Page

Heritage 2033 – our 10-year strategy

As the largest funder for the UK's heritage, our vision is for heritage to be valued, cared for and sustained for everyone, now and in the future.
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Over the next decade we will take a longer-term view, investing in heritage for the future as well as for the present. We will invest in places, not just individual projects, to bring about benefits for people, places and our natural environment.

We will strengthen partnerships with governments, local authorities and statutory agencies and create new collaborations with those who share our vision.

These ambitions are set out in a simplified investment framework and form the foundation of our shared vision for heritage to be valued, cared for and sustained for everyone.

- Quick look: strategy overview
- Explore and download our new strategy

Delivery plan 2023–2026

In the first of our three-year delivery plans we set out how we plan to invest over £1billion between 2023–2026, changes to our National Lottery Grants for Heritage and our priorities for investment.

- Explore and download our delivery plan 2023–2026

Our investment principles

Four new investment principles will guide all our decision making through open programme funding, our strategic initiatives or when entering new collaborations and partnerships.

- **Saving heritage**: conserving and valuing heritage, for now and the future.
- **Protecting the environment**: supporting nature recovery and environmental sustainability.
- **Inclusion, access and participation**: supporting greater inclusion, diversity, access and participation in heritage.
- **Organisational sustainability**: strengthening heritage to be adaptive and financially resilient, contributing to communities and economies.

We will ask projects we fund to take all four investment principles into account in their applications.

Addressing our investment principles in your application

Insight

Explore the research, feedback and analysis that's informed our new strategy:

- an analysis of our engagement survey results
- a report of our sector and general public research
- our equality impact assessment of Heritage 2033

Heritage 2033 overview

See all updates
Want a quick overview of our 10-year strategy? Explore our short video and our 'strategy in page' below and in the attached PDF.

Attachment	Size
Heritage 2033 strategy in a page	723.63 KB
Strategaeth Treftadaeth 2033 mewn tudalen	137.16 KB

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Our vision

We want heritage to be valued, cared for and sustained for everyone, now and in the future.

Our investment principles and what we'll achieve by 2033

Saving heritage:

- improved condition and understanding of heritage
- reduced amount of 'heritage at risk'
- delivered transformational long-term projects
- made digital heritage more accessible

Protecting the environment:

- put landscapes and habitats into recovery
- increased understanding of and connection to nature

- reduced the negative environmental impact of our funding portfolio
- improved heritage's ability to adapt to climate change

Inclusion, access and participation:

- increased diversity of heritage workforces and audiences
- reduced barriers for people under-served by heritage
- enabled more people's heritage to be recognised
- championed digital technology to improve access

Organisational sustainability:

- increased organisations' commercial and governance capabilities
- developed skills and capacity across heritage
- embedded resilience in projects we fund
- strengthened heritage's contribution to local economies

Our approach

- Open programmes for all types of heritage projects with the majority of decisions made at local level.
- Strategic interventions to tackle issues at large and cross-territory scale.
- Partnerships that combine resources and expertise to create investments with greater impact.
- A focus on place, landscape and nature, heritage in need and responding to opportunities and emergencies.

Heritage 2033

See all updates
The National Lottery Heritage Fund strategy 2023–2033.

Attachment	Size
Heritage 2033, The National Lottery Heritage Fund strategy 2023–2033	11.17 MB
Treftadaeth 2033, Strategaeth Cronfa Treftadaeth y Loteri Genedlaethol 2023–2033	3.11 MB

Foreword

The National Lottery Heritage Fund's 10-year strategy sets out our ambitions to support projects of all sizes that connect people and communities to the UK's heritage.

Our consultation found that people wanted us to do even more to address the challenges heritage faces and to increase the positive contribution it makes to life in the UK.

Over the next decade we will take a longer-term view, investing in heritage for the future as well as for the present. We will invest in places, not just individual projects, to bring about benefits for people, places and our natural environment.

We will strengthen partnerships with governments, local authorities and statutory agencies and create new collaborations with those who share our vision.

These ambitions are set out in a simplified investment framework and form the foundation of our shared vision for heritage to be valued, cared for and sustained for everyone.

– The National Lottery Heritage Fund Board of Trustees

Introducing our strategy

As the largest funder for the UK's heritage, our vision is for heritage to be valued, cared for and sustained for everyone, now and in the future. We believe in the power of heritage to ignite the imagination, offer joy and inspiration, and to build pride in place and connection to the past.

Over the next 10 years, we aim to invest £3.6billion raised for good causes by National Lottery players to make a decisive difference for people, places and communities.

In summer 2022, over 4,000 stakeholders and members of the public shared their views on heritage and our future direction. This powerful feedback, combined with our own experience, has shaped our new approach.

We will strengthen and focus our support for the UK's heritage using four principles that will underpin our investment:

- saving heritage
- protecting the environment
- inclusion, access and participation
- organisational sustainability

We will use these principles to create a more flexible framework to guide our funding.

We will continue to do what we do well: our open programmes with devolved decision-making using the local knowledge and expertise of our six area and nation committees.

In future, we will also take a more proactive approach to strengthen strategic investment, targeting our resources towards the most urgent needs.

The detail of how we will deliver this 10-year strategy will be published through a series of three-year delivery plans.

Our renewed approach has been created through the generous contributions and expertise of many people and partners who care about heritage. We want to continue these conversations, so that National Lottery funding enables heritage to inspire, and challenge, to delight and fascinate, now and in the future.

– Simon Thurley, Chair

– Eilish McGuinness, Chief Executive

Achieving our vision

Our vision is for heritage to be valued, cared for and sustained for everyone, now and in the future.

We see heritage as broad and inclusive, adapting to contemporary and future uses and challenges. From the historic and natural environment to our museums, libraries and archives. From our industrial legacy to cultural traditions, stories, memories, celebrations and more. Heritage can be anything from the past that people value and want to pass on to future generations.

It is our privilege to support the UK's heritage with money raised by National Lottery players. Since 1994, we have invested over £8.2bn in more than 45,000 projects. We operate across all four nations of the UK as a non-departmental public body of the Department for Culture, Media and Sport (DCMS). We work in collaboration with a wide range of statutory bodies across the UK as well as other National Lottery distributors. We receive Financial Directions from DCMS as well as Policy Directions for the UK and England, and from the Scottish and Welsh governments, with Directions in Northern Ireland currently under development.

We deliver additional funding for heritage on behalf of governments and other bodies to achieve our shared aims.

Our four new investment principles will guide all our decision making through open programme funding, our strategic investments or when entering new collaborations and partnerships.

We will ask the projects we fund to take all four investment principles into account in their applications. The strength of focus, and emphasis on each principle, will be for applicants to demonstrate. We will provide greater detail on what this will mean through guidance and our delivery plans.

Investment principle 1

Saving heritage

Conserving and valuing heritage, for now and the future.

What we mean

Our support will ensure heritage remains accessible, relevant, sustainable and valued.

What we will do

Heritage at risk: We will commit funding to protect, conserve and revitalise heritage of all kinds that is in poor condition or at risk of loss, decline, damage, neglect or of being forgotten – ensuring it is valued and better understood.

Invest in places: Heritage has a unique role in bringing people together where they live, work and visit. We will increase people's connection with the heritage of their local places through targeted investment in our historic and natural environment.

Revitalise and maintain: We will invite proposals to work with us to develop the skills, capacity and innovation to sustain and manage heritage. We will identify opportunities for revitalising diverse types of heritage.

By 2033 we will have:

- Improved the condition, viability and public understanding of thousands of heritage sites, collections, habitats, species and intangible cultural heritage.
- Measurably reduced the amount of heritage identified as 'at risk', whether through loss, facing extinction, assessed as being in poor or unfavourable condition or at risk of being forgotten.
- Delivered long-term projects to transform local areas, towns, cities and landscapes by taking a targeted approach to improving the condition of heritage and the pride people take in their local environment.

- Ensured that the digital heritage resources we support are open, accessible and discoverable by future generations.

Investment principle 2

Protecting the environment

Supporting nature recovery and environmental sustainability.

What we mean

We will support natural heritage and environmentally sustainable projects that help the UK meet its nature recovery targets and mitigate the impact of climate change on heritage.

What we will do

Landscape: We will increase our support for strategic and landscape-scale projects – both rural and urban – that help habitats and species thrive, reducing and mitigating the impacts of climate change, while helping people connect to our unique natural heritage.

Nature: We will invest through partnerships to help halt and reverse the loss and decline of habitats and species.

Environmental footprint: We will support heritage projects that reduce adverse environmental impacts and help heritage to adapt to our changing climate. If projects involve construction, we will encourage restoration, conservation and reuse, rather than new build.

Mitigation: We will collaborate to bring natural, built and cultural heritage stakeholders together to identify and mitigate climate risks to heritage and involve people in bringing about positive behaviour change.

By 2033 we will have:

- Put landscapes and habitats in both urban and rural places into recovery, so they support abundant natural heritage and healthy natural systems.
- Increased people’s understanding and connection with nature across towns, cities and the countryside.
- Reduced the negative environmental impact and carbon footprint of our funding portfolio.
- Improved the ability of natural and cultural heritage to plan for and adapt to a changing climate and helped projects take action for the environment.

Investment principle 3

Inclusion, access and participation

***Supporting greater inclusion, diversity, access and participation in heritage*.**

What we mean

We will support organisations to ensure everyone has opportunities to learn, develop new skills and explore heritage, regardless of background or personal circumstances.

What we will do

Involve a more diverse range of people in heritage, investing in volunteering, heritage careers, co-creating projects, leadership, governance and developing knowledge and skills.

Enable organisations to remove barriers to access and participation, particularly for people who are under-served by heritage.

Support all communities to explore and share their heritage, with a focus on making the stories of our four nations more inclusive of everyone's heritage.

Accessible digital heritage resources: Support greater use of digital technology to make heritage more accessible and enjoyable, and promote better access to heritage information, enabling projects to increase impact and reach.

By 2033 we will have:

- Increased the diversity of heritage workforces, leadership and audiences.
- Addressed the barriers to access for people under-served by heritage, providing more equitable opportunities for active involvement and participation.
- Enriched people's lives through our investment, enabling everyone's heritage to be recognised.
- Supported people to creatively use digital technology in heritage to promote access and reach.

Investment principle 4

Organisational sustainability

Strengthening heritage to be adaptive and financially resilient, contributing to communities and economies.

What we mean

We will support organisations to develop the skills and capacity to ensure a sound long-term future and encourage new heritage investment that benefits communities and economies.

What we will do

Support financial sustainability: We will continue to offer funding to build resilience, providing organisations with capacity and expertise to develop their long-term organisational and financial plans.

Support heritage skills development: We will collaborate with partners to identify opportunities to build capacity, skills and expertise in heritage, to contribute to thriving communities and economies.

Provide flexible funding: We will offer flexible financial support in the early planning stages of projects for preparatory analysis and activities. We will also make available follow-on funding for time-limited periods on completion of significant capital projects to help embed operational stability.

New finance and investment: We will champion the use of more diverse income sources such as green finance and commercial approaches and help build the capacity and skills needed to deliver this.

By 2033 we will have:

- Supported organisations to increase their financial and organisational sustainability by developing their commercial and digital skills and strengthening governance and leadership.
- Supported the development of skills and capacity in the heritage sector.
- Used our flexible funding model to embed resilience in the projects we fund.
- Enabled the heritage sector to strengthen its contribution to economies and local communities.

Our funding portfolio

Open, responsive, devolved

We will continue our current approach of offering open funding programmes – from small grants up to multi-million-pound projects – for all types of heritage.

Most funding decisions will continue to be delegated to our six area and nation committees and operational staff across the UK. This will enable differences in heritage character in England, Scotland, Wales and Northern Ireland to benefit from local expertise.

Scale and reach

Our funding programmes have had a ceiling of £5million for over 20 years, which is limiting opportunities for some initiatives to come forward. From 2023, we will introduce a higher investment threshold of £10m to allow for larger-scale investment and will consider investing in projects above this threshold to support truly exceptional heritage projects across the UK. We will adapt our investment thresholds and approach through the 10-year strategy to respond to the needs and requirements of heritage.

Strategic interventions across the UK

We will also introduce new strategic funding streams with the aim of:

- Proactively tackling long-standing heritage issues at a large scale.
- Supporting projects that boost pride in place and connection to heritage.
- Strengthening our focus on heritage at the heart of places, nature and the environment.
- Enabling a coordinated cross-territory approach that will strengthen delivery.
- Allowing us to respond to emerging opportunities and emergencies at speed and at a national level.
- Supporting projects and addressing heritage gaps where proposals are not coming through into our open programmes.
- Accelerating new ideas and interventions where a deliberate approach is needed.

We will regularly review our strategic interventions through three-year delivery plans.

Early initiatives will include:

Place

We will target place-based investment that boosts pride in place and connects communities and visitors with heritage. Drawing on national indicators, combined with local intelligence about the need, opportunity and potential for heritage, we will invest at least £200m over the life of this strategy. We will boost the capacity of local places and communities to develop partnerships and seek out areas that have the potential to draw in and benefit from wider investment.

Landscape and nature

We will support large-scale projects that revive landscapes, support nature recovery and enhance connectivity for people and wildlife. We will work with partners including Areas of Outstanding Natural Beauty, National Parks, conservation organisations, communities and landowners to put entire landscapes and habitats into recovery so they support abundant natural heritage, rich cultural heritage and healthy natural systems. We will invest across rural, suburban and urban areas to enhance landscape character by funding new approaches, sustainable activities and capital improvements.

Heritage in need

We will take an evidence-based approach to identifying gaps in support to the heritage sector, particularly where there is heritage at risk and in need of conservation – for example places of worship or industrial heritage. We will provide targeted support to build capacity, develop approaches to project planning and diversify income streams to help build a future project pipeline.

Acquisitions, opportunities and emergencies

We will ensure we can respond swiftly and act when necessary to respond to unique situations and opportunities. This could mean supporting acquisitions of exceptional heritage, marking significant events or supporting heritage areas and organisations dealing with an unforeseen emergency. We will work flexibly when the heritage sector needs to come together to secure the future of the most important heritage of all types for future generations.

Heritage 2033 delivery plan: 2023–2026

See all updates
Explore how much we'll invest and how we'll deliver the aims of our 10-year strategy, Heritage 2033, over the first three years.

Attachment	Size
Heritage 2033 delivery plan 2023–2026 – year 3	1.24 MB
Treftadaeth 2033 cynllun cyflwyno 2023–2026 – blwyddyn 3	1.27 MB

Last updated: Summer 2025

Context

Purpose of the delivery plan

The National Lottery Heritage Fund's 10-year strategy, Heritage 2033, sets out our ambitions to make a decisive difference for people, places and communities as we invest an anticipated £3.6billion raised for good causes by National Lottery players over the next decade.

Our long-term strategy is supported by three-year delivery plans, setting out how the aims of the strategy will be delivered. They will allow us to take a flexible approach, adapting to heritage sector needs and responding to external events or opportunities over the 10 years.

Our 2023–2026 delivery plan sets out the key milestones and how we will deliver National Lottery investment for the first three years, as well as how we transitioned to our new strategy. This plan is updated annually as part of our business planning processes.

Our vision

Our vision is for heritage to be valued, cared for and sustained for everyone, now and in the future.

Our investment principles

Our four investment principles guide all our decision making:

- Saving heritage: conserving and valuing heritage, for now and the future.
- Protecting the environment: supporting nature recovery and environmental sustainability
- Inclusion, access and participation: supporting greater inclusion, diversity, access and participation in heritage.
- Organisational sustainability: strengthening heritage to be adaptive and financially resilient, contributing to communities and economies.

We ask projects we fund to take all four investment principles into account in their applications. Further details for applicants can be found on our website.

Our values

Our values and behaviours are fundamental to the way we work. They are embedded across our strategic and business planning and our leadership and management. Our four values are:???

- **Inclusive**?of all aspects of heritage, people and communities.?
- **Ambitious**?for our people, communities and heritage.?
- **Collaborative** by working and learning together.?
- **Trusted**?for our integrity, expertise and judgement.

The role of The National Lottery Heritage Fund

As the largest funder for the UK's heritage, The National Lottery Heritage Fund (Heritage Fund) has the privilege of investing money raised by National Lottery players into heritage across the UK, in collaboration with a wide range of statutory bodies, as well as other National Lottery distributors. We award 20% of the good causes income raised by National Lottery players and deliver grant programmes on behalf of the UK and devolved governments that align with our vision and investment principles.

We are a non-departmental public body accountable to Parliament via the Department for Culture, Media and Sport (DCMS). Our decisions about individual applications and policies are entirely independent of the government. Just under 97% of our funding decisions are devolved to our six area and nation teams and committees across the UK, drawing on deep local knowledge and insight, and working closely with local communities and stakeholders. The Trustees of the National Heritage Memorial Fund is our legal body for the administration and supervision of all funds vested in us. It was set up by the National Heritage Act 1980 to administer the National Heritage Memorial Fund.

The role of the National Heritage Memorial Fund

The National Heritage Memorial Fund (Memorial Fund) was set up in 1980 to save the most outstanding parts of our national heritage, in memory of those who have given their lives for the UK.

As a fund of last resort, the Memorial Fund provides financial assistance towards the acquisition, preservation and maintenance of some of the UK’s finest objects and landscapes. These range from historic houses and works of art, to trains, boats and ancient landscapes. The Memorial Fund has helped create a world-class collection that belongs to the people of the United Kingdom, forever.

This delivery plan details how we will deliver National Lottery investment.

Our plan for 2023–2026

Delivering Heritage 2033

Our priority for this first delivery plan was to implement our new strategy and transition from the Strategic Funding Framework 2019–2024 to the aims and four new investment principles set out in Heritage 2033.

In the first transitional year (2023–2024) we established and streamlined our funding processes as we transitioned to assessing funding applications under the four investment principles, as well as mapping the development of our strategic initiatives and partnerships. This implementation programme included updating our guidance, application forms and process, and development work to review the way we monitor and evaluate the impact of our grants. We continue to review the impact of the transition on grant applicants and staff as part of the continuous improvement of our grant delivery and governance processes.

Our funding approach will continue to be open, responsive and devolved, as indicated above, using local knowledge and expertise to support heritage projects at the heart of locally led visions for change. We will:

- deliver a place-based approach, boosting pride in place and connection to heritage through our investments, strategic initiatives and partnerships
- establish new partnerships, long-term collaboration and co-created heritage projects with a diverse range of people and communities
- use research, analysis and insight to support a shared long-term vision for heritage and improve our delivery
- champion innovation to find new solutions to heritage challenges and identified sector needs
- grow digital leadership and confidence across UK heritage
- collaborate with partners in governments, arm's length bodies, the other National Lottery distributors and independent trusts and foundations to shape new initiatives, targeting our resources towards the most urgent needs including people and places under-served by heritage and contributing to thriving communities and economies
- be an inclusive, accessible and equitable funder, making the stories of our four nations more inclusive of everyone's heritage

Investment plans and budgets

Our three-year investment and delivery plans are set out below. Budgets for this final year of the 2023–2026 plan are indicative, based on National Lottery income forecasts provided by the Gambling Commission. Forecasts are subject to change and budget plans were reviewed annually throughout the three years and updated as necessary to meet strategic priorities.

As detailed below, we also distribute non-Lottery funding, including from UK governments, to support and strengthen heritage across all four nations.

Total projected National Lottery investment

Programme	Year 1 2023–2024	Year 2 2024–2025	Year 3 2025–2026
Total National Lottery investment	£415million	£399million	£431million
Open programme investment	£408m	£375m	£357m
National Lottery strategic initiatives	£7m	£24m	£74m

Other funding programmes investment

- £68.05million

National Lottery programme activities

National Lottery Heritage Grants (previously National Lottery Grants for Heritage)

Our open programme for all types of heritage projects in the UK.

Year 1 (2023–2024):

- Revise National Lottery Grants for Heritage in line with Heritage 2033.
- Change grant thresholds to £10,000–£10m and undertake scoping work to continue to deliver grants under £10,000 through other organisations and initiatives.*
- Review and streamline our applications, assessment and monitoring processes.
- Manage and support customers through the application transition from the Strategic Funding Framework 2019–2024 (SFF) to Heritage 2033:
  - last applications for development grants between £10,000 and £10million under SFF: November 2023
  - last applications for grants up to £10,000: December 2023
  - first applications for grants between £10,000 and £10million under Heritage 2033, with new guidance and application forms: January 2024
- Work with partners, including DCMS and statutory agencies, in developing our approach to skills and children and young people.

*Grants above £10m can be awarded in exceptional circumstances to deliver Heritage 2033 ambitions.

Year 2 (2024–2025):

- Complete the transition to deliver National Lottery Heritage Grants under the four Heritage 2033 investment principles.
- Make the first awards up to £250,000 under Heritage 2033.
- Make the first awards over £250,000 under Heritage 2033.
- Continue to scope and deliver grants under £10,000 through other organisations and initiatives where there is strategic demand and evaluate.
- Continue to streamline our application, assessment and post award processes.
- Decide on approaches to support projects to engage children and young people in heritage and provide routes into skills development through National Lottery Heritage Grants.

Year 3 (2025–2026):

- Continuous improvement of customer application and assessment processes including streamlining post award actions and measuring the initial impact of National Lottery Heritage Grants under Heritage 2033.

Strategic initiative: Heritage Places

Helping to transform the heritage in 20 different places, put heritage at the centre of local approaches to boost pride in place, revitalise local economies and improve people's connection to where they live, work and visit.

Year 1 (2023–2024):

- Nine locations identified for strategic investment using data about heritage, society and investment levels, alongside local intelligence.
- Understand local needs of selected locations, support capacity to plan ahead and engage audiences.
- Project planning and development grants.

Year 2 (2024–2025):

- Grants available for the delivery of projects.
- Identify the next round of places.
- Set up processes for evaluation and cohort learning.

Year 3 (2025–2026):

- Identify and announce the next round of Heritage Places.
- Initiative will continue over the lifetime of the 10-year strategy.

Strategic initiative: Nature Towns and Cities

Partnership to deliver urban nature recovery through thriving historic parks and green spaces.

Year 1 (2023–2024):

- Develop partnerships to design and deliver initiative.
- Understand local needs, design and capacity building.

Year 2 (2024–2025):

- Initiative design developed in partnership with the National Trust, Natural England and working closely with NatureScot, Natural Resources Wales and the Northern Ireland Environment Agency.
- Launch of partnership initiative and grant programme.

Year 3 (2025–2026):

- Grants available for the delivery of projects.
- Monitoring and evaluation.
- Grant funding to continue until July 2028.
- National conference to deliver engagement and early highlights of partnership programme.

Strategic initiative: Landscape Connections

Landscape-scale nature recovery across UK national landscapes, providing better connections for people and nature.

Year 1 (2023–2024):

- UK-wide stakeholder engagement to develop the initiative.
- Initial investment to support project planning.

Year 2 (2024–2025):

- Launch of £150m fund to support around 20 projects to enhance and protect the UK's world-class landscapes and first award made.

Year 3 (2025–2026):

- Grants available for development and delivery of next Landscape Connections projects.
- Community of practice established.
- Monitoring, evaluation and cohort learning established.
- Initiative will continue over lifetime of our 10-year strategy.

Heritage in Need

Identifying gaps in support to the heritage sector, particularly where there is heritage at risk and in need of conservation.

Year 1 (2023–2024):

- Research and development and working with strategic partners across the UK to identify the initial focus for support, including for Places of Worship.

Year 2 (2024–2025) and year 3 (2025–2026):

- Use data and insight to set out our overall approach to prioritising heritage in need.
- Places of Worship: strategic investment in projects across the UK to build capacity and fill gaps in current support for heritage at risk and target promotion of our support for repair and conservation needs.
- Maritime heritage: stakeholder engagement and research to define our investment priorities in this area for National Lottery funding.

Year 3 (2025–2026):

- Develop framework and identify areas for future investment focus.
- Continued promotion of our support and investment in strategic and single site projects to fill gaps in support for Places of Worship and maritime heritage at risk and in need of conservation.

Opportunities

Responding swiftly, and acting when necessary, to address unique situations, opportunities and events.

Year 1 (2023–2024):

- Eurovision Liverpool 2023.
- City of Culture.
- New to Nature programme (expansion).
- National Lottery 30th birthday preparation.

Year 2 (2024–2025):

- City of Culture delivery.
- National Lottery 30th birthday celebration.
- Archives Revealed.
- Respond to further opportunities.
- New to Nature evaluation and next steps.

Year 3 (2025–2026):

- City of Culture delivery ends.
- Archives Revealed.
- Art Fund’s Going Places.
- Respond to further opportunities and acquisitions.

Existing programmes and collaborations

Ongoing initiatives that support new ways of working, innovative investment and resilience.

Year 1 (2023–2024):

- Heritage Innovation Fund.
- Arts & Culture Impact Fund.
- Heritage Impact Fund.
- Facility for Investment Ready Nature in Scotland.
- National Churches Trust: Cherish programme.
- Architectural Heritage Fund: Heritage Development Trust Initiative.
- Levelling Up Fund (sector support).
- Museums Estates and Development (MEND) Fund.

Year 2 (2024–2025) and year 3 (2025–2026):

- Heritage Innovation Fund.
- Arts & Culture Impact Fund and our collaboration and support for establishing Figurative, incorporating Arts and Culture Finance, Nesta into an independent organisation, driving impact, innovation and investment in culture.
- Heritage Impact Fund.
- Facility for Investment Ready Nature in Scotland.
- National Churches Trust: Cherish programme.
- Architectural Heritage Fund: Heritage Development Trust Initiative.
- Museums Estates and Development (MEND) Fund.

Year 3 (2025–2026):

- Heritage Innovation Fund.

- Arts & Culture Impact Fund and our collaboration and support for Figurative.
- Heritage Impact Fund.
- Facility for Investment Ready Nature in Scotland.
- National Churches Trust: Cherish programme.
- Architectural Heritage Fund: Heritage Development Trust programme.
- Museums Estates and Development (MEND) Fund, working with Arts Council England.
- Support for Historic England's National Grants Panel (Heritage at Risk Capital Fund).

Other funding programme activities

We also distribute non-Lottery funding, including from governments, to support heritage across the UK.

The current portfolio of agreed programmes is set out below.

Programmes delivered in partnership with Department for Environment, Food and Rural Affairs (Defra) – £25m:

- Species Survival Fund.
- Green Recovery Challenge Fund.*
- Trees Calls to Action Fund.*

Programmes delivered in partnership with Welsh Government – £42.5m:

- Local Places for Nature.* **
- Local Places for Nature Breaking Barriers.*
- The Woodlands Investment Grant.**
- The Woodlands Investment Grant Tiny Forests.*
- Nature Networks.**

Programme delivered in partnership with Department for Culture, Media and Sport (DCMS) – £550,000, awarded 2022–2023:

- Know Your Neighbourhood (through Historic England High Street Heritage Action Zone Cultural Programme).*

All new funding programmes are subject to business case agreement by the Heritage Fund's Executive team.

*Programmes have awarded available grants and projects are being delivered.

**Programmes part funded by National Lottery.

Further information on the individual funding programmes can be found on our website.

Income and costs

We receive and award 20% of the National Lottery's good causes income and set our budgets for investment annually depending on the amount raised by National Lottery players across the UK. At any time, we have an active delivery priority of c.2,500 live projects, which is set out in the cash reserves and liabilities in our financial accounts.

In addition to National Lottery income, we receive annual UK government income for the National Heritage Memorial Fund of £5.4m, comprising £5.3m for grants and £0.1m for administration costs. We also receive income from governments and other bodies such as DCMS, Defra, the Northern Ireland Executive and Welsh

Government to distribute grants, as demonstrated above.

For the first three years of Heritage 2033, we aim to award over £1bn (see table below) with a portfolio comprising National Lottery Grants for Heritage as well as strategic initiatives and partnerships.

Projected investment	2023–2024*	2024–2025*	2025–2026	Total
Lottery income	£355m	£373m	£361m	£1,089m
Operating costs	-£28m	-£28m	-£28m	-£84m
Investment ratio balancing**	£88m	£54m	£98m	£240m
Total available for Lottery investment	£415m	£399m	£431m	£1,245m

*2023–2024 and 2024–2025 show actual figures.

**A change in the total investment to National Lottery Distribution Fund balance ratio has allowed for additional commitments over this planning period. The Heritage Fund operates within this threshold.

Our total National Lottery operating costs are set by DCMS and should not exceed 7.75% of annual National Lottery income over a three-year rolling period.

This is a living delivery plan that will be managed flexibly and will adapt over time to respond to external events and opportunities and as we develop our thinking with our stakeholders and partners.

Delivery priorities for 2025–2026

1: Grant funding delivery

Attract and invest in heritage projects that reflect our four investment principles and the ambitions set out in Heritage 2033, working with partners to increase the impact of support and funding for heritage in the UK. Successfully manage the pipeline of c.2,500 active National Lottery projects and wider grant in aid programmes.

2: Strategic initiatives

Develop and deliver the strategic initiatives established in Heritage 2033, being responsive to opportunities and events that help deliver the ambitions set out in our strategy.

3: Collaboration, partnerships and engagement

Advocate for Heritage 2033 and our distinctive role in driving impact for heritage, building relationships and collaborations with stakeholders across the UK which help deliver the strategic aims in Heritage 2033 and successfully launch, and communicate the impact of, new partnerships.

4: Impact and improvement

Continue to improve our organisational delivery, embedding the right skills, capabilities, resources, systems and culture to successfully deliver and measure the impact of Heritage 2033.

Alongside the core delivery of Heritage 2033 and support for the heritage sector, underpinning our work and departmental plans is a commitment to –

Embedding environmental sustainability in our National Lottery investment portfolio and internal operations:

- working collaboratively to learn from and share best practice across nature recovery, climate justice and climate adaptation
- reducing our environmental impact and working towards two net zero carbon ambitions:
  - deliver a decarbonisation plan to reach our medium-term goal of net zero carbon before 2030 for our operations, decarbonising our offices, travel, waste and purchases
  - reaching net zero by 2050 for our investments and grants (science-based target in line with the 2015 Paris Agreement)

We report on our environmental impact as part of our Annual Report and Accounts.

Championing and embedding equality, diversity and inclusion (EDI) in our workforce, governance, investment and operations:

- ongoing implementation of planned and new actions to build a valued and diverse workforce, which is more reflective of the diversity of the UK, including using data led decision making to enhance inclusive working practices
- developing partnerships and collaborative working to ensure equitable access to our funding for projects led by people under-served by heritage

We report on our workforce diversity as part of our Annual Report and Accounts.

We will effectively and efficiently use our resources to distribute National Lottery and government funding for heritage.

Governance and decision making

Board, committees and decision making

We are governed by a Board of Trustees who lead on strategy development, with day-to-day management delegated to the Chief Executive and Executive team. The Board makes final funding decisions on grant applications over £5m and holds a central investment budget for strategic initiatives and UK-wide programmes, drawing on the local expertise and recommendations of our area and nation committees.

We have six grant making committees – in Scotland, Northern Ireland and Wales, and three areas of England (North; Midlands and East; London and South) – that decide on grant requests between £250,000 and £5m. Together with decisions made by our operational teams on grants under £250,000, these locally based committees and staff account for just under 97% of all our funding decisions. This highly devolved approach ensures the vast majority of our grant making is informed by deep local knowledge and made close to the communities we support.

We retain a ‘country reserve’ for Scotland, Wales and Northern Ireland for grants that cannot be accommodated in delegated per capita budgets.

Allocated on a per capita basis, grant making committees receive the following percentages of delegated budgets:

Area/nation	Budget
Northern Ireland	2.9%
Wales	4.8%

Area/nation	Budget
Scotland	8.4%
England, North	23.7%
England, Midlands and East	25.2%
England, London and South	35%

The processes for grant applications, decision making and monitoring are set out on our website.

Managing risks

Our risk register is regularly reviewed by the Executive team, the Board and the Audit and Risk Committee. Our risk appetite is reviewed and approved by the Board once a year.

Our main risks and mitigations for the third year of the delivery plan, 2025–2026, at the date of publication are:

Strategic

Implementation of new strategy slower than planned or fails to deliver against the four investment principles. We will manage this through:

- staff and committee training to ensure consistency of approach across the UK
- management information to inform delivery and refocus of activity as needed
- implementation and reporting on impact through introduction of formal Impact Framework
- oversight by Board and Executive teams

Insufficient data, insight and expertise to track and understand the strategic impact of Heritage 2033. We will manage this through:

- active improvement of data sources and tracking of delivery progress through development of our investment management system
- delivery of new Impact Framework to measure and respond to evidence of our impact
- recruitment and development of staff members with appropriate skills

Impact on Heritage Fund pipeline if existing projects incur major problems or fail, or new applications do not come forward due to economic risks. We will manage this through:

- active monitoring of projects in line with our guidance and building relationships with grantees to identify issues early
- targeted use of external experts to better inform award decisions
- improving understanding of funding landscape and individual project risks by both assessors and decision makers
- active marketing and engagement planning

Economic and political

Fluctuations in the external environment lead to different funding and policy priorities for the heritage sector. We will manage this through:

- close working relationships with stakeholders including DCMS sponsor team to demonstrate the contribution of investment in heritage
- reinforce our approach to devolved engagement and decision making

- ensure our strategy is flexible and adaptable through three-year delivery plans and budgeting with annual reviews

Sustained material fall in National Lottery income means we cannot fund key projects to deliver our strategy. We will manage this through:

- joint working with National Lottery Promotions Unit to strengthen good causes marketing
- scenario planning for a range of financial options
- collaborative working with the National Lottery operator, Allwyn, through the National Lottery Forum to share insight

Operational

Failure to attract and retain diverse and skilled workforce leads to reduction in key knowledge and reduces delivery, capability and effectiveness. We will manage this by:

- continuing to improve recruitment processes including widening recruitment channels, staff induction and onboarding processes
- developing relevant staff training and learning opportunities
- developing our employee value proposition
- reporting and benchmarking of key workforce demographics

Major sustained outage of systems or functions, compromise of data security. We will manage this through:

- preventative access controls and detection tools
- monitoring and reporting software activity
- business continuity and critical incident plans in place
- staff training and awareness programme
- data security and policies in place and reviewed regularly

Transparency

We recognise our obligations to National Lottery players and taxpayers in explaining how we use their money, and funding working in compliance with relevant laws and the Framework Document with DCMS.

As a public-facing body, we are committed to making information readily available and easy to understand. For more information, please see the Transparency section of our website.

Our award data is published through GrantNav, which is an open data standard, on our website and through DCMS and Cabinet Office statistical releases. We publish details concerning individual grant awards which may be considered to be subsidies to comply with the transparency requirements in the Subsidy Control Act 2022.

We also publish on our website the following:

- our Annual Reports and Accounts which include senior staff salaries
- our Board and committee decisions on grant applications
- our governance structures and details of our trustees, committee members and senior staff
- our 10-year strategy, Heritage 2033
- opportunities for jobs and working with us including committee membership and trustee vacancies when they arise
- workforce equality information to comply with equality legislation

- details of all grant programmes with guidance on how to apply, requirements and links to our online portal for submitting applications
- how we work with you to deliver your project and outcomes
- other corporate information

Tenders worth £30,000 (inclusive of VAT) or more where we are seeking suppliers/business partners to help us deliver our business are advertised on Contracts Finder. Tenders over the Public Contracts Regulations 2015 thresholds are also advertised on the Find a Tender service on the government website. Contracts awarded for services and support where we have let those contracts are published (redacted) on Contracts Finder.

Impact and performance

Assessing the impact of our investment

Heritage 2033 describes the changes we want to achieve by 2033 across our four investment principles.

During the transition year (2023–2024), we started to design a new Impact Framework that will allow us to evaluate and assess our impact over the next 10 years.

Our Board has agreed a framework to evaluate impact on **pride in place**, **revived heritage** and **the economy**, linked to our four investment principles:

- Saving heritage: heritage is revitalised and its condition is improved.
- Protecting the environment: natural heritage is in recovery.
- Inclusion, access and participation: more people can access and connect to heritage.
- Organisational sustainability: organisations we fund are more skilled and financially secure.

Over 2025–2026 we will introduce qualitative and quantitative measures to understand if we are delivering against each of these statements and to respond accordingly. We are particularly interested in demonstrating how the Heritage Fund is impacting pride in place, revived heritage and the economy.

We will continue to make all our research, insight and evaluation available via our website to enable a full assessment of our impact for heritage. We will continuously improve our approach to measuring and monitoring the impact of our investments.

Measuring our performance

We will continue to produce and review operational indicators to measure our performance through our reporting to our sponsor department, DCMS. These indicators sit alongside the longer-term Impact Framework. Our current operational indicators are:

- a reduction in heritage assets considered to be ‘at risk’ as a direct result of Heritage Fund investment
- the proportion of grant applications processed within the published timeframe
- the proportion of the public who engage with heritage, museums and galleries recorded in DCMS’s Participation Survey
- the amount and proportion of funding to the 20% most deprived local authority areas

We will be making improvements to how we collect data on the impact of projects so we can also monitor and report the number of jobs and volunteers directly supported by Heritage Fund investment.

Our service standards

We have set targets for the delivery of services to our applicants and grantees.

Application decisions

Decisions will normally be taken at the next available decision meeting following assessment as follows –

National Lottery Heritage Grants over £250,000:

- Expression of Interest response: 20 days
- development/delivery grant application: 12 weeks

National Lottery Heritage Grants up to £250,000:

- from application: eight weeks

Grant payments

Grant payments will be made to the grantee within nine working days from our receipt of the payment request.