term viability.

* **Sustainable development:** We will look for a commitment to, and evidence of, outstanding quality building design. This includes meeting social, economic and environmental goals in an integrated way so that people can enjoy a better quality of life, without compromising the quality of life for future generations. We will look at how projects:

- socially - create a lasting sense of belonging and wellbeing across the community and tackle factors that contribute to young people feeling isolated;
- economically - develop links to local employment, training and enterprise opportunities for young people; support youth entrepreneurship; increase take up of volunteering opportunities and community work; and use materials or services that have been sourced locally; and
- environmentally - choose, use, reuse and recycle materials during design, manufacture, construction and maintenance; use alternative technology; and produce less toxicity, water, noise and spatial pollution.

* **Strategic context.** We will look for evidence that projects respond to local needs and priorities as identified in the Local Area Agreement, Children and Young People's Plan and other relevant service and asset management strategies and funding plans.

Decision-making

If your project meets the **myplace** criteria, your application will be presented to the decision-making committee. We will write to you with our decision by the end of February 2009 and tell you whether you have been awarded an in-principle grant. If we decide not to offer a grant for your project we will tell you why and may offer you the opportunity to be on a reserve list.

myplace has £190 million for capital grants in England. We expect to make grants across a good geographical spread, subject to the quality of projects we receive. We expect to get more applications for good projects than **myplace** can support and grant funding decisions are made at our own discretion.

If you are awarded an in-principle grant

If you want to accept the offer of an in-principle grant you will have to accept the **myplace** terms and conditions within four weeks. Draft copies of the **myplace** terms and conditions can be downloaded from the following link: www.biglotteryfund.org.uk/prog_myplace.htm?regioncode=-uk&status=theProg. There are draft terms and conditions for capital grants to third and private sector organisations, draft terms and conditions for local authorities and draft terms and conditions for the sustainability grant. You will be accountable for the grant(s). This means that even though you are in a partnership with another organisation and you may also be sub-contracting some of the work, you are responsible for ensuring that the project is delivered, and that the project outcomes are met within agreed timescales and budget and in line with our terms and conditions.

To support the **myplace** programme a contractor will be appointed who will champion the development of high quality youth facilities and also deliver a package of support for individual projects in receipt of **myplace** funding.

Business plan and capital delivery plan

If your application is successful and you accept the offer of an in-principle grant you will be required to submit, for our agreement and approval, a business plan along with copies of partnership agreements, and a capital delivery plan in the form of a capital delivery plan checklist. See the capital delivery plan checklist in Appendix two of this guidance, and the business plan guidance in Appendix three.

The completed plans and accompanying information should be submitted within six months of the date you accept the in-principle grant offer. When we have received this information we will undertake a detailed review of your business and capital delivery plans. You will be contacted during the review process and we may want to visit you to discuss with you and your professional team the information you have provided. We may use technical advisers to assist us with this review.

This stage is not competitive. However, if there are any key issues or risks we identify as part of the review, we will discuss these with you and agree a timetable for their resolution or amendment. If the business and capital delivery plans are not acceptable to us, the in-principle grant offer will lapse.

If the business and capital delivery plans have been completed to our satisfaction we will contact you to discuss the payment of your grant.

You will receive further details about this process if you are awarded an in-principle grant.

Lead in payment

We understand that most *myplace* in-principle grant holders will need to appoint professionals to enable them to develop the capital element of their project to the requirements of the capital delivery plan checklist and to meet our legal requirements.

We will therefore normally release up to five per cent of the capital grant to help cover the costs you will incur in developing your project to the requirements of the capital delivery plan checklist.

We will not be able to release any payments above the five per cent until we have received and approved your business plan and capital delivery plan.

Sustainability grant

If you are a third sector organisation and you accept the offer of an in-principle grant we will make a £50,000 sustainability grant. This will be available following receipt of your signed in-principle grant offer letter. Further details of this grant can be found on page 17.

Legal Requirements

If you are awarded a grant, we will set out in the grant offer letter the timetable within which you will be required to meet specific terms and conditions for the grant. We will also set out the timeframe within which you will need to start the capital works.

All grants are subject to terms and conditions, which include the following requirements.

Certificate of title

If you are awarded a grant, you will need to provide a completed certificate of title from your solicitor before we can make capital payments. You must provide the certificate of title in the standard form we require, which will be available on request. The certificate of title must be signed by your solicitor, who will be acting under a duty of care to us, and will confirm:

- * the nature of the title;
- * that all relevant searches have been made and no adverse entries found; and
- * that the title is good and marketable with no easements, restrictive covenants or leases, and in the case of leaseholds includes no break or forfeiture provisions, which would prevent the full and continuous use of the facility by young people for a period of at least 20 years in accordance with the grant agreement.

You should make provision within your project costs for the legal fees you will incur when providing the certificate of title. As an indication only, we think it is reasonable to include an estimate of up to £500 plus VAT. Your solicitor will advise you on the cost of providing a certificate of title, which should include the search fees, land registry and companies house fees.

Buying land and buildings

If you are awarded a capital grant to purchase land and buildings we will not release the grant for the purchase until after we have agreed and approved your business plan and the information submitted with the capital delivery plan checklist. Before we can make payment for the purchase of land you will also need to send us the following information:

A letter from your Solicitor or a Licensed Conveyancer requesting that we pay grant to the solicitors' client account on order pending completion. This letter should briefly describe the transaction, the estimated date for exchange of contracts, the proposed date that we should pay the solicitors and confirmation that they are acting on behalf of your organisation.

Ownership of Land and Buildings

See page 14 for further details for eligibility requirements and security of tenure.

Where a building is to be constructed on land that you will lease, the landowner should grant you a development agreement with an agreement to lease attached. The development agreement will allow you to occupy the land during construction. The agreement to lease will allow you to occupy the land or building once the work is completed.

Our security requirements

If you are awarded a **myplace** grant, we must ensure that the capital assets will be used for the grant purpose for the period of the grant agreement. This means we require you to make legal commitments to us to secure grant purpose. The form these take depends on the type of organisation receiving the grant.

Local authorities

If the organisation in receipt of the grant is a local authority, it will need to provide a completed deed of dedication before we can make any capital payments. The deed of dedication must be completed in the standard form we require.

You should make provision within your project costs for the legal fees you will incur providing a deed of dedication. As an indication only, we think it is reasonable to include an estimate of up to £750 plus VAT. Your solicitor will advise you on the cost of providing a deed of dedication.

Third and private sector organisations

If the organisation which will be in receipt of the grant is a third or private sector organisation it will need to provide a fixed charge over the land and buildings before we can make any payments. This will be in the standard form we require. You should make provision within your project costs for the legal fees you will incur in providing the charge. Your solicitor will advise you on the cost of providing the charge. As an indication only, we think it is reasonable to include an estimate of up to £1,000 plus VAT.

Legal opinion

If you are a third sector or private sector organisation, you will be required to provide a legal opinion from your solicitor before we can make any capital payments. The legal opinion must be completed in the standard form we require and be signed by your solicitor, who will be acting under a duty of care to us. The legal opinion will confirm that your organisation has the powers under its Governing Document for the project purpose and to sign the legal documents associated with your grant.

You should make provision within your project costs for the legal fees you will incur providing a legal opinion. As an indication only it would be reasonable to include an estimate of up to £500 plus VAT. You should take advice from your solicitor on the cost of providing a legal opinion.

Capital assets

You may not sell, transfer, lease or otherwise dispose of land and buildings extended, refurbished, altered and or improved with the grant without our written permission.

You may not change the purpose for which the capital assets are being used without our written permission. We will hold you responsible for the condition of and use by young people of the land and buildings for at least 20 years as specified in the terms and conditions of grant.

Insurance cover

You will be responsible for making sure that you have appropriate insurance cover while any capital works are in progress. You must also ensure that you have appropriate insurance for the lifetime of the grant and beyond. We may ask you to provide evidence of insurance cover as part of our monitoring checks. Local authorities may decide not to take out such insurance, if it is legally allowable. If you are not going to insure the land and buildings we have funded, you must tell us this and agree in writing to repair or replace the land and buildings for the original purpose in the event of damage.

State aid

All disposals of assets must comply with State aid rules. When disposing of publicly owned land or property at less than best consideration, public authorities are providing a subsidy to the owner and/or the occupier of the land and property. The local authority must ensure that the nature and amount of subsidy complies with State aid rules, particularly if there is no element of competition in the disposal process.

Failure to comply with the rules means that the aid is unlawful, and may result in the benefit being recovered with interest from the recipient. Further information and guidance on State aid is available on the website of the Department for Business, Enterprise and Regulatory Reform: www.berr.gov.uk/bbf/stateaid/index.html

Statutory obligations

You will be required to meet your obligations under the legislative framework for England. For example: recipients should ensure that building projects fulfil the requirements of the Disability Discrimination Act. Other areas to consider include health and safety regulations, data protection and human rights legislation. We suggest you seek advice from either your own adviser or the relevant Government agency.

Procurement

You will be required to seek at least three competitive tenders for building work unless the work is being undertaken under a pre-tendered arrangement such as a Public Private Partnership or Private Finance Initiative scheme. Before we can pay a capital grant to you for building work, you will be required to show that an appropriate procurement process has taken place by providing us with a copy of the completed tender review report. Where building work is being commissioned under pre-tendered arrangements, you must still show that contract costs have been checked to confirm value for money. If you do not intend to accept the best value tender for the building work you must explain why not and obtain our consent. We will provide further guidance on our tender review requirements in our 'Guide to Your Grant' documentation.

Before you enter into a building contract you must seek our written acceptance of your choice of contractor. We cannot give you extra grant, if the prices given during the tender process are higher than the estimates given in your application. You could fund the balance yourself, negotiate a reduced tender amount or send out the tender again. If you still cannot match the original estimate, you should contact your grants officer to discuss the problem. You must tell us if you want to make any changes to the scope and specification of works proposed to bring it within budget. You must get written approval from us before going ahead with any changes.

Public bodies and organisations receiving grants from public bodies must meet the relevant UK and European legislation on procurement, together with the provisions of the World Trade Organisation General Procurement Agreement. You need to check whether they apply to your project. If they do, you must tender openly for the goods and services in accordance with these regulations.

Monitoring your project

You will need to provide us with information at various points in the project so that we can find out what difference the money has made, and make sure that it is well spent.

We will expect you to monitor your project during the life of the grant. We also encourage you to monitor your project for your own purposes. This will let you see whether your project is working well and make changes that will improve your services and provide better value.

We will expect you to tell us about the types of people that are using your project and we will use this information to determine whether this grant programme is promoting equal access.

Before you start your project we will make sure that you know what information you will need to give us during the life of your grant so that you can plan what aspects of your project to monitor.

Evaluating your project

If you are awarded a grant, we want to ensure that your project makes a difference. You will also want to know how your project is doing, and how far it is achieving what it has set out to do. We will want to learn from projects and programmes and we have to account for the money that has been invested. There are various ways that we can do this. We will ask you on a regular basis about project progress, and at the end of the project, we will ask you how far you have achieved your aims. We may also evaluate the programme and may ask you to take part in this wider evaluation.

Self-evaluation is the general name for a process that allows you to record and review your own progress. Doing this has several advantages:

- * you can identify what is working well and what is not working so well for your project, and reasons why. You can then make changes to the way that you run your project so that it achieves even more;
- * you can gather information that will help you report to us and to others about how your project is performing and what it is achieving;
- * you can identify good practice and help other projects to improve the way that they work;
- * later in the life of your grant, you can provide more convincing evidence to potential funders about the success of your project, and how you have adapted it to changing circumstances; and
- * setting up a system of self evaluation is part of good project planning and management. Self-evaluation is something that you are in charge of. You can work with people involved in your project to identify the main issues, how to investigate them, and what to do with the findings.

You may want to undertake self evaluation within your project, or you may want to get support and advice from other agencies, or even to appoint a consultant. Good planning will help you to ensure that your project is more likely to achieve what it sets out to do, and to provide you with evidence to seek further funding in future.

For further information about approaches to self-evaluation, please see link to our online document http://www.biglotteryfund.org.uk/eval_self_evaluation_uk.pdf

Public announcement and acknowledgement

We are required to tell the wider public about the grants that we make and, as part of this process, we may want to publicise your project. However, when doing this we recognise the need to maintain the confidentiality of vulnerable groups and their details will not be made public in any way, except as required by law.



Part three: Before you fill in your application form

Before you fill in the application form you will need to have planned your project in detail. Grants will only be made to organisations that can show us that they have the capacity to manage them effectively. Your grant comes from public funds and you must be able to account for the funding provided by **myplace**. You need to think about the following:

Management and staffing

We expect you to have adequate structures in place to manage the project. The structure will depend on the type of organisation you are, but it could be a management committee, a sub group, a project board or the management team of a department.

Partnerships

myplace requires all applicants to be part of a cross-sector partnership, which include at least one public body and at least one organisation from the third or private sectors. In most cases we expect the public sector partner will be a local authority. However, it may be that a health authority, further education college or other public sector organisation from within the children's trust has a key role to play in delivering local youth provision. We may ask to see a copy of any agreement, contract or Service Level Agreement (SLA) during assessment.

A key part of the assessment of applications for **myplace** will be focused on the strength of partnership working in developing and delivering the project. You should identify the nature of the partnership and the roles and responsibilities of the organisations in developing and the ongoing delivery of your project.

You should consider what support the partners will provide and how they will work together to manage, deliver and sustain this support. Examples of the types of support that other partner organisations may provide include:

- * advising on the project in relation to use of the asset;
- * providing capital or ongoing revenue co-financing;
- * consulting local people and groups;
- * providing training;
- * seconding staff to work on the project;
- * line managing project workers;
- * managing referrals to the project;
- * delivering activities;
- * providing equipment and services; and
- * evaluation.

For more information about partnerships please refer to the document 'Working in partnership: a sourcebook' on our website www.biglotteryfund.org.uk/er_eval_working_in_partnership_sourcebook_uk.pdf

Policies and procedures

It is important that you have appropriate policies and procedures to manage the project and that you explain how you will apply these to the project. These may include policies such as equal opportunities, health and safety and procedures that will allow you to manage your finances, staff and any aspects of your project work. It is important that you meet our equality principles, listed at the front of these guidance notes on page 2.

As you are applying for a project to work with young people we will need to be sure the young people you work with will be safe. As a minimum you must have a policy that explains how you make sure of this and that the policy is put into practice. It is your responsibility to have acceptable child protection policies and procedures in place, which the Big Lottery Fund may ask to inspect during assessment

or at any other time. NSPCC has produced a number of step-by-step guides for organisations to safeguard children, including Stopcheck and Firstcheck. You can download them from their website at www.nspcc.org.uk or buy a copy by calling 020 7825 7422. We suggest you read this advice to help you develop child protection policies and procedures. There are more sources of help available on our website www.biglotteryfund.org.uk

Planning your project

You do not need to have prepared business and capital delivery plans by the time you send us your application form, but you will need to have planned your project in some detail to allow you to fill in the form. If you are awarded an in-principle grant, you will need to write business and capital delivery plans. You will need to build this requirement into your project plan; it is likely that it will be the first key milestone of your project. You will need to think about what you will need to do to achieve this milestone and you must show that you have done this in your application form. Writing the plans should enable you to fully plan the project in detail. You should not start delivering your project until the business and capital delivery plans have been approved.

Costing your project

In the application form you must provide a project budget showing what the capital grant will pay for. You need to be able to justify the amount of funding you have asked for. When you prepare your budget costs, you should bear in mind that you must develop business and capital delivery plans to submit to us to meet the requirements of the terms and conditions of the grant. If you need funding to cover professional fees, you must take it into account when budgeting for your project.

You should consider your VAT position carefully. Your ability to charge income as part of your ongoing revenue sustainability plan may have a consequence on your current VAT position. When calculating the total cost of your project you should take into account any VAT costs that may arise. We cannot provide VAT advice so you should contact your local Revenue and Customs office to determine your position.

Applicants should ensure that they include within their total capital costs a realistic and justifiable contingency.

Income and expenditure forecast

Please also send us an income and expenditure forecast for the first five years of operation for the completed facility, when you send us your application form.

It is important that you have procedures in place for handling and managing the project budget. This includes a proper bookkeeping system, regular financial checks and properly prepared accounts. We would expect you to comply with the Statement of Recommended Practice (SORP). For further information on SORP refer to the Charity Commission website at www.charity-commission.gov.uk

Options appraisal

An options appraisal is a key part of the planning process for all projects involving land and buildings. To be considered for funding, you must send an options appraisal with your grant application.

An options appraisal should give details of all the options you have explored for how your capital project will deliver the accommodation needs and should include the option of leaving things as they are. It should give details of your preferred option, and an explanation of why you have chosen it.

For each option considered you should cover the following areas:

- * how it will address the need your project aims to meet;
- * how it will help deliver the project's objectives, benefits and outcomes;
- * the estimated costs (capital and revenue costs); and
- * a risk assessment.

Application form help notes

This section gives detailed advice about how to approach each of the questions on the application form.

Please read these notes carefully before you start filling in your application form and refer to them as you go along. This will improve your chances of success. You must answer each question that is relevant to your organisation and project on the application form and respond to the guidance in these help notes.

Section 1: Organisation details

1.1 Organisation name

If you are a third sector or private sector organisation give the name shown in your governing document, for example your constitution, rather than any brand or operating name. This is the organisation that will receive the grant and sign the terms and conditions if the application is successful. It must therefore have the powers set out in its governing documents to deliver the project and accept our terms and conditions.

If your organisation is also known by another title please put this in brackets. For example 'The European Children's Trust (known as 'ECT').'

1.2 Organisation address

This should be your registered address. It is important that you provide the correct postcode, phone number and if you have them, fax number, textphone, email and website address.

1.3 Related organisation

Local authorities do not need to answer this question. If you are a branch of, or related to, a larger organisation that may have some legal responsibility if you are awarded a grant, you need to make sure they are aware of your project and the funding that you are applying for.

1.4 Main contact details for the project

This should be the main contact involved in your application. They should be able to talk about your project in detail and be able to supply contact details for someone who has expertise on specific areas, if required. It is very important to us that you provide the correct postcode, phone number and if applicable fax number,

textphone, email and website address. Please let us know if the main contact has any particular communication needs. We have listed some of the most common, but please add to this if necessary.

1.5 Organisation Type

You should confirm the sector your organisation fits into. If you tick other please describe the nature of your organisation. For further information on who can apply for funding, see page 13.

1.6 Reference or registration numbers

You should complete this section if you are a third sector or private sector lead organisation.

1.7 Your organisation's bank or building society account

Please read the information in this section carefully before completing. We only require third sector and private sector lead organisations to complete this section.

1.8 Your organisation's accounts

All applicants should read this question. If you are a statutory authority we may ask to see your most recent management accounts.

Section 2a: About your project

Where directed, you should answer the questions using no more than the stated word limits, and only using the space provided. Use bullet points if it helps make your answer clearer. If you do not answer all the points on each question we may not be able to assess your application.

2.1 Project name

We need a short (no more than 10 words) relevant name for your project. We will use this title for any correspondence and if you are awarded a grant, for any press releases that we make about your project.

2.2 Project location

Complete the table to tell us where your project will be located and its postcode. Although we anticipate that most projects will be on a single site, in some exceptional cases a project will be delivered in more than one place, but this should be part of an integrated strategy for improving provision within a given area.

If so, tell us the locations and postcodes for each delivery location. Estimate the percentage of the grant that will be used to deliver the project in each location.

2.3 Project summary

Briefly describe your project. Give details of the asset you wish to build or develop. Summarise the intended use of the finished building and the activities, opportunities and services that will be available to young people. Your answer should not exceed 300 words.

In the second box, briefly describe why the youth facility you plan to build or refurbish will be world class. **myplace** aims to drive a major change in the level of ambition across the country and transform the way places for young people to go are planned and delivered. For example, tell us how your project will make a lasting impact that will inspire, motivate and excite those that use the facility, as well as the wider community. Your answer should not exceed 300 words.

2.4 Project beneficiaries

Tell us about the young people that will benefit from your project, any disadvantages they may face and the needs they have. Tell us what arrangements you will put in place to overcome the barriers young people may face in accessing the project. You should read the notes on pages 21, 22 and 23 for further information on the programme principles, young people's outcomes and accessibility. This answer should not exceed 400 words.

Please tell us how many young people you estimate will benefit directly from your project per year.

2.5 Active participation of young people

Tell us how the project has been driven by the active participation of young people and their views and needs. Tell us how you plan to continue young people's participation throughout the life of the project. Include details of how young people have been involved in researching and identifying the need for the project; how young people have influenced the design, planning and development of the project; and how young people will be involved in ensuring

the ongoing delivery of activities and services responds to their needs. Further information can be found on page 21. Your answer should not exceed 600 words.

2.6 Community participation

Please tell us how the wider community has been involved in the planning and development of the project. Tell us how you will ensure ongoing community support and any plans for the continued active participation of the wider community, including through volunteering, mentoring or training; and involvement in decision making, management and operation of the facility. Tell us how this will develop intergenerational relationships. You should read the notes on pages 21, 22 and 23 for further information on the programme principles and community leadership. Your answer should not exceed 400 words.

2.7 Project need

What is the need for your project?

In no more than 600 words, please explain the need for your project. Tell us how the project responds to local needs and priorities and fits with wider local strategies for youth provision as identified and set out in the Children and Young People's Plan and Local Area Agreement. Tell us what impact your project will have on existing provision.

How have you identified that need?

Tell us about any research you have carried out that supports the need for your project. Include details of how you consulted with young people and stakeholders, if not already covered in 2.5 and 2.6 above, and how you ensured it was inclusive. Tell us about any other organisations you have worked with to help develop your project and explain how the work you have done with stakeholders has helped to identify the most important priorities. Your answer should not exceed 400 words.

2.8 Sustainable development

Please provide details of your commitment to outstanding building design, and how your project embraces the principles of sustainable development. (400 words). You should read the notes on pages 21, 22 and 23 for further information on the programme principles and sustainable development.

Section 2b: Capital works and site information

2.9 Capital works

Briefly explain in this section what building works are proposed in order for you to fulfil this project. Tell us what currently exists at your proposed site and how you plan to progress from this to your finished build. While your answer should contain no more than 800 words, you can submit with your application any supporting information that is relevant.

When you send us your application, you will also need to send us:

- * an options appraisal, giving a description of the options you considered for delivering the land and buildings part of your project, including the estimated costs for each option, and the reason you chose this option to meet your need; and
- * the capital project timetable. This should give details of the planned timetable for your project, including when the principal feasibility, planning, design and construction activities will take place.

2.10 Site ownership

Confirm the interest that you hold in the land or building. If you hold or plan to take a lease then tell us over what period this will last. If you are planning to purchase the site tell us how much it will cost. If you do not own the land or building then please tell us who does.

2.11 Planning information

Give details of whether planning permission is required and whether it has been applied for.

Section 3: Achieving your outcomes and delivering your project

3.1 Project outcomes

a. Briefly describe what difference your project will make by listing up to five proposed SMART project outcomes.

Consider what outcomes you aim to achieve and break these down into concise bullet points. Please list no more than five outcomes. You need to ensure that your proposed project outcomes meet the programme outcomes. These are listed in the programme guidance notes on page 9. For more help on outcomes you should read our 'Explaining the Difference' booklet. You can find this on our website. Each outcome should not exceed 50 words.

b. How will your proposed project outcomes help achieve the **myplace** outcomes?

Your proposed project outcomes must help achieve all four **myplace** programme outcomes. These are listed in the programme guidance notes on page 9. Explain how your project will address and contribute to the programme outcomes. Your answer should not exceed 600 words.

c. Outcomes table

Complete the outcomes table for each of the project outcomes you have put in question 3.1a. This table will help us to understand the significant stages and events of the project. We will use the information in this section to assess whether your project is likely to lead to your proposed outcomes and whether the project is realistic and achievable.

Please list up to six milestones for each outcome. These should be short bullet points that state the key activities, tasks, services or changes that will take place at different stages in the project.

Within each milestone, you might want to tell us the percentage or number of people you think will participate in or achieve each milestone. You may need to put the same milestone under more than one outcome.

Please give a timescale for reaching each milestone. This should be when the milestone will be achieved, for example 'end of month four' or 'end of project year one'.

3.2 Project delivery method

How will your project bring about your proposed project outcomes? Tell us why your project is the best way to bring about your proposed outcomes. Your answer should not exceed 400 words.

In the second box, explain what methods you will use to measure and track whether each of the outcomes listed in 3.1 are being achieved. Tell us how you will involve young people in the measuring and tracking of progress. Your answer should not exceed 400 words.

3.3 Project Management

a. Demonstrate how the project's management team has the capacity and experience to deliver the capital phase of the project, and the future operation of the completed facility. Explain how you will ensure that you have the right mix of skills, knowledge, experience and qualifications. Identify any assumptions you have made when working out these requirements. Your answer should not exceed 400 words.

b. Please give details of the professional team members you have or will employ on the project, and describe how they will work together with the management team to ensure the success of the project. Your answer should not exceed 200 words.

3.4 Working in partnership

myplace will only give grants to applicants that have formed strong, meaningful partnerships.

a. Tell us how long you have worked with your project partner(s), and whether you have any formal contracts (such as a service level agreement or other legal contract) or informal agreements. Include details of the roles and responsibilities of partners, the support your partners will provide to the project, how partners will be involved in ensuring the ongoing financial viability of the project and any shared vision, goals aims and objectives.

During our assessment we may ask to see copies of any agreements, contracts or Service Level Agreements (SLA) you have in place. You should use no more than 800 words for this answer.

b. Tell us about any previous experience you have of delivering projects with your main project partners or with other organisations. This answer should use no more than 400 words.

3.5 Equal opportunities

Tell us how your partnership will ensure that the young people or organisations you are targeting will know that your project exists, will have access to the project and can use the facilities and services provided. Tell us also how your project and organisation demonstrates your commitment to equality and meets our equality principles, listed in the front of the programme guidance notes. You will need to demonstrate your commitment to equal opportunities throughout your project. For further information please refer to our 'Equality Matters' guide on our website www.biglotteryfund.org.uk. This answer should use no more than 300 words.

3.6 Child Protection

We may ask to see full details of your child protection policies and procedures if you are awarded a grant. Please confirm by ticking the box that your organisation has comprehensive child protection policies in place and that these meet the standards set out below.

As you are applying for a project that works with children, young people or vulnerable adults we will need to be sure they will be safe. As a minimum you must have a policy that explains how you make sure of this and that the policy is put into practice. It is your responsibility to have acceptable child protection and vulnerable adult policies and procedures in place, which we may ask to inspect at any time.

You must demonstrate that any other organisations you engage to deliver projects working with children, young people or vulnerable adults also have procedures in place for their protection.

If you are awarded a grant and have made a false declaration you will be in breach of our terms and conditions.

NSPCC has produced a number of step-by-step guides for organisations to safeguard children, including Stopcheck and Firstcheck. You can download them from their website at www.nspcc.org.uk or buy a copy by calling 020 7825 7422. We suggest you read this advice to help you develop child protection policies and procedures.

3.7 Capital Budget

a. Provide a breakdown of your project's capital costs for the lifetime of the capital build.

Make sure you read the notes on pages 17 and 18 as they will tell you:

- * what capital costs you can ask us to fund and what is ineligible; and
- * what legal costs associated with a grant award you should make provision for.

You should consider carefully how much your project will cost in total, and how much you need to ask us to fund. Complete the budget sheet using the headings on the application form so that we can see what costs your project will include. You should also include any costs that you will incur for professional fees during the development of your business and capital delivery plans if you are awarded an in-principle grant. A contingency sum of around 10 per cent of the total build costs should be included in the budget. The contingency sum you request from the programme should only relate to the build costs you request.

b. Tell us how you worked out your costs
Provide information to justify the contingency by explaining why and to what extent these costs could increase. Tell us whether any of your costs are based on quotations. Include any assumptions made on VAT and inflation. Tell us how your stakeholders or partners have been involved in helping you to work out your costs.



3.8 Capital project funding

Please use the table provided to tell us how much capital grant you need from **myplace** in each year.

Tell us where you expect to get any other funding from, how much that will be, whether it is secured or not and whether it is an in kind contribution.

In kind contributions are non monetary contributions such as volunteer labour, gifts of materials, use of equipment. To estimate a value for this type of contribution, you may need to come up with some reasonable way of assessing them. For example, the value of an item could be calculated using one of the following methods:

- * identifying the cost of an item of comparable age and condition;
- * obtaining a valuation from an appropriately qualified source; or
- * taking the original purchase price and applying normal depreciation rates.

3.9 Long term viability

Please tell us how you will secure the ongoing revenue funding you will need to ensure the project is sustainable in the long term - for example through social enterprise, applying for revenue grant funding, or developing funding relationships with private, individual or other supporters. Also please tell us how your management and partnership arrangements, and your relationship with young people and the wider community will contribute to the long term viability of the project. Please use no more than 600 words for this answer.

When you send us your application, you will also need to enclose an income and expenditure forecast for the first five years of operation for the completed facility.

3.10 Sustainability grant

If you are a third sector organisation leading this application and you are awarded an in-principle grant you will have access to a £50,000 sustainability grant towards costs prior to the opening of the project. This funding is for planning and development work to ensure the facility's long-term viability and should be spent by end of March 2010. See page 18 for examples of eligible costs. Tell us how you would spend this money, and in which financial year(s). Please use no more than 200 words for this answer.

3.11 Value Added Tax (VAT)

You should consider your VAT position carefully. Your ability to charge income as part of your ongoing revenue sustainability plan may have a consequence on your current VAT position. All applicants should speak to their local Revenue and Customs office for advice before applying to **myplace**.

When calculating the total cost of your project you should take into account any VAT costs that may arise. If you are registered for VAT you can apply to **myplace** for the cost of non recoverable VAT only. If you later find that the costs of your project increase because you have made an error about VAT, we will not increase the grant to cover this.

We may ask you for evidence from the VAT office to confirm you have contacted them to determine your position.

Section 4: Finishing your application form

This section will help you to make sure that you send us all the documents that we require. You are able to send your application to us by email, on disk or as a hard copy. However section four must be sent to us in hard copy as we need to receive the original signatures.

Make sure that you write the project name in the box provided at the top of section four as this will help us to match your application form with this section if you send them to us separately.

Complete the signatory, enclosures and submission checklists to confirm that you have completed the application form and that you have sent us all the documents we require. Please confirm whether you have either sent your application form by email or whether you are sending all the documentation together.

You cannot apply for grant to cover the costs you incur in meeting the requirements of the application (including supporting capital information). **myplace** can only fund costs incurred, or expenditure committed to, after the date of a grant offer.

Make sure that you read the data protection and freedom of information act statements carefully as your signatures on this form will be taken as confirmation of your understanding of our obligations under the Data Protection Act 1998 and the Freedom of Information Act 2000 and your acceptance that we will not be liable for any loss or damage to you pursuant to our fulfilment of our obligations under the relevant law.

Read the declaration carefully and ensure that an appropriate person signs each section of the form.

Advice and support

You may have questions about how to apply, plan or deliver your project. There are many sources of advice and help. Please visit the **myplace** page of our website, which has frequently asked questions about the programme, or contact our Big Advice Line on:

Phone: 0845 4 10 20 30

Textphone: 0845 602 1659

Email: general.enquiries@biglotteryfund.org.uk

Useful websites

Below we have listed some organisations and websites that you might find helpful.

Adventure Capital Fund

www.adventurecapitalfund.org.uk

BASSAC

www.bassac.org.uk

Charity Bank

www.charitybank.org

Commission for Architecture and the Built Environment

www.cabe.org.uk

Community Matters

www.communitymatters.org.uk

Department for Children, Schools and Families

www.dcsf.gov.uk

Department of Communities and Local Government

www.communities.gov.uk

Design Council

www.designcouncil.org.uk

Development Trusts Association

www.dta.org.uk

Ethical Property Foundation

www.ethicalproperty.org.uk

Every Child Matters

www.everychildmatters.gov.uk

Government's Sustainable Development website

www.sustainable-development.gov.uk/

HM Treasury

www.hm-treasury.gov.uk

Participation Works

www.participationworks.org.uk

Waste Recycling Environmental Limited

www.wren.org.uk

Useful contact details

For detailed policy queries relating to specific regions please call the following numbers. For all general enquiries about applications please call the Big Advice Line 0845 4 10 20 30.

East Midlands 0115 872 2950

East of England 01223 449 000

London 020 7842 4000

North East 0191 376 1600

North West 0161 261 4600

South East 01483 462 900

South West 01392 849 700

West Midlands 0121 345 7700

Yorks & Humber 0113 224 5301



Appendix one – Glossary of capital terms

Access audit

A part of the process of designing a building or site, which considers how disabled people will be able to access the building or site. You can get publications and information about accessibility and audits from:

Employers' Forum on Disability (A membership based organisation)

Nutmeg House
60 Gainsford Street
London SE1 2NY

Phone: 020 7403 3020
Minicom: 020 7403 0040
Website: www.employers-forum.co.uk

Centre for Accessible Environments

70 South Lambeth Road
London SW8 1RL

Tel/textphone: 020 7840 0125
Fax: 020 7840 5811
Email: info@cae.org.uk
Website: www.cae.org.uk

Equality and Human Rights Commission.

Equality and Human Rights Commission Helpline
Freepost
Arndale House
Arndale Centre
Manchester
M4 3EQ

0845 604 6610 - England main number
0845 604 6620 - England textphone
0845 604 6630 - England fax
Website: www.equalityhumanrights.com

Adverse entries

Anything appearing on the documents which prove the landowner's title to the land:

- * which might affect the landowner's ability to use all or part of the land for the grant purposes or
- * which might limit the use of certain parts of the land for a specific purpose or
- * which might have an adverse impact on the value of the land.

Agreement for or to lease

Before the tenant takes a lease (confirming his leasehold ownership), the landlord might confirm in a written document called an agreement for lease that they will give the tenant a lease if certain conditions are met. If they are not met the tenant will not get the leasehold ownership. Therefore, you must be sure that you can meet the conditions of an agreement for lease if the grant depends on you having a leasehold ownership.

Asset monitoring period

The period over which we will monitor your project to ensure that the grant purpose is being met. The period during which we will hold you responsible for the condition and use of the land and buildings funded by the grant starting from the date that the capital works are completed.

Assignable lease

A term used for leasehold land and buildings to show whether the land and buildings can be sold to or given to another owner. The lease will say whether the land and buildings can be given to or sold to another owner and therefore if they are assignable. Often the lease will contain a number of conditions that have to be met before the lease is assignable. These conditions may include obtaining the consent of the landlord.

Break clause

A provision in a lease that allows the landlord or the tenant or both to bring the lease to an end before the full period of years has elapsed.

Building control approval

Confirmation from the local authority building control service that project proposals and plans comply with the building regulations.

Building cost information service (BCIS)

This service from the Royal Institute of Chartered Surveyors provides a quarterly review of building prices that can be used for feasibility studies and forecasting building costs. Average building costs based on the analysis of more than 10,000 tenders are shown in tables per square foot and per square metre for all types of buildings in various locations.

Buildings insurance certificate

Certificate to show that there is insurance for the building and its use.

Building professional

A professional adviser or consultant with specialist training and knowledge employed by you to act for you.

Building regulations

Rules made under powers provided within the Building Act 1994, which apply in England and Wales, which cover the technical aspects of building projects (for example structural, fire safety, ventilation). You or your professional advisers will need to obtain approval that your proposals meet the regulations from the local authority or the approved agent. For further information on building regulations refer to the Department for Communities and local government website at www.communities.gov.uk

Capital assets

Assets that have a large monetary value such as land, buildings, equipment, and vehicles.

CDM regulations

The Construction (Design and Management) Regulations 2007. These cover health and safety regulations for building works.

Certificate of practical completion

Formal document issued under the building contract (by the contract administrator) to show that the building work is complete apart from any defects, which will be corrected by the making good defects certificate.

Certificate of title

A written document from a solicitor confirming that the grant recipient is the leasehold or freehold owner of the land and buildings to which the grant relates and that there is nothing about the land and buildings which might stop the grant being used for the grant purpose.

Change control

The process by which changes to the building contract are managed and recorded.

Contingency

An amount of money (usually expressed as a percentage) built into the total project costs in case part of the project costs more than you thought.

Contract administrator

The person or organisation (e.g. architect, architectural technologist or technician, engineer or building surveyor) named within a building contract to manage the terms of the contract between you and the contractor.

Contractor

The organisation carrying out building work for a pre agreed cost.

Deed of dedication

If the grant recipient does not own the land or buildings to which the grant relates the landowner might be able to sell the building before the purpose of the grant has been met. The deed of dedication is a document the landowner must sign to confirm that the land or buildings will be used for the grant purpose and will not be sold without the consent of the Big Lottery Fund.

Easements

Rights over property that is owned by someone else e.g. rights to cross land with vehicles or by laying pipes and cables.

Elemental cost estimate

An estimate of the costs of a building project, broken down into a series of elements such as external works, preliminaries, contingencies, inflation, etc. The quantity surveyor or building surveyor that you choose to prepare your estimates will be familiar with this term.

Employer's agent

A building professional who is appointed by you to fulfil your duties under the Construction Design and Management Regulations 2007.

Extension

Additional space built on to an existing building.

External works

The works on or in the land surrounding a building for example drainage work, roads and paths and landscaping.

Fixtures and fittings

Items inside a building that are attached to the walls/ceilings/floors or built in as part of the building for example electrical sockets and light fittings.

Final certificate

A document usually issued six to 12 months after the Certificate of practical completion and following the making good defects certificate. It confirms the end of the builder's liability and marks the end of the contract administrator's authority under the contract.

Freehold

A form of ownership of land or buildings where ownership cannot be taken away from the owner unless they agree. This is the most permanent way in which someone can own land or buildings. The owner owns the property forever, or until they sell it or give it away. They do not have to pay anyone for the use of the land and buildings.

Gantt chart

A pictorial representation of a project plan, showing activities (usually as shaded bars); milestones (usually as black diamonds); and dependencies (usually as lines linking the relevant ends of the activity bars).

Good and marketable title

This means that the current owner has complete freedom to sell you the property and no other party has an interest in it.

Grant purpose

What the grant must be used for.

Gross floor area (GFA)

The area inside a building, measured to the inside face of the outer walls. This is prepared by measuring each floor of the building (or plans) and adding them together to give the total.

Ground investigations

A detailed technical investigation of the ground on which a building will be constructed to determine the type of soil and sub soil, how suitable it is for building on and whether it contains any old structures that need preserving, contaminated areas or existing pipes, cables or other services.

Lead building professional

The member of the design team (normally the architect or architectural technologist or building surveyor) who takes overall responsibility for coordinating of the design process and client contact.

Lease

A document containing the rules that show how a particular piece of leasehold land or a leasehold building is owned. The lease will contain rules about how long the tenant's ownership is for and how much rent is paid and when it is paid (among other things). The lease is granted to the tenant by a landlord. The tenant pays the landlord rent for the use of the land and building.

Leasehold

A form of land ownership in which someone (known as the tenant) owns the land and buildings for a limited number of years. The rules of ownership will be dealt with in a document known as a lease (see above). Often the ownership under the lease will be for many years and the tenant will pay a sum of money to buy the leasehold ownership from a previous tenant or from the landlord and then will pay a small rent to the landlord each year during its ownership.

Listed building and listed building consent

A building which, because it has special historic or design features that require protection, has been given 'listed' status by English Heritage and requires special approval if it is to be altered or extended.

Management committee

Members of your organisation's governing body (who may be called trustees, directors, members of the management committee).

Non-recoverable VAT

VAT charged on buying goods, services or transactions that you are not able to reclaim from the HM Revenue and Customs. The following guidance is available from HM Revenue and Customs:

- * VAT Notice 701/7/94 (1 August 1994) VAT reliefs for people with disabilities
- * VAT Notice 701/1/95 (1 January 1995, update February 1997) Charities leaflet
- * VAT Notice 708 (August 1997) Buildings and construction
- * VAT Notice 701/6 (March 1997, supplement April 1997) Charity funded equipment for medical, veterinary etc uses.

You should seek guidance and obtain written confirmation of the VAT position in relation to your proposed project. Unexpected VAT bills can add significantly to the total cost of your capital project.

Parent company deed of guarantee

If a building company is a subsidiary of (i.e. owned by) another, the deed of guarantee states that the parent company must fulfil the contractual obligations (e.g. finish the building for the agreed price) if the subsidiary fails to complete or is closed down.

Planning permission or planning consent

The approval or rejection decision made on a planning application by a planning committee.

Planning supervisor

A person or organisation appointed to oversee compliance with the CDM regulations.

Practical completion

When the construction works have been completed in accordance with the requirements of the contract.

Preliminaries

Costs of work that needs doing before the main building work can start e.g. the contractor setting up the site office.

Professional indemnity insurance

Insurance covering building professionals from civil law claims arising from advice or services provided.

RIBA (Royal Institute of British Architects)

This is the qualifying body for British architects.

RIBA stage D

RIBA stage D, as defined in the RIBA outline plan of work 1998, is headed Detailed Proposals and falls in a projects pre-construction period.

This incorporates the complete development of the project brief, preparation of detailed proposals and applications for full development control approval.

Refurbishment

Renovation, re-equipment, or restoration of a building.

Registerable

Land or buildings are registerable if the ownership of them can be registered at the Land Registry. Freehold ownership is always registerable. Leasehold ownership is Registerable where the tenant still has seven years or more of ownership according to the lease.

Registered land

Land and buildings registered at the Land Registry. If they are registered they will be given a title number, which is unique to the land and buildings, and which the recipient or its solicitors should know and be able to produce. A title number can prove whether a recipient owns the land and buildings.

Restrictive covenant

A covenant acknowledged in a deed or lease that restricts the free use or occupancy of property.

Retention

A percentage of the cost of the building works not paid to the contractor until the work is completed satisfactorily and the making good defects certificate has been issued.

Searches

Questions asked before land or buildings are bought to check if there are any rights, restrictions, covenants or other matters affecting the property that may cause the new owner a problem.

Security of tenure

A good, strong and usually well documented right to own or use a property for a period of time.

Specification

A description of the type of materials or service to be used in the building works.

Tenant

The holder or owner of a lease who pays rent to the landlord for the use of the property.

Tender

A formal process that allows contractors to bid to supply a service or carry out work at a stated cost.

Tender review report

A written report by your lead building professional to report on the tenders received, the work undertaken to check them and the final result after checking.

Tenure

The form of right (title) under which land or a building is held or occupied (freehold or leasehold or licence).

Title

The legal right by which property is owned or occupied.

Unregistered land

Land and buildings not registered at the Land Registry. It is not so easy to prove land ownership as it is with registered land; instead, a recipient will need to show that they own the land by producing legal documents and will usually need their solicitor's help to do so.



Appendix two – Capital delivery plan information

You do not need to submit this information with your application form.

This draft checklist is included for information at this stage and detailed guidance will be provided to organisations offered an in-principle grant.

Draft myplace capital delivery plan checklist

If you receive an in-principle grant offer, you will need to complete this checklist and send the required supporting information before you can start your project. This information forms your capital delivery plan.

Project name

Organisation name

Address of land or buildings

Postcode

A **Tick the boxes to confirm you have sent with this completed checklist the information requested below:**

1. A description of the proposed building works including

- the type of project (i.e. new build, extension or refurbishment),
- the extent of the building works to be undertaken,
- the accommodation and facilities to be created.

and

2. An options appraisal

- A description of the options you considered for delivering the land and buildings part of your project, including the estimated costs for each option, and the reason you chose this option to meet your need.

and

3. Confirmation of ownership of the land and buildings

- for freehold or leasehold ownership a copy of the completed certificate of title
- for land and buildings that you have not bought yet, details of the property you intend to buy including:
 - a description of the land or building you want to buy (if not included in item 1 above)
 - details of the title (freehold or leasehold, including length of lease)

- the timetable for purchase
- a surveyor's report on the condition of the land and building, the current market valuation (with any restrictions on use noted) and the fitness for the intended grant purpose.

and

4. Design information, including:

- a site plan showing the outline of the site, surrounding properties and access routes at a minimum scale of 1:1250
- floor plans showing your proposals at a minimum scale of 1:500
- external elevations of any new buildings proposed at the same scale as the floor plans (or perspectives if only external works)
- section through key parts of building to the same scale as the plans and elevations
- colour photographs (or colour copies) of the existing site or buildings.

and

5. Design team statement

A written statement from the design team, which should include where appropriate, the following:

- a description of the proposed method of construction with an explanation of why the types of materials and services are appropriate and including an outline of the project specification;
- an explanation of how the design meets the requirements of the design brief and the specific needs of the proposed users;
- details of access arrangements, including an explanation of how the building and the site will allow access to, and use by, people with disabilities in accordance with the Building Regulations, Disability Discrimination Act and British Standard 8300, for example ramped access, induction loops, disabled toilets, clear signage, lifts, and details of other public access issues;
- details of how sustainable development has been accounted for in the design, materials and building services, for example proposals to use low-energy products or services;
- details of any project constraints, including any design issues that have yet to be resolved;
- an approximate schedule of areas; that is the number of rooms and their uses, external areas and their uses.

and

6. A cost estimate

- An elemental cost estimate (produced either by a registered professional quantity surveyor, building surveyor or other suitably qualified professional) using square metre rates and identifying allowances made for abnormal costs (for example poor ground conditions) and separately stating the cost of external works, preliminaries, contingencies and inflation.

and

7. A cash flow forecast

- a cash flow forecast for the capital project expenditure and income. The following expenditure items should be identified separately:
 - land, construction / refurbishment
 - non-recoverable VAT, project contingency
 - inflation allowances and professional fees
 - income from different sources.

and

8. Programme for the capital project

- A project timetable, in a Gantt chart, showing the principal feasibility, planning, design, construction and commissioning activities.

and

9. A copy of the planning consent for the proposed scheme

and

10. Details of the site appraisal

- Relevant site investigations (including ground conditions, drainage and services) and surveys of existing buildings undertaken by competent professionals.

and

11. Details of the project team members, including:

- the names and organisation addresses of the building professionals employed with details of their relevant experience and a copy of their professional indemnity insurance certificates
- an explanation of the role and responsibility of the project team members from your organisation and from your professional advisers or consultants, including confirmation of who will have overall responsibility, both within your organisation and within the consultant team, for project managing the capital project.

and

12. Project management strategy and procedures

- A written statement explaining how the project will be managed, what controls there will be to make sure that the capital project meets the timetable and the budget. Include details of:
 - the expected procurement strategy
 - the proposed change control procedures
 - how progress on the capital project will be reported and reviewed
 - how risks will be assessed and what management procedures will be adopted, highlighting the current risks to the project in a risk log
 - how the costs of the project will be managed and the income and expenditure budgets regularly monitored.

and

13. The completed security documentation you have requested to meet the legal requirements under the standard terms and conditions for capital grants

B Tick the boxes to confirm that:**Yes**

- you have contacted HM Revenue and Customs to see whether VAT is payable on the project
- building regulations approval has been / will be obtained (delete as appropriate)
- the CDM Regulations legislation has been complied with in so far as it is applicable to the development of the project to date
- where the property is held on lease, the landlord has given formal consent to any proposed works
- a copy of your Site Waste Management Plan (outline) as per site waste management plan regulations April 2008. See www.envirowise.gov.uk

C Summary of capital costs.

Provide a summary of the capital costs. The costs of land and building purchase, construction, non-recoverable VAT, project contingency, inflation allowances, professional fees.

Capital cost item	Amount £
a. Land or building purchase	
b. Construction costs	
c. Refurbishment costs	
d. Furniture and equipment	
e. Professional fees	
f. Other costs *	
g. Inflation	
h. Contingency (minimum ten per cent)	
i. Non recoverable VAT	
l. Total capital cost	

* (please specify what these are in a separate note if including an amount in this box)

D Details of professional fees

Professional fees total	% of construction costs	Fee (£)	VAT (£)

E Breakdown of construction costs

Costs relating to fees and VAT should not be included in this section.

New build	
Gross floor area (GFA)	m ²
Substructure	£
Superstructure	£
Fixtures and fittings	£
Services	£
Total cost of new building(s) (A)	£
Cost per square metre (expressed as £/m ² GFA)	£ per m ²

Alterations or refurbishment	
Gross floor area (GFA)	m ²
Structural alterations or demolition	£
General improvements or finishes	£
Major repairs	£
Mechanical and electrical services	£
Total cost of alterations (B)	£
Cost per square metre (expressed as £/m ² GFA)	£ per m ²

External /environmental works and groundwork	
Demolition	£
Excavation	£
Ground clearance	£
Roads and car parking	£
Paths, paved areas and hard landscaping	£
Boundary walls and fencing	£
Site layout and planting	£
Mains services and drainage	£
Environmental improvement	£
Other	£
Total cost of external works (C)	£
Total cost of building works (A)+(B)+(C)	£

I certify that the information on this form is correct and that the design, risk assessments, drawings and specifications comply with current construction and health and safety legislation.

Signature of lead building professional

Name

Professional qualification

Name of practice

Address

Postcode

Phone

Fax

Date

I certify that the information on this form is correct.

Signature of Chair, Chief Executive or person of similar responsibility within your organisation

Name

Position

Date

Appendix three – Business plan information

You do not need to submit a business plan with your application form.

This guidance is included for information at this stage and detailed guidance will be provided to organisations offered an in-principle grant.

If you receive an in-principle grant offer, you will need to provide a business plan before you can start your project. Your business plan should cover the following information.

Executive summary

This should be a concise summary of the overall business plan which highlights the most important features of your project including:

- * a short description of the scope of your project including what it will do, what it will achieve and who will benefit from it;
- * a summary of how you are going to deliver the project including timetable, budget and resource considerations;
- * who the key beneficiaries, partners and relevant organisations are and how you will work with them.

Organisation Summary

This section should include an outline of your organisation's aims, objectives and legal status. You should also describe the:

- * services and activities your organisation currently provides, how these are delivered and who benefits from your work;
- * organisation's management structure, decision making processes and key lines of communication or reporting;
- * roles and responsibilities of the board members or trustees and senior management team; describe their skills, experience and expertise, and their current and future involvement in this project.

Identify other organisations and people you work with, including details of any partnership arrangements you may have with them.

Give details of other projects you have run that were similar to this project, how successful they were and what you learnt from them.

Project background

This section should describe how the project has been developed so far. Give a clear summary of the history of your project and describe to any relevant studies or research that has been carried out.

Strategic context

This section should describe the aims and objectives of your project including:

- * the need that your project aims to address;
- * the outcomes and benefits your project aims to achieve;
- * how your project will achieve this.

You should also describe or refer to

- * the different ways that you have researched the need for this work;
- * the people that the project targets, how many people are affected, what their needs are and how you have consulted and involved them;
- * any work that other organisations or individuals have done that supports your evidence of need;
- * the options that were considered for meeting the identified need and delivering the proposed outcomes and the reasons for choosing the option proposed;
- * existing complementary or competing services or projects, which already address the needs of the project beneficiaries and how this project adds value to these services or projects;
- * any relevant links with other projects locally, regionally or nationally and how your project complements these and, if applicable, how your project benefits from being part of a larger initiative.

Project delivery

This section should include detailed information about the project and describe the services, activities and facilities it will provide. In describing these, describe the strategic context for the project. Other areas that you should cover in this section include:

- * the location(s) that the project will be delivered at;
- * the target users or visitors to the project including how many there will be and making reference to relevant market research and needs analysis;
- * the total number of people that need this project, and what percentage the project will reach;
- * a description of how the project will be open and accessible to anyone wishing to participate and how any barriers to taking part or use will be overcome;
- * how your project meets our equality principles, listed at the front of this guide.

This section should include a project plan or timetable for the non-capital elements of the project, covering all the project's activities and services, saying when they are due to happen, how frequently they will happen (for example, daily, weekly), and what you need to do in order to ensure they can happen. You may present this information in a Gantt chart. You should also include any planning and development work that may take place before the facility opens. All projects have a critical path, which is the order in which events must take place for the project to run on schedule. You should make sure the outcome milestones detailed in your application are reflected in the timetable and critical path included within the business plan.

Project resources

To deliver the project once the facility is in use you will need staff. In this section describe the staff you will need and how the project will be managed, include:

Staffing resources

- * details of the staff who will manage this project and their roles;
- * details of all the staff posts that will be created for this project including a staffing structure diagram that clearly shows existing and new posts, as well as where the project staff will fit into your organisation and the reporting lines for the project;
- * any recruitment or training plans including timescales and costs.

Management and supervision resources (organisation structure and project structure)

- * how staff, volunteers, freelance workers, consultants and other people involved in the project will be managed;
- * who will manage the project finances and what experience they have;
- * the way you currently manage your work and any new arrangements that will be put in place for this project;
- * what policies the organisation already has, and what policies the organisation will have to put in place to manage the project.

Partnership working and stakeholders

Describe what the role will be of the partner organisations involved in the development and running of your project, what the advantage of involving them will be, how you will manage the partnership, and what commitment to the project they will make. Please include copies of partnership/service level agreement(s).

Volunteer resources

Describe the role of volunteers in the delivery of the project (give the number of regular volunteers and the amount of time they will commit, and explain the tasks they will do within the project).

Financial appraisal

The financial appraisal should include details of all of the financial implications of the non-capital elements of the proposed project. The level of detail that is included within this section will vary according to the type and scale of the project.

Key considerations that should be addressed in this section include:

- * the costs of recruiting and employing staff and volunteers, operation and maintenance, overheads and other specific items of expenditure;
- * the sources of income, including where they will come from and whether the money is secured or not (these sources may come from another grant maker, a contract, from money you hold in reserve or from income that the project will generate);
- * how you have calculated any income the project will generate, including any sensitivity analysis that has been applied to your figures;
- * details of the assumptions you have made for your financial forecasts;
- * details of the assumptions you have made for the income and expenditure breakdown for any non-capital related planning and development work (to ensure the sustainability of the project) that will occur before the facility is completed;
- * any in-kind contributions; and
- * details explaining how you will pay back any money you plan to borrow to fund your project.

Financial planning

This section should include financial forecasts for at least the first five years of operation of the completed facility. The level of detail should reflect the complexity of your project but should generally be monthly for the first year and quarterly from then on. The financial forecasts should include a cash flow statement that forecasts the project's income and expenditure requirements.

This section should also include a breakdown of the income and expenditure requirements for any non-capital related planning and development work (to ensure the sustainability of the project) that will occur before the facility is completed.

Marketing and communications strategy

This section should explain what methods will be

used to publicise your work and achievements, and who the target audience is for each communication method.

Monitoring and evaluation

This section should provide a detailed description of how the project will be monitored and evaluated including:

- * the methods you will use to monitor the progress of the project;
- * how you will use the information you gather to improve the way your project is run;
- * how you will involve the project beneficiaries in monitoring the project;
- * the baselines for this work if you are already doing it;
- * any evaluation plans you have for the project, including whether you will carry out the evaluation internally or appoint a consultant (if you intend to appoint a consultant, you should tell us how you calculated any cost associated with this in your budget section);
- * how you plan to monitor the long-term impact of the project.

Risk analysis

The business plan should include an assessment of the risks associated with the project to see if there are any weaknesses and if there are any threats to the viability of your project.

There are many ways of assessing the potential risks to a project such as completing:

- * a register for your project that identifies the potential risks to your project, the likely impact on your project if the risk occurred and the ownership and management of the risks identified;
- * an analysis of your projects Strengths, Weaknesses, Opportunities and Threats (SWOT analysis);
- * an analysis of the Political, Economic, Social and Technological factors, which may impact on the environment in which your project operates (PEST analysis).

Risk analysis is most useful when the key stakeholders of a project participate in preparing it. This allows for wider stakeholder considerations to be taken into account. Once the key risks have been identified your plan should explain how these would be managed.

Include a table that lists the main risks that may affect the success of your project. This will help you plan ahead and be better prepared. For example see below:

Example

Description	Impact	Probability	Existing Controls	Action Required	Lead responsibility
Describe the risk – for example policy changes or loss of key staff	Say what the impact would be – High, Medium or Low	Say how likely it is that the risk will happen – High, Medium or Low	Explain what controls you already have in place to manage this risk	Explain what you will need to do to put controls in place or enhance existing controls	Say who is responsible for managing the risk

Supporting information

Throughout the business plan reference should be made to any supporting information, which provides key details in support of the business plan. These can be added to the business plan and may include:

- * written financial procedures for your organisation;
- * the latest set of annual accounts for your organisation;
- * organisational policies such as equal opportunities and child protection;
- * an options appraisal;
- * feasibility studies; and
- * your partnership agreement and any other relevant agreements, contracts or service level agreements.

