



# Grants Guidance Notes

War Memorials Trust

Registered Charity Number: 1062255

These Guidance Notes should be **read in conjunction** with the Application Form and the advice on [War Memorials Trust's website](#) about the grants process.

They are intended to assist you in answering the questions in the Application Form and assembling your quotes/tenders and supporting information. The detail is to help you **submit** the best possible application. **Please read** them alongside the Application Form to ensure you are filling it in correctly. Failure to provide all the information we need may lead to the charity rejecting your application – the charity cannot guarantee it will have the resources to chase missing details.

If you have a query that is not covered in these notes, you are unsure how to answer any of the questions on the form or you are finding these Guidance Notes too complicated [contact War Memorials Trust](#). Contact details can be found at the end of these Guidance Notes or by clicking the link. We encourage you to talk to us about any issues; it is better to deal with these as soon as possible than apply with missing information as your application may be rejected or delayed.

**Works cannot be funded if they have finished, already started, will start before we can make our decision or where a contractor has been appointed. If you are unsure on the status of your project, contact us to discuss.**

The Guidance Notes cover all grant schemes administered by War Memorials Trust. Funding for these schemes comes from voluntary donations, legacy gifts or contributions to the charity as well as funding from specific grant scheme supporters [Historic England](#) and [Historic Environment Scotland](#).



Historic England



HISTORIC ENVIRONMENT SCOTLAND

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## How to input information into the Application Form

The Application Form is distributed electronically as a Word document or as a paper form to be completed by hand. War Memorials Trust would prefer applications to be sent electronically as these are easier to process but will accept hard copies. If you have any problems using either type of form, or would like to request a different format, [contact War Memorials Trust](#).

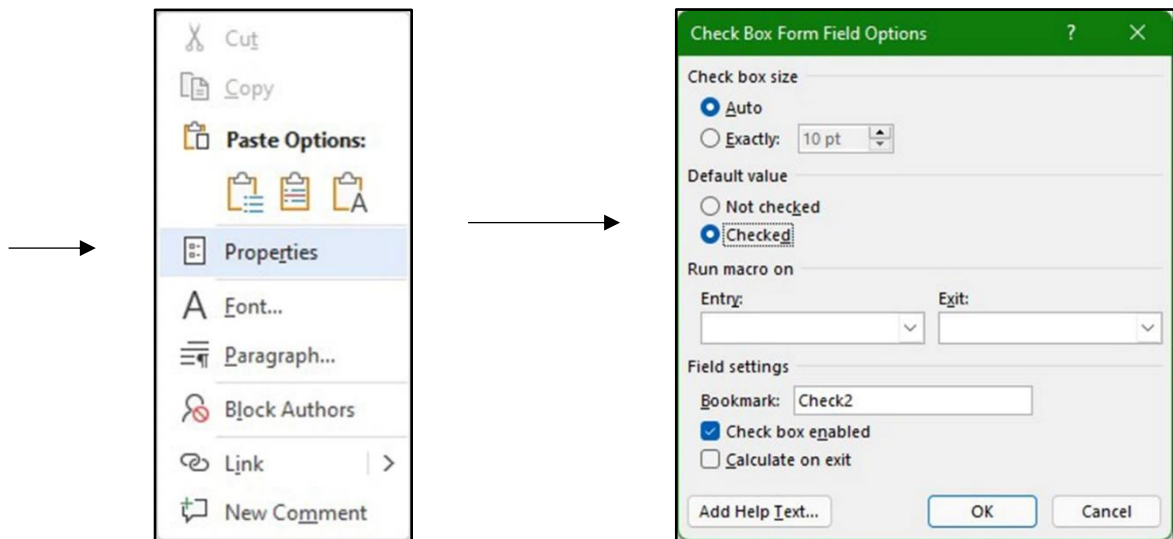
**Do not** edit the Application Form, add pages in or change the layout. We need to have the document in the same format as it is issued so we can compare all applications fairly, with all the information laid out in the same way. Submit all supporting documents as separate attachments or documents depending on whether the application is sent electronically or in hard copy.

### Completing the electronic form

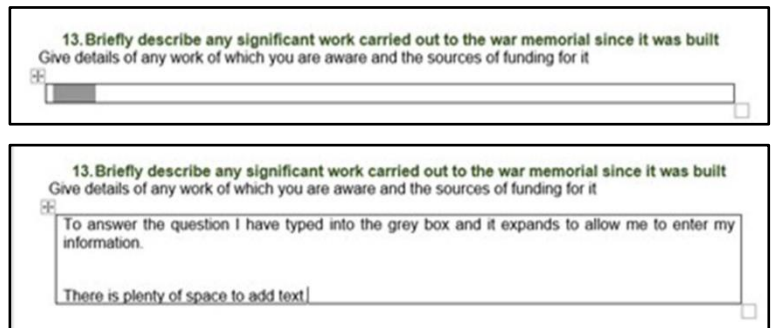
WMT will send you a Word document which works best in Office to access all the functionality.

You will need to enter data into the fields, some of which are restricted in length or formatting.

Check boxes are generally accessed by 'right clicking' on your mouse when you have highlighted the box to bring up a menu. Select Properties from the menu list and in the next menu select Checked then OK. An X should appear in the box. Check boxes look like this:  Yes  No. The steps to check are shown below:



In text boxes the small grey box indicates where to type. As you type into the grey box, it will disappear and the text box will expand to fit your text.



### Completing the form by hand

If you are completing the form by **hand**, then use **block capitals** and ensure all the information is presented clearly. Use all the space provided using additional paper - clearly marked for which question it relates to - if necessary.

## Section 1: Question 1: Who is applying for the grant?

We need to know about you as the applicant. We need the correct contact details so we can discuss your application with you and let you know the outcome.

### Types of contact

If you are applying as an **individual** the Main contact and Authorised Signatory will be the same so you only need to complete the Main contact information.

If you are applying from an **organisation** there are two possible types of contact:

- **Main contact** is the person who we will deal with on a day-to-day basis. This is who we will discuss any issues with
- **Authorised Signatory** is the person who will sign the Application Form. If an application is successful and a Grant Offer is made the Authorised Signatory must then sign the Contract and the Completion Report

If the Main contact for the grant application is

- an Authorised Signatory for the organisation making the application then you only need to provide one set of details
- not an Authorised Signatory for the organisation making the application then you need to provide two sets of details

### How we will contact you

Your email address will be the default means of correspondence for acknowledging and raising any questions about your grant application if one is provided.

We will contact you from [grants@warmemorials.org](mailto:grants@warmemorials.org). This may be tagged by your provider as Junk or Spam so make sure you check these folders. Add our email address as a safe address to prevent emails being missed.

The Trust will send any formal offer, deferral or rejection correspondence in hard copy to the postal address provided.

### 1. Applicant details

Complete the section with all relevant information:

- tell us who the organisation or individual making the application is
- confirm if the main contact is also the Authorised Signatory
- provide the details for the Main contact person dealing with the application
- if the Authorised Signatory is different provide their details

## **Section 2: Questions 2 – 13: About the war memorial**

We need to know about the war memorial. It is important we understand what it is, whether it has any protection and its history to make informed decisions when assessing your application.

We must be aware of the legal status of the memorial and that you have any required permissions in place. It is also important to understand the context of the memorial and the original decisions about the war memorial's design, features, inscriptions etc. made by those who erected it. Whilst these do not necessarily have to be followed it is important that the intentions and desires of earlier generations are understood, respected and used to inform decisions.

### **2. Reference information**

It is important for War Memorials Trust to be sure we have identified the right war memorial:

You must confirm the War Memorials Online reference number. This will be on your Grants Pre-application response email or letter. It will look something like WMO/123456.

You should ensure details of the memorial are up-to-date on the War Memorials Online website, [www.warmemorialsonline.org.uk](http://www.warmemorialsonline.org.uk). Enter your reference number in the search box to locate the record and check the information.

Ensure that you add a Condition update then enter the date you did it on the Application Form. The Condition update is your assessment of condition when submitting your application. It does not have to be provided by a professional. For advice on adding Condition updates, see <http://www.warmemorialsonline.org.uk/faq>.

If you cannot add a condition report to War Memorials Online, explain why on the form. This may be the case if you do not have access to a computer.

### **3. Name and location of the war memorial**

Enter the name of the memorial and its address details. If the memorial is within a building or a larger site then include location details in the address section e.g. 2<sup>nd</sup> Floor, Chapel etc.

### **4. Briefly describe the appearance and setting of the war memorial**

You should provide a short summary of what the memorial looks like and its surroundings. Include information on the materials it is made from highlighting if it has any metal elements

For example:

- stone cross with lead lettering in the churchyard of St Mary's standing under trees alongside gravestones
- granite stone of remembrance with polished granite surface for inscription with lettering carved into the stone. It is located at the roadside in a small garden in the middle of the village
- brass plaque in the Nave of the Church of St Francis
- timber bench located in the public park with a small metal plaque carrying a name

It is important to mention any metal elements on the memorial such as lead lettering, metal crosses, fixtures or fittings.

### **5. Name of local planning authority (unitary, district, city or borough or area council)**

You should enter the name of the local planning authority. This will be the local authority or council which assess planning applications for the area in which the war memorial is located.

### **6. Do you know who owns / has responsibility for the memorial?**

You should indicate which of the options describes your current position.

If you do not have legal responsibility for the memorial, you **must** include a letter from the owner giving you permission to undertake this project and indicating their willingness to provide public access. If the owner will not give their permission, then it will not be possible to provide a grant. This is because War Memorials Trust cannot support works which are not agreed by the owner.

If the ownership is unknown, you **must** include a statement explaining what steps you have taken to establish ownership. These could include checking with your local authority, carrying out local land registry searches and advertising in the local press or on social media.

Ownership of war memorials can be difficult to establish as the majority were funded by public subscription. However, there may have been a formal transfer of ownership or deeds for the memorial that establish the owner/custodian. This type of information is likely to be held locally. See War Memorials Trust's helpsheets on '[Ownership of war memorials](#)' and '[Researching the history of a war memorial](#)'.

### **7. Is the war memorial accessible to members of the public?**

You should ensure that there is reasonable public access to the war memorial or that there will be after the project has been carried out. As public money may be used to support a Grant Offer it is important that the public, especially relatives of those commemorated, can visit.

Many war memorials are, because of their location, always accessible. Others are harder to access especially if located internally. As a minimum the memorial should be available to visit once a year. Other sources of funding may have alternative minimum requirements. For example, the [Memorial Grants Scheme](#), which can provide VAT relief for certain groups, will require a minimum of 30 hours public access a week. There should also be opportunities for people to pay their respects free of charge so if there are any fees required to access a war memorial then provide details of how someone may visit the war memorial to pay their respects without incurring a financial charge.

Information on access should be added to [War Memorials Online](#) so people are aware. If the memorial is currently not accessible, explain how you will provide access if you receive a grant.

### **Questions 8 - 10**

The following questions can require research and advice is provided about how to do this in each section. You may also be able to obtain further information from the Conservation Officer or Planning Officer at your local planning authority or [War Memorials Trust](#).

### **8. Is your war memorial a freestanding structure?**

You should select whether your memorial is freestanding or not.

- a freestanding memorial is a self-supporting structure such as a cross, cenotaph or lychgate
- freestanding memorials are not fixed to another structure so a plaque attached to a wall, a window, or a clock on a tower would be considered non-freestanding

## 9. Is the war memorial a functional building, part of another building or a financial asset to its owner?

If a war memorial falls into one of these categories, it will only be eligible for certain grant schemes. It does not impact upon the ability to obtain a grant it will just influence which grant scheme War Memorials Trust can assess your project under.

Select yes, to ensure we appropriately consider your project, if your war memorial is a

- functional building e.g. a memorial hall, bridge or hospital
- part of another building e.g. a chapel within a larger church, an entrance foyer
- financial asset to its owner e.g. a memorial building which is rented out such as a Hall

## 10. Designation

### a. Is the war memorial designated?

If a war memorial is designated it means it has been added to the statutory list which is managed by the relevant national heritage organisation. Consents may be required for certain works.

Each national heritage body is responsible for identifying sites of national importance and designating them to offer protection. The type of designation applied will depend on the type of heritage asset. Descriptions vary slightly between the national heritage bodies but for war memorials the commonest forms of designation are:

- Listed Building – buildings of architectural and historic interest
- Scheduled Monument – nationally important sites and monuments
- Registered landscape – parks, gardens and battlefields

You **must** tell us if your war memorial is designated so we can deal with the permissions discussed in Question 17. You should find out the reference number and the grade or category. If you do not know whether your memorial is designated then search using the appropriate link:

- UK: [www.gov.uk/scheduled-monument-consent-england-scotland-wales](http://www.gov.uk/scheduled-monument-consent-england-scotland-wales)
- England: National Heritage List for England managed by Historic England <https://historicengland.org.uk/listing/the-list>
- Northern Ireland: Department for Communities databases [www.communities-ni.gov.uk/services/buildings-database](http://www.communities-ni.gov.uk/services/buildings-database) or [www.communities-ni.gov.uk/articles/scheduled-monuments](http://www.communities-ni.gov.uk/articles/scheduled-monuments)
- Scotland: Listed Buildings Search managed by Historic Environment Scotland [www.historicenvironment.scot/advice-and-support/listing-scheduling-and-designations/](http://www.historicenvironment.scot/advice-and-support/listing-scheduling-and-designations/)
- Wales: Cadw's <http://cadw.gov.wales/historicenvironment/recordsv1/?lang=en> or <https://cadw.gov.wales/advice-support/historic-assets>

Alternatively, there are other databases and records available online and your local planning authority should have details of listed buildings and monuments in the area.

Local authorities can also hold their own local lists of assets which are deemed as important for the local community but are not nationally designated. This means the local authority will consider these in their local planning policies. If your war memorial is on a local list provide details. If your war memorial is not on a local list you may want to contact your Local Planning Authority and ask them to add it. Whilst this does not provide any additional legal protection it does ensure the war memorial is locally recognised as important. For further information on Local Listing see <https://historicengland.org.uk/listing/what-is-designation/local/local-designations/>

### **b. Is the war memorial part of the fabric or curtilage of a listed building?**

The curtilage of a building is often defined by the property boundary (although individual cases vary). Any war memorial which was within the curtilage of a listed building prior to 1<sup>st</sup> July 1948 is automatically included as part of the listing for the building unless specifically excluded. This means Listed Building Consent may be required.

For example, a cross in a churchyard may not be listed in its own right but if the church is listed it may be deemed to be part of the curtilage. Similarly, a marble plaque in a listed building is extremely unlikely to be individually listed but it may be seen as part of the main building or its fabric and therefore treated as listed.

You can follow the links in Question 10.a above to find out if the memorial is in or near a listed building and include this on your application. Your local planning authority can advise on this as it is their job to interpret the extent of curtilage/fabric.

### **11. Is the war memorial in a conservation area?**

If a war memorial is in a conservation area, it means it is within an area designated as being of 'special historical and architectural interest, the character or appearance of which is desirable to preserve or enhance'. This means that certain works may be controlled and will require permission from the local authority.

If you do not know whether your memorial or site is in a conservation area, then in:

- UK: [www.gov.uk/apply-work-home-conservation-area](http://www.gov.uk/apply-work-home-conservation-area)
- England: contact your local planning authority or <https://historicengland.org.uk/advice/hpg/has/conservation-areas/>
- Northern Ireland: visit NIdirect [www.nidirect.gov.uk/conservation-areas-and-advice](http://www.nidirect.gov.uk/conservation-areas-and-advice)
- Scotland: [www.historicenvironment.scot/advice-and-support/your-property/owning-a-traditional-property/living-in-a-conservation-area/](http://www.historicenvironment.scot/advice-and-support/your-property/owning-a-traditional-property/living-in-a-conservation-area/)
- Wales: <http://cadw.gov.wales/historicenvironment/help-advice-and-grants/makingchanges/conservation/?lang=en>

### **12. Provide information on the history of the war memorial, including the name of its designer, sculptor and/or builder and its date of dedication**

We need this information to understand the background and context of the memorial. It is important to have details of the name of the architect or designer, sculptor and builder of the memorial as well as its date of construction and dedication, if these are recorded. For example,

- it may have been designed by a prominent architect which could affect decisions about its treatment
- it may have used specific building skills or construction techniques of a particular time period which help us understand appropriate treatments

Often, historical information will support your application no matter how big or small the project is. For example,

- showing that inscriptions were originally painted and require re-painting as this has been lost
- confirming the type of stone the memorial is made from to ensure appropriate stone repairs or cleaning methods are used
- when re-instating missing elements, early photographs and original plans will provide a model for replica designs

You may be able to find

- original design drawings
- council/amenity association/church minutes discussing the planning or design of the memorial
- newspaper reports of the planning or unveiling
- historical photographs or postcards which are particularly useful for understanding the memorial over time

War Memorials Trust recognises it can be **difficult** to find information in some cases. You should **state all sources** searched, including online checks, even if they yield no information.

Sources of information or guidance may include

- your local community – members of the community are likely to have information and often the local media will be interested in a story and can perhaps encourage people to send you information
- your local library or research centre – may have copies of newspapers with details of unveiling or dedication services
- your local history or family history groups – may have information or volunteers willing to help you undertake some research
- War Memorials Trust's helpsheet on [Researching the history of a war memorial](#)
- War Memorials Online [www.warmemorials.org.uk](http://www.warmemorials.org.uk)
- War Memorials Trust's links section highlighting local research projects [www.warmemorials.org/links](http://www.warmemorials.org/links)
- IWM's War Memorials Register [www.iwm.org.uk/warmemorials](http://www.iwm.org.uk/warmemorials)
- Historic England Archive [www.historicengland.org.uk/images-books/archive](http://www.historicengland.org.uk/images-books/archive)
- Historic Environment Scotland Canmore <https://canmore.org.uk>
- other websites for your area or with a particular research interest

### **13. Briefly describe any significant work carried out to the war memorial since it was built**

We need to understand as much as possible about the history of the war memorial including any previous works undertaken to it. If you are aware of any works, include details. This can inform decisions we make about how to treat the war memorial. It is also helpful to know the costs of any previous work and how this was funded.

If you are unaware of any works, indicate what research you have done to find out about this. This information is likely to be held by the war memorial custodian/owner. It is important that you provide evidence to War Memorials Trust of your efforts to find out this information.



## Section 3: Questions 14 – 18: Project proposal – what works

### 14. Briefly describe the background to your project. Why is it needed?

We are interested in what is driving your project. We do not decide applications according to the level of community support, but the information can help us understand proposals better. Grants are given to necessary repair and conservation works and those war memorials in greatest need are given highest priority. Provide brief details, for example, you, or your community/organisation, think:

- the condition of the memorial is Poor or Very bad and/or health and safety risks
- the names are getting hard to read
- a relevant anniversary feels like a good time to address the condition of this war memorial
- as a local resident recently lost their life in conflict and their family wish to add a name this is a good time to undertake wider conservation works

### 15. Provide a summary of the work proposed and explain why it is necessary

We need to know what you are looking to do. This question is your opportunity to explain what work you propose to carry out and explain why you think they should happen. In most instances this will have been discussed as part of your Grants Pre-application so remember to re-read that response to make sure the works you are proposing are eligible. As a conservation charity War Memorials Trust will expect any work proposed to be in-line with best conservation practice. You need to show that the works are the minimum necessary to resolve the problems you have identified and fit within the funding criteria for a grant, see [What we can and cannot fund](#). Failure to provide an adequate project proposal will cause your application to be deferred or rejected.

You are not expected to write any technical information here as this should appear in the quotes/tenders or other documents such as architect's specification or conservation report.

If you wish to include fees for a conservation-accredited professional adviser (e.g. an architect, chartered architectural technologist or surveyor) explain what their role will be in the project and any reports/specifications they will produce.

You **must** ensure that any advice provided in response to your [Grants Pre-application form](#) has been taken on board – resubmitting inappropriate works which you have been advised were ineligible previously will lead to your application being rejected. Also, if the works have changed since the Grants Pre-application it is recommended that you contact us before applying to ensure what you are proposing is eligible.

If you are unsure of any of the advice or guidance provided in response to your Grants Pre-application form then you should [discuss this with War Memorials Trust](#). You should also ensure you have read all correspondence and helpsheets and ensure your contractors understand that works **must** follow best conservation practice.

### 16. Rate your understanding of the term 'best conservation practice' and the principles it covers?

This question helps us identify your level of knowledge around best conservation practice. These are the principles that underpin the type of work eligible for support. This will help us communicate with you and provide appropriate levels of advice. The range of literature available runs from basic through to professional so it will help us to help you if we have an idea of your level of understanding.

Our [Conservation Principles](#) helpsheet outlines best conservation practice.

### **17.If the war memorial is listed, scheduled, in a conservation area or within a church you may need consent. Has this been obtained?**

We need to know that works to be undertaken are legal and permitted. This relates to Questions 8 – 10 above.

If you are unsure whether these consents are required, you should contact the local planning authority or the relevant church authority if the memorial is located in a church or churchyard.

If you have started any processes, provide reference numbers if known so War Memorials Trust can access any background information.

If you have obtained consent, you should include copies of documentation relating to permission for the proposed work (e.g. Listed Building Consent, Conservation Area Consent, Scheduled Monument Consent, Planning Permission, Faculty or other ecclesiastical permission) with your Application Form. The Church of England provides [guidance](#) on the Faculty process. Equally if you have contacted the relevant body and have been advised that consent is not required then supply evidence of this.

You do not have to obtain the consents before making an application but you **must not** start works without them. If you already have the consents before making this application, it can help speed things along as War Memorials Trust is then aware that the proposed works can legally be undertaken. Be aware that War Memorials Trust conditions may differ from Listed Building Consent permissions but the charity can discuss these with the Local Authority if any problems arise. If consents are applied for after a Grant Offer this may delay your project.

Some projects will require the relevant statutory consents or guidance from your local authority, Diocesan Advisory Committee or equivalent to be submitted with your application. Such projects include, but are not exclusive to, relocation, electrification of bells, organs and clocks and alterations or additions to listed memorials. War Memorials Trust will seek to provide this advice at Grants Pre-application stage.

### **18. Confirm you will submit good quality recent colour photographs of the war memorial**

You **must** provide a **set of good quality recent colour photographs** of the war memorial. We cannot visit every war memorial. Therefore, we will rely on the photographs you provide to assess your application. Applications submitted without good quality recent colour photographs will not be considered.

Even if you provided photographs and images at Grants pre-application stage as the assessment is different it is helpful to have these sent at this stage. If you sent images more than 3 months ago, send an up-to-date set with your Application Form.

#### **What to photograph**

You **must** show the war memorial:

- in its wider setting i.e. we need to see the environment it is in. Make sure it is clear if it is, for example, underneath trees, by a roadside, near a window or above a radiator
- as a whole
- each side or 'elevation' - if it has them
- close-ups of areas to be repaired or conserved – if we cannot see the problem, we cannot fund it. For example, we need photographic evidence of open joints, weathered inscriptions or cracks
- the full inscription and/or names

If an application is for reinstatement of any lost features, older photographs showing the original appearance of the memorial are vital; we cannot support reinstatement if there is no evidence of what was originally there.

See War Memorials Trust's [advice](#) on taking a good set of photographs and read our helpsheet on [Photographing war memorials](#).

### **How to send photographs**

Digital versions of photographs are preferred.

Make sure you are clear who has the copyright for the photographs. It will be assumed to be the applicant if we are not notified otherwise.

When signing this Application Form, you will be giving War Memorials Trust and other organisations permission to use these photographs so if you are not the copyright holder ensure that you get their permission.

### **Do not**

- put photographs into a Word or pdf document – we need separate digital files to enable us to zoom in on the detail
  - if you want to create a document with notes about condition etc this can be sent as well as the photographs but not instead of
- print photographs on plain paper at A4 or similar size
  - the quality is not good enough once we have scanned them

### **Photographs can be sent**

- by email to [grants@warmemorials.org](mailto:grants@warmemorials.org)
  - you may need to send photographs over more than one email as we recommend emails are not bigger than 15MB in size
  - you must include the reference number in the email to enable us to match the photographs to the application
- via a sharing website such as Dropbox, WeTransfer etc.
  - you must include the reference number in any notification to enable us to match the photographs to the application
  - make sure you give us enough time to download these if there is a time limit – we need at least 2 weeks
- on a CD/USB
  - you must include the reference number in any covering letter to enable us to match the photographs to the application
- via War Memorials Online by adding the photographs to the record or by submitting a Concern report
  - however if you are sending a lot of images this may not be appropriate
- as a hard copy
  - preferably on photographic paper at a normal 7x5 or 6x4 size
  - do not mark or write on the front of the photographs directly in any way or attach stickers. If you wish to do this, or if you think it will be helpful, then do so on an additional copy.
  - You should write the name of the copyright holder for each photograph clearly on the back, this is usually the person or organisation who has taken the photograph

## Section 4: Questions 19 – 21: Project costs

### Finding a Contractor

Quotes or tenders **must** be obtained from independent contractors or conservators with specialist knowledge and experience of conservation projects. Quotes must be from unrelated separate companies, not different trading arms of the same company, nor different companies in the same group. War Memorials Trust **does not** approve any specific contractors so if anyone tells you they are 'approved' this is wrong; they may have worked on projects previously funded by the charity but this does not mean they are approved. The Trust is focused on the works being undertaken not who does them.

If your project has a total project cost of over £10,000 (£20,000 in Scotland) you will need to have a conservation-accredited professional advisor involved, for example a conservation-accredited architect or structural engineer.

War Memorials Trust has advice on [finding contractors](#) which includes registers for conservation-accredited professionals. You should ensure you read this in conjunction with the other advice on procurement to help you find a suitable individual or company to undertake works.

When getting a quote ensure it:

- has a date of issue on it
- indicates how long it is valid e.g. 3 or 6 months. This is important if prices are unstable
- clearly identifies the contractor i.e. company name and registration number, letterhead etc.

### Comparable quotes or tenders

Quotes or tenders need to show **comparable works** so it is clear what works you are proposing to do. This means the **works quoted for need to be the same**. For example, a quote for works to clean a war memorial which is similar in price to a quote for works to sharpen and deepen the lettering would not be seen as comparable because the proposed works are completely different. We need to see comparable costs for the same type of work.

Quotes or tenders should also itemise the cost of each element of the work. For example, a quote to clean, re-point and sharpen and deepen lettering should show the price for each separate item separately along with a total price for the works.

For larger projects involving a conservation-accredited professional advisor they will draw up a specification of works for the project. A tender process will then be undertaken which will see all contractors tender against the same specification of works.

### Detail

Quotes should provide enough detail on the works being proposed. Just writing 'clean' is not sufficient as there are lots of different ways to clean a war memorial some of which can be damaging.

Ask anyone quoting for works to specify how they will do the works not just what they will do. Make sure they are clear about any materials they propose to use.

For example:

- how will they clean – by hand clean or with steam
- what type of mortar is proposed – we would expect to see lime proposed or a mortar mix to be included

## Project costs

As many of the grants awarded by War Memorials Trust involve public money (e.g. from government, local authorities etc.) it is essential that value for money can be clearly demonstrated and the processes used to select a contractor or conservator are non-discriminatory, transparent and proportional to the contract being offered. This is especially important where public money represents more than 50% of the total project costs as these are deemed 'subsidised contracts' which means that they are treated as if they were public contracts.

War Memorials Trust has provided extensive guidance on this and all applicants **must** read the relevant documentation as part of their application to ensure you are appointing contractors fairly.

In normal circumstances projects which cost:

- **under £5,000** anywhere in the UK will need **two comparable quotes** as explained in
  - [Procurement - Getting quotes and finding the right contractor or conservator](#)
  - [Appendix A: Total project cost less than £5,000 \(exc. VAT\)](#)
- **between £5,000 and £10,000** in England, Northern Ireland and Wales or **between £5,000 and £20,000** in Scotland will need **three comparable quotes** as explained in
  - [Procurement - Getting quotes and finding the right contractor or conservator](#)
  - [Appendix B: Total project cost between £5,000 and £10,000 \(£20,000 in Scotland\) \(exc. VAT\)](#)
- **over £10,000** in England, Northern Ireland and Wales or **over £20,000** in Scotland will need **three tenders** and the project will need to **involve a conservation-accredited professional advisor** as explained in
  - [Procurement - Getting quotes and finding the right contractor or conservator](#)
  - [Appendix C: Total project cost over £10,000 \(£20,000 in Scotland\) \(exc. VAT\)](#)

## Multiple elements of a project

If your project involves multiple works and different contractors for different elements then you may wish to complete a version of Section 4 for each element of the project. If you have an electronic version of the form, you can save different copies and name them for the relevant part of the project e.g. Application Form and Application Form for metalwork. On the additional copies you only need to complete the sections relevant for the extra works. If you are unsure how to deal with this [contact War Memorials Trust](#).

## Free/Discounted/Voluntary materials or labour

Occasionally, war memorial projects may be offered free or voluntary labour or materials towards projects which can potentially reduce costs.

If you are submitting a grant application and one or more of your contractors has offered to undertake some of the works at a discounted or free rate or offered to provide materials more cheaply this can make comparable quotes more difficult. However, in order to enable assessment of such quotes or tenders:

- a proper quote or tender should be submitted
  - it should list all the itemised bits of work with the relevant price alongside with anything being provided free listed as £0
  - alternatively, if a reduction is being given on total price, then the itemised list should be subtotalled and the final total price quoted should be the reduced price

This will ensure the actual cost of works is clear and the proposed reductions are obvious.

## 19. Provide below the details of your selection process, the comparable quotes or tenders for the proposed works and your preferred contractor

We need to

- understand how you have chosen your contractor
- see the details of the quotes or tenders
- see details of how you have fairly selected your preferred contractor

### a. How did you select your contractor?

We need to know whether you chose your preferred contractor solely on Price or if you used a Price/Quality assessment. You will need to have decided which approach to take before you seek quotes/tenders and to have made this clear to contractors invited so that they have a fair chance to understand how you were making your decision.

Price/Quality assessments **require** that you provide the spreadsheet you have used to compare the price and quality along with the evidence of how you ran a fair and open process to obtain your quotes. You **must** show you started with a Price/Quality assessment and that contractors were aware you were assessing on both price and quality. You **cannot** add a quality judgement **after** receiving quotes to make a decision if you have not told those quoting that anything other than Price will determine the decision – it is not fair. Unless you demonstrate that you followed all the guidance to undertake a Price/Quality assessment, War Memorials Trust will have to look at your application as following a Price only approach.

The **criteria** for Quality are determined by you but they must be applied consistently. For further information on how to select a contractor you should read War Memorials Trust's helpsheet [Procurement - Getting quotes and finding the right contractor or conservator](#) and the relevant Appendix depending on the cost of your project. If you have any questions about selecting your contractor then [contact War Memorials Trust](#) to discuss this.

### b. Is a conservation-accredited professional advisor involved in the project?

You will need to involve a conservation-accredited professional advisor if your project

- costs over £10,000 in England, Northern Ireland and Wales or over £20,000 in Scotland, or
- is unusual, complex or difficult and you and War Memorials Trust has agreed that professional advice would be beneficial

Where professional fees are expected to be under £1,000 one quote would be acceptable but we recommend that you get at least three quotes for professional services. This is to ensure best value for money and demonstrate that a competitive process was undertaken to select the appropriate adviser. Include a copy of any quotes with this application. [Contact War Memorials Trust](#) for further guidance.

If you wish to include the fees in your application, detail in **Question 15** what role the conservation-accredited professional adviser will have in the project and any reports or specifications they will be producing. If the application is successful and professional adviser fees are included in the Grant Offer, you will need to submit a copy of their invoice for this work when you come to claim the grant and provide evidence of their role, such as reports or certifying works.

Enter the details of the professional adviser and the proposed costs. The type of professional adviser **must** be relevant to the project and you can [contact War Memorials Trust](#) to discuss this.

**i. Do you wish for these fees to be included as part of your project costs if they are eligible?**

Confirm whether you wish these costs to be included as part of your project costs.

**ii. Confirm the conservation-accreditation is for the individual professional advisor working on your project**

It is important that the specific individual working on your project is conservation-accredited, not just their company. If you are working with an organisation, it is not enough for the organisation to have some conservation-accredited staff if they will not be working on your project. If you are unsure about this then [contact](#) the Trust to discuss.

**iii. Have you previously received a Professional Advice Grant via War Memorials Trust related to this war memorial?**

Confirm if you have previously received any funding from War Memorials Trust towards the costs of professional advice in relation to this war memorial. War Memorials Trust will not pay for the same works twice, as the charity has limited funds, so it is important to be aware whether previous funding has been provided.

**c. Details of all the comparable quotes and tenders obtained for works to the war memorial**

Enter the details of the quotes or tenders received. The [advice](#) at the beginning of this section explains how many quotes or tenders you need to provide.

Include copies of these documents with your Application Form as War Memorials Trust will need to see these.

Fees from contractors for providing you with quotes are not eligible for grant funding.

Make sure to include the Company number if the company has one. This will need to be unique to each company providing a quote/tender. You cannot submit quotes/tenders from different trading branches of the same company.

**d. State your preferred contractor**

Enter the name of your preferred contractor.

If you are selecting based only on Price this **must** be the cheapest contractor. If you are selecting using a Price/Quality assessment this will be the highest scoring contractor based on the criteria you decided at the start. See the details above on [Project Costs](#) or [contact War Memorials Trust](#) to discuss if you are unsure.

**e. Is VAT likely to be recoverable, zero-rated or covered by a separate grant on any part of the work?**

The grant schemes do not include VAT costs if they are otherwise covered. You will need to explain if you or the organisation you are applying for can reclaim the VAT or if it will not be charged or if it will be covered by a separate grant.

Work to existing fabric is usually subject to VAT. [The HM Revenue & Customs VAT Notice 708: buildings and construction](#) is a useful guide. War Memorials Trust cannot provide any further advice than this on VAT as we are not tax experts.

It is assumed

- all local authorities will be able to reclaim VAT unless the applicant explains otherwise (except for Community Councils in England or Scotland)
- charities and faith groups exempted from registering as charities (such as Parochial Church Councils) will apply to the [Memorials Grant Scheme](#) for a grant to cover the VAT
- all other groups will incur VAT unless otherwise stated

If you are later able to recover the VAT or receive a separate grant specifically for the VAT, you will have to repay the relevant amount of grant.

**f. Any additional information relevant to project costs to be provided**

Enter any further information you believe relevant to your application and its costs.

**20. Have you applied to any other sources of funding for your project?**

We need to know if you have any other funding in place for your project. A Grant Offer from us must not lead to you receiving more than 100% of project costs in total.

Select Yes or No and answer the further questions as relevant.

**a. Give details of the funding body, the amount of grant you applied for and whether your application was successful**

List any other funders applied to, how much you are requesting and the status of your current application.

If you are a registered charity or a faith group exempted from registering as a charity, include the [Memorials Grant Scheme](#) (see **Question 19.e** regarding VAT recovery).

**b. If you have not applied to any other sources of funding, or are not successful obtaining other funding, indicate how you propose to fund the project.**

If you have an allocated budget for the war memorial enclose details. You should advise whether the project can proceed if funding is not forthcoming from this application. Be aware the Trust offers grants at 'up to' certain levels and it cannot be guaranteed that any funding will be available.

**c. Grant Offers are not paid until the applicant has submitted a Completion Report for the project and it has been assessed to ensure works have been undertaken in-line with best conservation practice. Are you able to cover the cost of your project if payment is required before the grant payment has been issued?**

War Memorials Trust will need to receive and assess your Completion Report to ensure works have been completed in-line with the Contract and Method Statement before a grant payment is made. The charity aims to do this within 3 weeks of having received a full Completion Report with all the required information. However, at busy times it can take longer.



As such you, and if applicable your organisation, should ensure you are aware of the payment terms for any works undertaken. No work should be contracted before you receive a decision on your grant application. But once you started commissioning work contractors may seek deposits or staged payments especially if they have to purchase materials or other outlays.

In exceptional circumstances War Memorials Trust may consider staged payments for projects to groups for whom the costs of the project are significantly larger than their normal financial transactions and activity, or those whose financial position does not allow them to carry such costs through to the completion of the project. This would need to be discussed with War Memorials Trust under the [Staged payment policy](#).

**d. For war memorials in England and Scotland confirm that no other funding for the project will be from Historic England, Historic Environment Scotland (or other Scottish Government sources)**

Historic England, Historic Environment Scotland or the Scottish Government cannot fund a war memorial project from more than one funding stream so confirm you do not have any other funding from these sources.

**21. How much of a grant are you asking for under this scheme?**

You **must** enter a number for the amount of money and a percentage for the percentage requested. Grants are normally considered up to 50% of the eligible costs with the normal maximum grant being up to £20,000.

To calculate 50% take your lowest total and multiple by 0.5. See the examples below:

If you pay VAT:

Lowest quote for works	£1000
VAT	£200
Total	£1200
Grant amount requested (1200 x 0.5)	£600
Grant %	50%

If you do not pay VAT:

Lowest quote for works	£1000
VAT	£0
Total	£1000
Grant amount requested (1000 x 0.5)	£500
Grant %	50%

Occasionally larger grants may be possible but these are at the discretion of War Memorials Trust.

For help on finding other sources of funding see War Memorials Trust's [Fundraising for war memorial projects](#) helpsheet.

## Section 5: Questions 22 – 24: Promoting your project

### 22. Provide a short quote which describes what a grant would mean for your project

You should provide a short quote which may be used to promote your project if you receive a Grant Offer. This may be used as part of a news release to help promote both your project and the grant schemes.

For example,

- “Works will ensure our war memorial is repaired to mark its centenary, as it was erected 100 years ago”
- “Conserving our war memorial will ensure it is a place for villagers to pay their respects and remember the fallen”
- “Repairing our war memorial will bring the community together and allow us to explain to young people what it is and why it is important”

You should ensure the person whose name is provided in the ‘By’ field is aware they have been quoted if this is not you.

### 23. Do you intend to promote or publicise any grant offered?

It is useful to know if you plan to undertake any promotion or publicity around your project as War Memorials Trust may be able to assist with this.

### 24. Do you intend to hold a rededication service once the works being proposed are completed?

It is not necessary to hold a rededication service but if you do hold an event War Memorials Trust would appreciate receiving details. Further information on rededication services can be found on War Memorials Trust’s helpsheet [Dedication and rededication ceremonies](#).

## Section 6: Questions 25 – 27: Public engagement

This section is designed to obtain some wider background about your project. Select the relevant options.

If you would like any further information about any aspects of the Trust’s work, let us know.

## Section 7: Declaration

You **must** complete all the parts of this section. If any of the information is not completed the application cannot be accepted.

War Memorials Trust will need the Declaration to be **signed by hand by the Authorised Signatory:**

- if you are completing the Application Form electronically then you should print a copy of Section 7, sign it and either scan a signed version of the page and send via email with your completed Application Form as an additional document or post the page to War Memorials Trust
- if you are completing the Application Form by hand you should just sign Section 7

Remember, if an offer is made, the Authorised Signatory must sign all subsequent documents related to the application including, the Contract and Completion Report. War Memorials Trust will compare signatures through the process hence why the Application Form must be signed by hand. Should the Authorised Signatory change at any time War Memorials Trust will require written confirmation. Details of how to do this are provided with the Grant Offer paperwork.

Signing the Declaration means you have read and accept the statements below:

- Freedom of Information

Some of the grant scheme supporters are subject to the Freedom of Information Act 2000 and the Environmental Information Regulations 2004 which provide a general right of access to information. They may provide the information you have supplied and which we in turn may have provided to them in response to a request made under this legislation, subject to any exemptions which apply. They will consult with external parties as necessary prior to releasing information.

- Data Protection Act 1998

We will retain your personal details, along with the other information you have provided and information obtained from other sources, under the principles of the Data Protection Act 1998. We may disclose such data if we are required to by law.

## Section 8: Returning the form and War Memorials Trust contact details

**Electronic submissions are preferred** as these can be processed more quickly. If you are sending electronically, then Section 7 with the Authorised Signature can be scanned and sent via email with your completed Application Form.

All post should be sent to the London office to be processed before being passed to one of the Conservation Officers. Conservation Officers work remotely but all grant administration is done in London. Sending post to any other address will cause a delay in processing and may result in you missing a grant deadline.

If you have any questions about the application process, or to return your Application Form, please contact:

[grants@warmemorials.org](mailto:grants@warmemorials.org)

020 7233 7356 / 0300 123 0764

[www.warmemorials.org/grants](http://www.warmemorials.org/grants)

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