Theatres Trust in association with the Wolfson Foundation

Theatre Improvement Scheme Guidance Notes for Applicants

This guidance is intended to support your application to Theatres Trust’s Theatre Improvement Scheme in association with the Wolfson Foundation. The guidance notes will help you understand what we are looking for in each section or question on the application form. We are unable to answer individual enquiries about the scheme, due to the number of applications we receive. However, [www.theatrestrust.org.uk](http://www.theatrestrust.org.uk) has more helpful information including the terms and condition of the grant (which should be read in conjunction with these guidance notes) and details of a webinar you can join or a recording you can watch to learn more.

# Scope of the fund:

Theatre operators can apply for grants of up to £20,000 towards their building or equipment as part of the scheme. There is no match funding requirement although if the project costs are above £20,000 it will strengthen the bid to demonstrate where additional support will be found.

# What we hope to fund:

This scheme will prioritise capital development projects which improve a theatre building’s environmental sustainability and demonstrate how a small intervention can produce big reductions in environmental impact, such as:

* purchase of key plant and machinery
* replacement of inefficient or out-dated equipment
* improvements to building heating or insulation
* planting sedum roofs or green walls
* impactful, high-quality interventions

Previous awards have been issued to venues to:

* Replace or install a building management system (BMS) to improve building management efficiency, reduce energy usage and maximise staff capacity.
* Supply new heating or cooling systems to reduce environmental impact and improve audience and artist experience in the auditorium.
* Improve draught-proofing of windows or doors to retain heat and save costs.
* To replace Tungsten with LED lighting and support purchase of digital lighting operating systems.

To be eligible, venues must:

* own or manage theatres with titles or signed leases of more than 5 years on buildings in England, Scotland, Wales and Northern Ireland
* run a year-round programme of live performance, of no less than 30 performances a year of theatre, dance, comedy, musicals.
* have a bona fide UK charitable or not-for-profit legal structure and be able to provide certified or audited accounts for at least two years. This can include local authorities or Town and Borough Councils that own and/or operate a venue.
* Organisations previously in receipt of grants from the Theatres Trust (including through this scheme) may not apply until 12 months after the date of receipt of the Final Evaluation Report for that award.
* Organisations that have previously received a direct grant from the Wolfson Foundation can apply to this scheme providing it is for a different project.
* Have the permission of the property owner and any relevant planning body to do the work required.
* Operate theatres that achieve excellence through their producing and programming and / or community engagement and / or architectural significance.

We cannot fund:

* Venues that are primarily cinemas or music venues.
* Works that have already started or are due to start before a decision about our funding is made.
* Revenue costs, including training costs.
* Loss of income related to project installation.
* The cost of building surveys or reports.

We welcome applications from theatre venues across the UK that meet these criteria, whether voluntarily or professionally run.

You will receive a response to your application within approximately 16 weeks after the closing-date, so we are not able to fund work that requires urgent or immediate attention before this time.

# Word count guides:

We ask you to work within the word count guides (where given), making the most of the opportunity to tell us your story while also keeping your information concise.

# Questions:

1. **Name of project**

This is the opportunity to summarise your improvement works in a brief sentence. The project’s name may be used for publicity and promotional purposes.

**2 Contact details**

These questions provide us with all the contact data required about the individual and organisation applying for funding. This may differ from the details we request about your venue at question 3.1 below.

**3 Theatre details**

**3.1 – 3.15 Management and governance structure**

These questions will supply us with details of your venue’s location, activities, governance, and management structure.

We ask for two years of annual accounts to ensure you are a going concern and to give us an overview of your current financial position.

**4. Your theatre**

These questions tell us about your theatre building, both its history and the basis on which it is owned and operated. We request this information, so we understand the context in which your application is being made.

All applicants are required to have a lease of five years or more. This is so that any purchase or improvement our funding supports will make a difference to your theatre’s operation for a sustained period.

We also need to know that you have permission to undertake the work required so that funding we may provide will be used for the purpose intended.

* **In questions 4.2 and 4.3** we ask if your building is listed. This is for our information only and is not an eligibility requirement.
* **In question 4.4** we ask if your building is listed as a community asset or is on land registered with a community interest. In both cases this is a way of securing a building or land in community ownership or operation as an asset that furthers the social and cultural interests of the local community (or has done in the recent past). This is for our information only and is not an eligibility requirement.
* **In question 4.6** we ask you to summarise your artistic/programming policy together with details of your community/learning/outreach work. This is your chance to explain how you define and measure excellence in your organisation, outlining your achievements and your ambitions.
* **At question 4.9** we ask for digital images of your theatre’s exterior. This will help easily identify your application. If your application is successful, we will request further images for publicity purposes.

**5. Improving sustainability**

In this section, we ask you to explain how you would use this grant. Please give details of the improvement works that you plan to undertake. Ensure you succinctly explain the exact works involved, and whether they fit into a larger phased scheme (if applicable). The [Theatre Green Book](https://theatregreenbook.com/) provides guidance that will be useful. A second edition that includes a new Building Survey Tool is to be launched on 3 June 2024.

Please also give details of how you will measure the impact of your proposed work and achieve best practice in theatre design. (500-word limit).

* **5.2 – 5.3** please identify whether you have used the Theatre Green Book and / or the Building Survey Tool to help you identify priority sustainability interventions and how this project helps you address those priorities.
* **5.4 – 5.6** we require copies of any quotes, plans or photographs which supplement and enhance the detail given in your project description above.

**6. Project management and delivery**

These questions give us information about how and who will manage your project and whether additional permissions or consent is required from other parties before you can commence.

* **6.6** asks you to briefly list the key risks you have identified in the project and how you plan to mitigate them.

**7. Project cost**

These questions help us understand what part our funding will play within your project and to quantify the anticipated costs. We ask you to give the figures net of VAT and that you clearly explain the VAT position of the project.

# Supporting document check list:

1 Lease (if applicable)

2. Annual accounts for two previous years (required)

3. Photo of theatre exterior (required)

4. Quotes and/or estimates for building works (required)

5. Photos/plans to explain the scheme (optional)

6. Budget (required)

# What happens next?

We will acknowledge receipt of your application within two working days

Applications will be acknowledged when received and logged. If you do not receive an acknowledgement within two working days of submission, please telephone our offices on 020 7836 8591 to confirm receipt of your application. Please leave a voicemail if we are unable to answer you call so we know to call you back.

Please note that Theatres Trust operates a data security system that includes a spam filter which may block emails with large attachments or from unknown senders. Theatres Trust will not be responsible for the non-delivery of your emailed application due to any technological reason. It is the applicant’s responsibility to ensure that their application has been received.

We will assess the application against the following criteria:

## Impact and significance:

* How effectively the applicant makes a compelling case for a capital development, refurbishment or equipment purchase to improve environmental impact of the building.
* How effectively the applicant makes a case for the development being important now.
* The role and significance of venue to its communities and users.

## Management and risk:

* How effectively the applicant illustrates that the project is achievable within the value of the fund (up to £20,000), based on a budget and quotes that provide appropriate costings and details of any other income required.
* How effectively the applicant demonstrates that the project will be well managed financially and operationally by an experienced team.
* How effectively the applicant shows an understanding of the risks involved, has plans for potential adaptations required and has team in place to manage and offset.
* To know that the project is achievable within the timescale of the fund.

Balancing criteria

* As the national body for theatres in the UK, geographic spread will be taken into account when making award decisions.

We will let you know the outcome of the application within approximately 16 weeks of the closing date. Grants will be awarded in line with the funding request.

**If successful,** we will send you an offer letter, bank details form, grant agreement and terms and conditions.

Your grant will be paid to you in full once you tell us that the work is due to start. The grant must be claimed within one year of the date of the offer letter.

Once you let us know that the project is due to start, we will issue you with an evaluation report form which we you must send back to us within six months of completion of the project in order that we can assess the impact of our support, create case studies and feedback to our partners. You may not re-apply for a Theatres Trust Grant until 12 months after the date of receipt of your final Evaluation Report.

**If unsuccessful,** we will send you an email with a brief indication of why you have not been successful and providing general feedback. Unfortunately, we are not able to provide any further detailed feedback due to the volume of applications we receive. You may re-apply in future rounds.

**Theatres Trust, May 2024**