

CASE STUDY

HERITAGE LOTTERY FUND

HERITAGE LOTTERY FUND MOVES FORWARD IN PRESERVING THE UK'S PAST



The Heritage Lottery Fund (HLF) was set up by Parliament in 1994 to distribute a share of the money raised by the National Lottery to projects involving the local, regional and national heritage of the United Kingdom.

It currently allocates grants totalling around £255 million a year, and has awarded some £4 billion to more than 26,000 projects across the UK since it was established.

THE CHALLENGE

A key task of HLF is to help groups and individuals looking for funding for projects to prepare applications that will have the best possible chance of success when presented to the committee that awards grants.

That means the project should meet the Fund's various objectives, as well as be designed to successfully achieve its own aims. However, HLF realised that these goals weren't best served by its existing paper-based application process.

THE SPECIFICATION

"Applications often arrived in the form of boxes of documents that people had clearly spent a lot of time and money compiling, but which were often more than they needed to provide for the first stage of the application," explains Gary Castle, HLF's Head of IT and Facilities.

"Some of those carefully compiled applications were for projects that simply didn't meet our funding criteria. We saw that by putting the application process online, we could get applicants to fill out a standard initial 'pre-application' form that

would provide a brief outline of the project and allow them to tell us their story in a way that's consistent from applicant to applicant."

"Using that pre-application, we could then let applicants know more quickly – and before they've invested a lot in creating an application – whether it's likely to succeed. We can also start talking to them earlier about what detailed information they need to provide next, or what changes they could make to their project so it does meet the criteria for funding."

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GARY CASTLE
HEAD OF IT AND FACILITIES, HLF

UNIQUE REQUIREMENT. UNIQUE SOLUTION.

HLF had a vision of what it wanted to achieve and therefore looked for a partner that would work with it to provide proof-of-concept prototypes for the online application process, promote them to the various stakeholders within HLF, and use their feedback to develop the online application process further.

"We wanted to allow the business to see how online services might work, and to be able to expand and develop functionality easily," Castle explains.

HLF considered a number of solutions and chose Toplevel's GrantsOffice after seeing the work Toplevel had done with a number of high-profile organisations.

"We wanted a supplier who would partner with us over the long term, to help us grow our ideas and implement them in a modular and agile fashion. Toplevel has been very flexible and supportive, and their partnership has helped us get as far as we have as quickly as we have."

SUCCESS

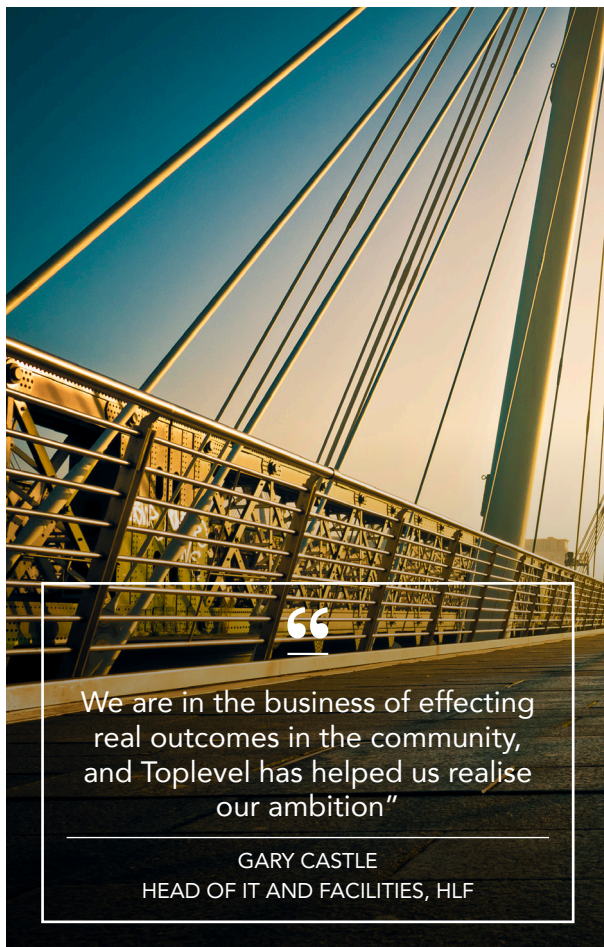
Working closely with Toplevel, HLF has now created a portal that supports online applications for HLF's programmes, as well as secure two-way communications.

Through the portal, applicants can fill out the one-page 'pre-application' form, before moving on to slowly building up the information in their full application as they gather data or respond to suggestions and requests from HLF staff.

Once a grant has been approved by the relevant committee, HLF then uses the portal to continue to

communicate with grant recipients – providing the permission to start online, for example – and to monitor projects, getting recipients to submit project updates online.

"Some of our major restoration projects can last many years, so a portal that is fully transactional, providing a two-way flow of information during the term of the grant is essential," Castle explains.



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ONGOING BENEFITS

The flexibility of GrantsOffice is demonstrated by the variety in the programmes it supports: from the Young Roots programme that provides grants of between £3000 and £25000 to community projects run by young people, to Heritage Grants, which funds major capital projects such as the multi-million pound restoration of the Cutty Sark.

"The ease and speed with which the Toplevel GrantsOffice portal can be developed and changed has encouraged the business to move forward rapidly, delivering a vastly improved service to our grants applicants and holders, and effecting real outcomes in communities," Castle says.

HLF is encouraging people to apply online rather than on paper by being able to promise a more speedy initial response to online applications, as well as more support and advice earlier in the application process. HLF staff can also ensure applicants provide only the information needed, allowing applicants to keep the costs of the application stage as low as possible, and any new information

provided is immediately available to everyone with access to the portal.

Internally, the staff at HLF who process applications no longer have to spend up to half a day per application typing the details into back-end systems, with the inevitable re-keying errors. Instead, the GrantsOffice portal integrates with key corporate systems. That frees up those people – who are typically highly knowledgeable experts in the heritage field – to concentrate on the far more valuable work of reviewing applications and providing advice to applicants.

This will help HLF address a suggestion from auditors in its last external performance review that staff were spending too much time on routine administrative work and not enough time on ensuring applicants and funded projects were successful.

"We are in the business of effecting real outcomes in the community, and Toplevel has helped us realise our ambition of achieving this as effectively and efficiently as possible" Castle concludes.

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