

Working towards creating dementia friendly parks, outside spaces and nature reserves: development of a guide and environmental self-assessment tool.

Guidance for Case Study Applicants

Contents

1. Introduction
2. The case studies
3. Who can apply
4. Selection
5. Responsibilities of case study sites
6. Capital works and digital outputs
7. Application process
8. Selection of case study sites
9. Production of case study reports
10. The National Lottery Heritage Fund Community Grant information

Annex 1 Timetable, reporting framework and grant release

Annex 2 Case study project plan approval criteria

Please note that this guidance outlines the process for the application and approval criteria for the selection of the case studies and the release of the capital grants which are an integral part of the overall project and its evaluation. It also outlines the responsibilities of the case study sites who will be in receipt of the grants.



This work is funded by
The National Lottery
Heritage Fund



1.Introduction

This project is being funded by The National Lottery Heritage Fund and will create new resources including a guide, environmental self-assessment tool, App, training video and case studies to enable parks, outside spaces and nature reserves (hereinafter sites) to work towards becoming more dementia friendly, thereby improving access to natural heritage for people living with dementia and those who care for them, a currently underserved group.

The project is being led and co-ordinated by the Association for Dementia Studies (ADS), University of Worcester on behalf of collaborators from Natural England, Dementia Adventure, Green Flag Award (Keep Britain Tidy), Greenwood Community Forest, Rushcliffe Dementia Action Network, The Midlands Parks Forum, The National Forest Company, The National Trust, and South Nottinghamshire Place Based Partnership.

2.The case studies

To demonstrate that using the new resources can enable sites to work towards becoming more dementia friendly and accessible, six case studies are key to the overall project evaluation. They will explore the impact of the resources in more depth and over time to illustrate how sites can make improvements to become more dementia friendly. Each of the six sites will receive a capital grant of £10,000 (to include acknowledgement of the Heritage Fund and VAT). In the current economic climate, the grant will ensure that the case study sites have the budget and resources to undertake dementia friendly environmental changes and effect measurable improvements within the project timescales. The grant from the Heritage Fund is for a capital improvement/s, which may include the creation of digital outputs (see section 6 below) but may not be used for revenue expenditure for example staff or for the setting up or running a dementia cafe. Please see section 10 for important information about the grant.

Applications are being invited during September 2026 during the final stages of the development of the project resources (the environmental dementia friendly self-assessment tool, guide and educational video). The opportunity to apply is being disseminated through the existing networks of the Project Working Group and Steering Group members (to reach both the green space sector and dementia related groups), the ADS website, blogs and via social media. All documentation relating to the application process (e.g. application form and guidance) will be downloadable from the project website <https://outdoordementiadesign.on.worc.ac.uk/index.php/case-studies/>. Applications will close on the 30th September 2026 and the six case study sites will be chosen by the Steering Group according to the criteria outlined in section 8.

Once chosen, the six case study sites will be asked to undertake a dementia friendly environmental self-assessment using the new resources. They will then develop a project plan for the improvements that they wish to make using their capital grant,

including budget and timescales (a format for the project plan will be provided). The project Steering Group will agree the plan and 90% of the grant then released. The final 10% of the grant will be paid on project completion.

Based on ADS' previous experience of dementia friendly design for gardens, these improvements are likely to include aspects such as accessible signage, improving facilities such as toilets and cafes, seating areas, handrails, accessible walkways, quiet spaces and the development of easily accessible information prior to a visit.

Although ADS will administer the grants and the project Steering Group will select the case study sites and agree the improvement plans for each site, they will not be involved in the improvements or any subsequent maintenance activities. These will be the responsibility of the relevant managers/senior staff at each case study site. Each site will be expected to abide by their own organisation's operational policies including financial regulations and tendering procedures. They will also be required to seek relevant permissions for their improvements from the site owner and obtain planning permission if required.

ADS will be in regular contact (approx every 2-3 months) with each of the case study sites, via online meetings and/or visits, and the sites will be required to provide regular short written updates using a progress reporting framework. The evaluation will require each site to be responsible for gathering information on the progress of and impact of their improvements to inform their final case study report. ADS will provide a case study pack to indicate the types of information that might be collected which could include written documents with images or photos, video recordings, or audio recordings.

Once complete, the six case studies reports, together with the overall programme evaluation findings, will be hosted on the project website to inspire others to effect change.

3. Who can apply

The opportunity to apply to become a case study is open to all parks, outside spaces and nature reserves in England. The new resources are generic and being developed for use in outdoor spaces of any size from small town parks to large nature reserves.

Sites that have already been involved in the testing process for the resources may apply, as may any other site in England that has not been involved in the project so far.

Applicants are advised to review the information in this guidance document to ensure that they will be able to demonstrate that they have met the project plan approval criteria as set out in Annex 2, and that they have the resources available to complete the requirements and responsibilities of being a case study.

4.Selection

The selection of the six case study sites will be made by the Steering Group which has approved the application process and criteria. They will agree the project plans before any grant is released and monitor the progress of the sites via the written updates.

No members of the Steering Group or Project Working Group who may have a conflict of interest relating to any application will be involved in the selection process. Any queries regarding what constitutes a conflict of interest will be resolved by the Steering Group.

5.Responsibilities of case study sites

Nothing in the case study guidance should supersede the individual site's statutory and organisational policies including health and safety requirements. Case study sites will be required to abide by their organisation's operational policy and procedures including tendering processes and financial regulations, seeking relevant permissions as required.

Each case study site will be required to:

Once their application has been approved

- Sign an agreement to become a project case study
- Nominate a project manager and form a project group to manage their project
- Attend an introductory briefing and online progress meetings as arranged (via MS Teams)
- Undertake a dementia friendly environmental self-assessment of their site using the newly developed self-assessment tool and guide
- Develop a project plan detailing how they will use their capital grant to undertake dementia friendly improvements identified through the assessment and submit this for agreement by the Steering Group. A report format for the project plan will be made available to sites.
- The project plan is expected to include:
 - timescale, budget, resources required, potential risks for the project, and mitigation steps
 - who will be involved including staff, volunteers and people affected by dementia (those living with dementia and their carers/families)
 - what changes they would hope/expect to see from the improvements
 - a copy of their completed environmental self-assessment tool
 - how they plan to acknowledge the funding from the Heritage Fund and any other funders

Once the project plan has been approved

- 90% of the capital grant will be released. The remaining 10% of the grant will be released on receipt of the final case study report, confirmation of grant expenditure and acknowledgment of the Heritage Fund
- Comply with the progress reporting framework
- Comply with the requirements of the production of the case study report
- Submit their final case study report within the project timeline
- Take part in any relevant promotional activities

Throughout the duration of the case study

- Inform ADS immediately of any material changes throughout the project e.g. changes in the project plan, changes to the project team.

6. Capital works and digital outputs

The Heritage Fund defines capital works as works that create or improvement of an asset. These might include improved signage, seating, paths or handrails, enhanced facilities for visitors including toilets and cafes, or updating websites to improve the information available to visitors prior to visiting the site.

7. Application process

Applications should be made by completing and submitting an electronic application form available on the case study application webpage

<https://outdoordementiadesign.on.worc.ac.uk/index.php/case-studies/>.

If for any reason it is not possible for a site to submit an electronic application form a Word version of the application form will be downloadable from the case study application webpage with instructions about how to submit the application via email.

In order not to disadvantage sites that have not been involved in the testing of the resources a copy of the final draft of the dementia friendly environmental self-assessment tool will be available to download from the case study application webpage.

8. Criteria for the selection of case study sites

The Steering Group is expected to consider the following criteria when selecting the six case studies to ensure that there is diversity across the six sites, both in terms of the types of site and the types of improvements planned. It is not expected that all successful applications will meet all these criteria, they are presented as a guide to give an indication of the likely information given by applicants that will be considered by the Steering Group.

A site would still be considered for selection by the Steering Group if it meets none of the criteria. However, the application would need to demonstrate their commitment

and focus on linking with their local communities, people living with dementia, sustainable change, or other special reasons why they should be considered for selection.

General considerations

- Size and location of site (urban, rural, coastal)
- Particular special features at a site e.g. open water, coastline, wildlife, forests, or designated heritage assets
- Ownership and facilities provided
- Admission fee charged or free to access
- Involvement of a site in any other project funded by the Heritage Fund
- National accreditation or designation of a site

Specific considerations

- Existing engagement with people affected by dementia
- Links with the local community
- Dementia friendly improvements already planned at a site
- Availability of funding for general improvements during the financial year

In addition

- Sites will need to confirm that they have the resources to meet the requirements of being chosen as a case study.

The Steering Group's decision will be final, and no correspondence will be entered into in respect of the decision making process.

9. Production of case study reports

A separate case study production pack will be provided to sites that have been successful in their application for a grant. As each case study site will be different and have individual plans, ADS will work with the successful sites to identify specific aspects of their proposed project that should form part of the case study report. These might include the number of visitors, how to obtain feedback from visitors, staff and volunteers about the changes made, information on any links made with local community groups or dementia charities, and a reflection on the success of the outcomes they expected when they developed their project plan.

The pack will include what is involved in being a case study site, what (not) to capture, what needs permission, and how to obtain permission. A template consent form for gaining permission (photo/video/audio) will be provided to ensure that anyone featured in a case study report gives permission and knows how the report may be used/shared. Each case study site will be expected to give agreement for the use of their case study report under a Creative Commons licence. Exemptions from the licence will be sought, if necessary, for example if people are under 18 years old are involved or they include special categories or personal data such as health or sexual orientation. The case study

reports could include written documents with images or photographs, video recordings, or audio recordings. They will be accessible by including alt text, headings, subtitles and transcripts as appropriate.

10.The National Lottery Heritage Fund Community Grant requirements

The successful case study sites will each receive a Community Grant from The National Lottery Heritage Fund of £10,000 (including VAT and Heritage Fund acknowledgement)

Each site will need to abide by the Heritage Fund's requirements regarding their capital grants and the length of time which the grant terms apply which depends on the core activities carried out in your project.

For projects creating **digital** outputs, for example the creation of a website, the terms and conditions apply until five years after the project completion date. If the lead applicant is a private owner of heritage, the terms will apply for five years from the project completion date.

For **capital** based projects, for example new building or restoration works, the terms apply until five years after the project completion date. If you are a private individual or for-profit commercial organisation the terms and conditions will apply for 10 years after the project completion date.

Providing evidence of expenditure

Each case study site will need to keep a record of all grant expenditure including providing receipts for items over £500. Further guidance on recording all expenditure will be given to successful sites.

Association for Dementia Studies, 26 August 2026



This work is funded by
The National Lottery
Heritage Fund



Using money raised by National Lottery players, The National Lottery Heritage Fund supports projects that connect people and communities with the UK's heritage. Our project on 'Working towards creating dementia friendly parks, outside spaces and nature reserves' is made possible with The National Lottery Heritage Fund. Thanks to National Lottery players, we will be able to develop a guide and environmental self-assessment tool to improve access to outside spaces for people affected by dementia.

Timeline, reporting framework and grant release

Project	Activity
Month 7 August 2026	• Opportunity to apply to be a case study advertised widely through the networks of project collaborators (to reach the green space sector and dementia related groups), blogs and social media • Information for prospective applicants including Application form and Case Study Applicant Guidance finalised
Month 8 September 2026	• Application process opened from 1st to 30th September • Applications submitted electronically • Receipt of applications acknowledged
Month 9 October 2026	• Selection of case study sites by Steering Group • Successful and unsuccessful sites informed of the outcome • Agreements signed with successful sites • Project teams recruited by successful sites
Month 10 November 2026	• Induction meeting for successful sites (via MS Teams) • Sites undertake dementia friendly environmental assessments using the new resources • Sites develop project plans and submit to ADS (<i>pro-forma to be developed</i>) • Project plans agreed by Steering Group • First tranche of grant payments made (90%)
Month 10 – 21 November 2026 – October 2027	• Case study projects underway • Project updates submitted as required (likely to be at 3-month intervals – <i>pro-forma to be developed</i>) • Ongoing progress meetings with successful sites to support their case study development (via MS Teams) •
Month 22 November 2027	• Case study, final declaration of expenditure and confirmation of The National Lottery Heritage Fund acknowledgement submitted to ADS • Final payment (10%) made on receipt of case study report and confirmation of grant expenditure and The National Lottery Heritage Fund acknowledgment.

Case study project plan approval criteria

The Steering Group will use the following criteria to agree project plans prior to their approval and release of the capital grant.

Choice of project location

- Is the project location in an area that is used by visitors?
- Will the project directly benefit visitors including those affected by dementia?
- Will the choice of project act as an exemplar to others?

Public Involvement

- Does the project plan indicate how people affected by dementia will be involved in planning and implementing the proposed project?
- Does the project plan demonstrate how the local community will be involved in planning and implementing the proposed project?

Functionality

- How will the project enable the site to become more dementia friendly?
- Have the requirements of people with special needs been integrated into the project including any Disability Discrimination Act (DDA) requirements?

Grant requirements

- Does the plan indicate that the project will meet the Heritage Lottery grant terms?

Financial

- Can the project including VAT and acknowledgement of The National Lottery Heritage Fund be achieved within the £10,000 capital grant?
- If not, has additional funding been obtained/identified?
- Is the budget for the project clear, detailed and comprehensive?
- Does it contain an element of contingency?

Implementation issues

- Is the project achievable within the agreed timetable?
- Has permission from the site's owner been obtained?
- Have any other required permissions been obtained?
- Is there a detailed plan with key milestones?
- Who will carry out the work?
- How will communications/relationships with all stakeholders be handled during the implementation of the project?

For structural/physical projects

- Are the materials to be used robust enough to survive long-term wear?
- Have cleaning and maintenance issues been addressed and can they be accommodated within the site's resources?
- How have the improvements been designed to be dementia friendly?
- Is there a commitment from the site owner to meet any ongoing revenue requirements?

For digital projects

- Will the website (or other digital outputs) be free to access?
- Will it be easy to locate via a search engine?
- Will it be easy to navigate?
- Will the information be easy to find?
- How has the content been designed to be dementia friendly?
- Will the proposed site conform to appropriate accessibility standards?