Heritage 2033 delivery plan: 2026–2029

Our vision for heritage

Introduction

In 2023 we set out our 10-year strategy, Heritage 2033, to invest £3.6billion raised for good causes by National Lottery players to make a decisive difference for people, places and communities. Our long-term approach was designed to allow us to respond to a changing world and support communities across the UK to connect with their heritage. We committed to publishing three-year delivery plans to outline how we'd do this. This is our second delivery plan, guiding our work from 2026 to 2029.

Heritage 2033 – the first three years

In the first three years of Heritage 2033 we:

- rolled out streamlined National Lottery Heritage Grants, supporting a wide range of heritage projects which reflect our four investment principles
- introduced a higher grant threshold of £10million, allowing larger-scale investment in transformational heritage projects
- supported 1,750 projects with £885m of investment
- launched five new strategic initiatives aimed at tackling long-term heritage challenges at scale, including:
    - Heritage Places: investing at least £200m over 10 years to boost pride in place and connection to heritage
    - Landscape Connections: investing at least £150m over 10 years for the UK's most treasured landscapes
    - Nature Towns and Cities: a new partnership and at least £15m of funding to improve urban green spaces
    - Places of Worship: investing at least £15m in strategic projects to save heritage in need for communities across the UK
- celebrated the 30th birthday of the National Lottery and its extraordinary impact on life and heritage across the UK

We've already made significant progress towards delivering the ambitions of our four investment principles: saving heritage; protecting the environment; inclusion, access and participation; and organisational sustainability.

In the first delivery period (2023–2026) of our strategy, we launched a new, streamlined National Lottery Heritage Grants process, supporting 4,125 grant applications from every corner of the UK. We've committed £885m of National Lottery funding to 1,750 projects to support the places, collections, cultures and memories from the past that people value and want to pass on to future generations.

We also launched five strategic initiatives and have already committed over £134m to 89 grants supporting long-term heritage challenges. This strategic investment is helping embed heritage in the plans of towns, cities and areas across the UK; improving access to, and the quality of, our natural heritage; supporting outstanding heritage such as places of worship; and addressing common, sector-wide challenges.

We've invested in programmes that allow people to preserve and enjoy the heritage that matters to them, including working with the Architectural Heritage Fund to support 19 Heritage Development Trusts which empower communities, charities and heritage groups to reimagine and repurpose their heritage buildings. We've supported organisations including museums and volunteer-led nature groups to work in new and sustainable ways, both through National Lottery Heritage Grants and our dedicated Heritage Innovation Fund. And we've worked with local communities and businesses to give new life to much-loved heritage landmarks through our Heritage Enterprise programme.

Heritage 2033 – the next three years

Over the next three years we will:

- invest a total of around **£1.46bn** in heritage
- invest **over £130m** in strategic initiatives
- invest **at least £20m** in projects aimed at engaging young people in heritage
- deepen investment in the **places that need it most**
- make approximately **95%** of grant decisions in the area or nation where the applicant is based
- continue to make funding for heritage available in every local authority in the UK

As the largest funder for the UK's heritage, operating across England, Scotland, Wales and Northern Ireland, we're uniquely placed to continue to help people access heritage and tell their stories. Over the next three years, around 95% of our grant decisions will continue to be made locally, by staff and committees based in our three English areas and across the three devolved nations. We'll also continue to invest in strategic initiatives that support heritage at scale, from landscape recovery to youth engagement and skills development, for now and the future.

Applicants, grant recipients and partners have told us they value the flexibility and simplicity of Heritage 2033. And the publication of our first impact report demonstrates that the projects we've funded to date are strongly supporting our investment principles. We know that meaningful heritage impact requires long-term commitment, but already at this early stage, our stakeholder feedback and impact data is giving us confidence that we're on the right track, and we remain committed to four delivery priorities: grant funding; strategic initiatives; collaboration and partnerships; and impact and improvement.

As we build on the progress we've made since 2023, we'll remain agile, responding rapidly to changing external circumstances and meeting the emerging needs of communities. In this delivery plan you'll see evidence of both continuity and adaptation, including:

- plans for further investment in the places that are most in need of support to develop their heritage, including but not confined to our existing 15 Heritage Places
- additional support aimed at young people to help them engage with heritage and build long-term skills which support heritage in the future
- investment in access and growth by supporting innovative projects which create volunteering, employment and training opportunities, and which reuse historic buildings
- help for organisations to adapt to the challenges of global instability so they are resilient enough to protect and make accessible our outstanding heritage for the long term

We look forward to working with you to deliver this next phase of Heritage 2033.

– The National Lottery Heritage Fund Board of Trustees

How we work

Our vision

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

To achieve this, our strategy is supported by three-year delivery plans. This approach allows us to be flexible, adapt to heritage sector needs and respond to external events and opportunities over the 10 years of Heritage 2033.

This delivery plan sets out our key milestones and how we will invest National Lottery money across 2026–2029. It's updated annually as part of our business planning process.

Our investment principles

Our four investment principles are at the heart of our ambitions for heritage and are the foundation of all our grant decisions:

- **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.

Our approach

Most of our Heritage 2033 funding is delivered through National Lottery Heritage Grants. They're designed to be broad and inclusive and can support a wide range of heritage projects that reflect local needs and aspirations. We aim to continuously improve our customer application and grant delivery process through regular user research and other feedback.

To ensure we're fulfilling our vision to invest for the future as well as the present, and across places as well as individual projects, we also invest in:

- **strategic initiatives** that address large-scale or cross-territory challenges, with a focus on place, landscape and nature, heritage in need and responding to opportunities and emergencies
- **partnerships** that bring together expertise and resources, creating more powerful and lasting impact

Our values

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

- **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, we have the privilege of investing money raised by National Lottery players to support projects across the UK that connect people and communities to their heritage. We award 20% of the good causes income raised by National Lottery players. We also distribute heritage funding that aligns with our vision and investment principles on behalf of the UK and devolved governments.

We are a non-departmental public body accountable to Parliament via the Department for Culture, Media and Sport (DCMS). This department sets our Policy directions for the UK and for England, and we also have Policy directions from the devolved governments in Scotland, Wales and Northern Ireland (Northern Ireland Policy directions are waiting ministerial approval).

Our decisions about individual applications and policies are entirely independent of the government.

We have teams and committees working across England, Scotland, Wales and Northern Ireland and 95% of our grant decisions are made locally, by people who live and work in the communities we fund.

The Board of 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.

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Setting the context

The insight shaping our next steps

Drawing on several sources of insight and evidence, we've reflected on how we're moving towards the ambitions set out in Heritage 2033 after our first three years.

Evidence about our impact

Many of our grants aim to achieve long-term transformational change, so it can take time to measure the full impact of our investment. But the early signs are positive. Our first impact report demonstrates that the projects we've supported through the first three years of Heritage 2033 are already creating benefits for people, places and the environment. For example, making heritage sites more accessible, connecting communities to their landscapes and history and creating opportunities for jobs, volunteering roles and training and skills.

Across this three-year delivery plan, we'll collect even more data to demonstrate our impact on the jobs, apprenticeships and volunteering opportunities our projects create and about how they engage young people, support communities and transform places for the long term.

Feedback from stakeholders

Insights from our stakeholders and partners, including grant applicants and recipients, are also helping us learn and adapt the delivery of Heritage 2033 as the external landscape continues to change.

We heard from our stakeholders that Heritage 2033 offers a strong and ambitious vision and they welcomed the clarity and simplicity of our investment approach. You've also told us where you want us to go further to meet the challenges that heritage faces, including strengthening organisational resilience, supporting adaptation to a changing climate and investing in places to deliver positive outcomes for people, communities and the natural environment. We're committed to working collaboratively to build the partnerships that help deliver lasting impact for heritage.

In conversations with applicants, grantees and other stakeholders last year, we heard that:

- “The Heritage Fund has an uncanny knack in achieving strategic, scalable changes where other funders are not.”
- “[The] Place-based approach seems to be working… [the Heritage Fund is] actively involved in growth strategy discussions and inclusion of heritage and nature.”
- “The Heritage Fund’s role as a convenor has been really important.”
- “The Heritage Fund should be part of conversations due to the almost unique perspective they have of the sector.”

A changing world – social and political context

Heritage 2033 was designed to be ambitious and flexible. Since we launched the strategy in 2023, we’ve seen continuous change at a local, national and international level impacting the people, communities and places we support.

In shaping this delivery plan, we considered:

- **Persistent but unpredictable financial pressures**, driven by a range of causes, from international instability to ageing infrastructure, resulting in cost inflation and increased competition for funding.
- The **impact of climate change on the built and natural environment**, which can result in damage and/or significant change to historic buildings and protected landscapes, habitats and species.
- The **rapid pace of digital change**, including how machine learning and the use of artificial intelligence (AI) is changing the way we interact with each other, how funders work with grantees and how our grantees work with their heritage assets and audiences.
- A shift to greater **place?based investment and community?led decision making as well as the reuse of assets for communities**, grounded in local evidence and experience that show the impact on long?term change. National policy developments, such as the UK government’s Pride in Place programme and local devolution, reinforce this direction.
- A growing focus on the **wellbeing of young people** so they can benefit now from engaging with heritage and have equitable access to develop skills to become custodians of heritage in the future. We’ve already reflected this in our new children and young people good practice guidance , which aligns with the UK government’s Youth Strategy, Youth Matters.

Contributing to the UK government’s strategic aims

We'll use our unique position as the largest funder for the UK's heritage to support the government's vision for the UK to be more self-confident, where every community in every place feels and sees that their lives are richer and their contribution is valued within an inclusive national story.

To do this we'll invest through National Lottery Heritage Grants in projects that contribute to the Secretary of State for Culture, Media and Sport's priorities:

- Growth and good jobs in every place where we invest – through the regeneration of high streets and town centres, helping the sector meet skills gaps and supporting people from all backgrounds to develop rewarding careers in heritage.
- Richer lives with choices and opportunities for all – through helping people shape shared identities across communities and building pride in place.
- A more socially cohesive country with an inclusive national story – through valuing, caring for and sustaining the heritage that matters to people in communities in every part of the UK.

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Heritage 2033 delivery plan: 2026–2029

Our plan for 2026–2029

Our insight, evidence and your feedback have confirmed that we're on the right track to achieve the ambitious goals of Heritage 2033. We remain committed to the four priorities that will help us continue to deliver this across 2026–2029:

- **Grant funding**: strengthening resilience and relevance through investment.
- **Strategic initiatives**: driving large-scale impact through targeted interventions.
- **Collaboration, partnerships and engagement**: amplifying impact through working with others.
- **Impact and improvement**: delivering with insight and innovation.

What we'll invest

Total National Lottery investment across the three years of this delivery plan is projected to be £1.46billion*. We'll also distribute non-Lottery funding, including from UK governments, to support and strengthen heritage across all four nations.

How we plan to invest that money over the next three years is set out below. Budgets are indicative for years two and three, based on National Lottery income forecasts provided by the National Lottery operator, Allwyn. Forecasts are subject to change and plans are reviewed annually throughout the three years and updated as necessary to meet strategic priorities.

Total projected National Lottery investment

Our investments	Year 1 2026–2027	Year 2 2027–2028	Year 3 2028–2029	Total 2026–2029
National Lottery Heritage Grants	£385.5m	£358.9m	£359.2m	£1.1bn
Strategic initiatives	£45m	£45m	£41.9m	£131.9m
Flexible budget*	-	-	-	£233m
Total National Lottery budget	£430.5m	£403.9m	£401.1m	£1.46bn

*This flexible budget allows us to respond to emerging needs and priorities across the three years.

Grant funding – strengthening resilience and relevance through investment

We'll support heritage to be more resilient and relevant to communities across the UK by continuing to invest in projects that deliver all four of our investment principles and the ambitions set out in Heritage 2033.

Headlines from the first three years include:

- awarded £885m to 1,750 projects
- supported 4,125 grant applications through the transition to deliver National Lottery Heritage Grants under the four Heritage 2033 investment principles and new grant thresholds
- streamlined our application, assessment and post-award processes

In the next three years we will:

- attract a strong pipeline of projects of all sizes between £10,000 and £10m through our marketing and engagement work, monitoring success rates and providing equitable access to funding across the UK
- use our grant funding to complement DCMS priorities and funded initiatives for heritage such as Places of Worship Revival Fund and Heritage Revival Fund, supporting strategic investment in places, assets and communities
- support cross-cutting, strategic projects with potential to be transformational for the sector, as well as projects rooted in particular places or types of heritage
- continuously improve our application, assessment and post-award processes

In 2026–2029 we will

Contribute to an inclusive national story

Years 1–3:

- Work with the National Lottery family to share stories of the people and places across the UK that have benefitted from our funding.
- Celebrate how the money raised for good causes by National Lottery players helps safeguard heritage, strengthen communities and power creativity across the UK.
- Take an active role in UK?wide moments of celebration and gratitude, such as National Lottery Open Week, Heritage Treasures Day and Crossed Finger Selfie Day.

Improve the grant experience

Year 1:

- Deliver an end?to?end grants process that is simple and streamlined.
- Launch refreshed applicant guidance which fully reflects the investment principles and the grant journey.
- Publish new good practice guidance about digital and working with children and young people.
- Develop our approach for strategic applications which address investment principles beyond single geographies, organisations or heritage assets.

Years 2 and 3:

- Continuously improve and embed the grant experience through testing with applicants and learning from best practice.
- Refresh and keep applicant guidance up to date through regular review and learning.

Drive long-term organisational resilience

Year 1:

- Conduct research on the impact of our capital funding over past 5–20 years and how it’s strengthened heritage organisations’ sustainability.
- Explore the potential for an online tool to help organisations understand their resilience.

Years 2 and 3:

- Apply learning from our capital funding research.
- Potentially pilot an online tool and, subject to positive outcomes, roll it out to all applicants and grantees.

Manage our investment portfolio risk

Year 1:

- Gather data about the drivers of financial and delivery risk in our investment portfolio to manage it effectively.

Years 2 and 3:

- Gather data about the drivers of financial and delivery risk in our investment portfolio to manage it effectively.

Strategic initiatives – driving large-scale impact through targeted interventions

We'll tackle long-standing heritage issues at scale, support cross-territory approaches and accelerate new ideas and innovation. We'll engage with partners and communities to identify emerging opportunities and challenges and ensure our budget planning is flexible enough to respond.

Headlines from the first three years include:

- committed investment of over £380m across the 10 years of the strategy, with £134m already committed to 89 projects
- launched five strategic initiatives to support thriving places, urban nature recovery, to connect landscapes and address challenges faced by places of worship and archives

In the next three years we will:

- invest at least a further £130m in strategic initiatives
- identify and target support at heritage in need, including places of worship, historic ships and museum collections
- work with DCMS and other National Lottery funders to support the UK's next city and town of culture
- embed learning from our investment in urban green spaces and large-scale landscapes and invest in further support for these types of projects
- deepen investment in the places that need it most

In 2026–2029 we will

Place

Our place-based approach across our investment portfolio has a focus on areas with both heritage opportunity and demonstrable socio?economic need among local communities. We will track and report on our investment in areas of double disadvantage with high deprivation and lack of social infrastructure.

Heritage Places

Longer-term place-based investment targeting areas, towns and cities with heritage need, opportunity and potential.

Year 1:

- Work with the existing 15 Heritage Places to increase the capacity of local heritage to contribute to their place, people’s connection with their heritage and ensure effective delivery of locally developed projects.
- Strengthen the relationships between Heritage Places, including at least one in-person peer network meeting, so they can share insight and build collective expertise.
- Publish the second stage of independent evaluation of Heritage Places.

Years 2 and 3:

- Deepen and sustain the impact for the 15 Heritage Places through continued engagement, supporting long-term investment and building local capacity.
- Strengthen connections between Heritage Places through supporting their peer network and shared evaluation.
- Publish evaluation and research that strengthens wider understanding of effective place-based heritage investment.

Nature Towns and Cities

A partnership providing support and funding to improve the quality of, and access to, urban green spaces.

Year 1:

- Continue work with the 19 towns and cities awarded funding to build local capacity to put nature at the heart of their thinking for the future and to allow everyone to access nature close to home.
- Work with partners including the National Trust, Natural England and sister nation-based nature agencies to scale the initiative and create a learning network that connects and influences across the UK.

Years 2 and 3:

- Track delivery in the 19 funded towns and cities and monitor impact.
- Share learning across the cohort of projects, using emerging insights to strengthen delivery and inform other similar strategic system-change investments.
- Work with national partners to grow and shape the ongoing direction of Nature Towns and Cities.

Landscape Connections

Helping world-class landscapes across the UK become better for nature and people.

Year 1:

- Build on the existing investment in 13 designated protected landscapes.
- Target engagement with partners in landscapes with fewer resources but greatest need, to ensure funding is accessible to all.
- Support peer learning across projects and encourage collaborative approaches.
- Establish an evaluation framework, data collection and methodology for monitoring landscape change.

Years 2 and 3:

- Grow and strengthen our investment in protected landscapes, increasing the number of projects and ensuring reach across the UK.
- Support the cohort of landscape projects, enabling knowledge transfer from the most established projects to those with greatest need.
- Support data collection for monitoring and evaluation, applying early learning to refine the long?term approach.

Heritage in Need

Saving heritage in need and tackling sector challenges, informed by evidence from partners and communities.

Places of Worship

Investment in projects that have a strategic impact at a regional or national level for places of worship.

Year 1:

- Continue to support more places of worship through National Lottery Heritage Grants.
- Evaluate existing strategic projects to understand their impact.
- Share learnings and identify any gaps in provision emerging from our evaluation.

Years 2 and 3:

- Work with sector partners to identify additional opportunities for strategic investment in places of worship.
- Continue to support more successful applications for places of worship through National Lottery Heritage Grants.

Historic Ships

Strengthening resilience across the historic vessels sector.

Year 1:

- Support National Historic Ships UK to establish a clear national framework for prioritising risk and significance across the historic ships sector.

Years 2 and 3:

- Invest in projects which deliver coordinated UK-wide support by improving access to expertise and skills and target funding to reduce risk and strengthen resilience in the historic vessels sector.

Museum Collections and Resilience

A new area of focus for Heritage in Need, recognising the particular pressures on UK museums and their collections.

Year 1:

- Publish research into museum collections and resilience.
- Develop a targeted intervention, to be delivered in collaboration with sector support organisations, that reflects the planned new Museums Strategy in England, alongside sector priorities in the devolved nations.

Years 2 and 3:

- Work with sector partners across the UK to introduce interventions to support long-term collection management and resilience.
- Embed learning to support long-term sector resilience.

Acquisitions, opportunities and emergencies

We will consider how to support the UK's archives sector, building on the learning from Archives Revealed, our current project with The National Archives, The Pilgrim Trust and the Wolfson Foundation.

We will remain open to respond to emerging needs or opportunities.

UK Town of Culture (2028) and UK City of Culture (2029)

Years 1–3:

- Support successful UK Town of Culture and City of Culture with heritage grant applications, project development and delivery.

Partnership, collaboration and engagement – amplifying impact through working with others

We will work through partnerships and wider networks to benefit heritage, providing greater value for people, communities and places by understanding and responding to local needs and priorities.

Headlines of the first three years include:

- distributed over £63m of government funding in partnership with the Department for Environment, Food and Rural Affairs (Defra), DCMS and the Welsh Government, including:
  - creating and restoring wildlife-rich habitats in England (Species Survival Fund, Defra)
  - strengthening the resilience of protected land and marine sites in Wales (Nature Networks Fund, Welsh Government)
- supported innovative partnership approaches including £31m committed to Heritage Enterprise projects, giving new life to neglected historic sites
- invested in over 90 projects with community grants, allowing targeted support for smaller, grassroots organisations at a local level
- launched the final phase of our Heritage Innovation Fund, awarding £2.9m to 13 organisations to develop innovative solutions to workforce issues

In the next three years we will:

- prioritise interventions with partners to invest in heritage projects that support opportunities for children and young people, develop heritage skills, improve financial sustainability and deepen expertise and understanding of climate risk for heritage
- support and encourage the co-design of heritage projects which meet local and community needs
- develop new strategic partnerships to deliver investment models such as co-created funding opportunities and delegated grants
- strengthen collaboration with the devolved governments, local authorities and, in England, mayoral strategic authorities, as well as other Lottery distributors

In 2026–2029 we will

Support for children and young people

Invest at least £20m in projects targeted at young people, recognising their vital role in shaping and sustaining the future of heritage.

Year 1:

- Develop our approach for investment in heritage for young people, focused on maximising opportunity and impact.
- Explore partnerships between heritage organisations and at least one organisation specialising in reaching young people in each of England, Scotland, Wales and Northern Ireland.
- Identify ways to build more opportunities for young people into National Lottery Heritage Grants projects.

Years 2 and 3:

- Support partnerships to make successful applications, resulting in at least one large youth-focused project in development or delivery in each of England, Scotland, Wales and Northern Ireland.
- Track the number of National Lottery Heritage Grants-funded projects which engage young people.
- Establish cohorts to create high-quality opportunities at scale for children and young people, prioritising those least likely to engage.

Develop sector skills

Collaborate with others to meet sector skills needs.

Year 1:

- Following a review of the UK skills landscape, we'll identify actions to address ongoing challenges, assess where we are not receiving applications and better understand the opportunities to partner on strategic interventions.

Years 2 and 3:

- Work with partners to develop and launch pilot interventions that test ways of addressing gaps and growing skills across the heritage sector.

Drive heritage-led regeneration

Unlock the potential of heritage assets to drive economic, social and cultural renewal.

Year 1:

- Refresh and re-launch our Heritage Enterprise grants, working with entrepreneurial heritage organisations and commercial partners to bring heritage assets back into use.

Years 2 and 3:

- Promote, monitor and improve the use of Heritage Enterprise alongside other forms of support, such as social investment.

Strengthen the tools of social investment

Explore opportunities for further social investment partnerships which benefit heritage.

Year 1:

- Continue to partner in social investment funds, including the Arts and Culture Investment Fund and Heritage Impact Fund.
- Explore opportunities for further alternative finance partnerships which benefit heritage.

Years 2 and 3:

- Maintain, increase and develop new social investment and alternative finance opportunities.

Non-Lottery funded partnership programmes:

Source of funding	Funding programmes	Activity in 2026–2029:
Programmes delivered in partnership with **Defra**	Species Survival Fund*	Projects in delivery and monitoring. Programme closes in 2026–2027.
Programmes delivered in partnership with **Welsh Government**	Nature Networks Fund Local Places for Nature*^ The Woodlands Investment Grant*^??	£10m funding available for 2026–2027. Programme closes in 2026–2027. In monitoring.
Programmes delivered in partnership with **DCMS**	?War memorials funding ?	£2m funding available. Details to be announced in 2026–2027.

More opportunities to work in partnership with governments to help deliver the ambitions of our strategy may arise in time. All new funding programmes are subject to business case agreement by our Executive team.

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

^Programmes part-funded by National Lottery.

Impact and improvement – delivering with insight and innovation

We'll strengthen operational delivery, ensuring efficient and effective systems and improving the measurement of the impact of Heritage 2033.

Headlines of the first three years include:

- improved our internal and external systems, including our grant application system, to help applicants navigate a clearer, simpler process
- introduced a new framework to evaluate and assess the impact of Heritage 2033 over its 10 years
- scoped innovative ways of supporting applicants, the sector and organisational capacity through investment in AI and upskilling our workforce

In the next three years we will:

- build deeper insight into what drives long?term impact from National Lottery investment through smarter, proportionate data collection and project evaluation
- invest in digital and AI tools and training to improve our customer experience and support the sector
- aim to reduce the environmental impact of our investment in heritage
- provide training and employment opportunities which develop a diverse heritage sector, through programmes including Future Heritage Leaders, Windsor Fellowship and Change100

In 2026–2029 we will

Measure our impact

Develop the evidence base for our impact framework.

Year 1:

- Introduce new data collection points into the grant journey.
- Review and adopt approaches to measuring economic impact, aligning with DCMS's Culture and Heritage Capital programme.
- Carry out in?depth reviews of selected larger capital projects from across the UK to understand their challenges, achievements and long?term impact.

- Introduce a new approach to project evaluation.

Years 2 and 3:

- Ensure data collection is fully embedded in the grant process so we capture the right insights at every stage.
- Implement a new approach to project evaluation for grantees, with long-term follow-up on key projects to track impact over time.
- Publish a full impact report in year three.

Transform our services and infrastructure

Invest in digital transformation to improve the customer experience.

Year 1:

- Develop an internal Technology Programme Board to oversee our digital and AI roadmap.
- Approve a three-year action plan for AI piloting and adoption including identifying where AI can improve the experience for applicants and grantees.
- Commission external AI expertise to support us and strengthen capability across the heritage sector.

Years 2 and 3:

- Deliver technology upgrades that support Heritage 2033 and streamline our operational and funding processes.
- Pilot AI-powered tools to enhance productivity and improve the grant process, sharing insights and learnings with the heritage and wider grant-making sector.

Environmental impact

Reduce the negative environmental impact and carbon footprint of our investment in heritage and support the heritage sector to adapt to climate change.

Year 1:

- Improve the quality of data used to estimate the carbon footprint of our investments to inform the next steps in improving and evolving the approach to measuring our funding portfolio.
- Pilot methods to improve environmental data collection at the end of projects.
- Champion and promote the support for climate adaptation available through National Lottery Heritage Grants.

Years 2 and 3:

- Implement a roadmap to improve and update the accuracy of our carbon footprint measurement approach. Identify insights and gaps.
- Measure progress towards collecting structured environmental data on our funding activity and outputs.
- Use lessons learned to inform project engagement and development to actively reduce negative environmental impact.
- Work with partners to share best practice and support heritage organisations better plan for and adapt to the changing climate.

Income and costs

We award 20% of the National Lottery's good causes income and set our investment budgets annually based on the amount raised by National Lottery players across the UK. At any time, we are monitoring in excess of 2,000 live projects, which is set out in the cash reserves and liabilities in our financial accounts.

In addition, we receive annual UK government income for the National Heritage Memorial Fund of £5.3m (£5.2m for grants and £0.1m for administration costs). We may also receive income from governments and other bodies, such as DCMS, Defra, the Northern Ireland Executive and Welsh Government, to distribute grants.

Across 2026–2029, we aim to invest over £1.46bn through a portfolio of National Lottery Heritage Grants, strategic initiatives and partnerships.

Projected investment for 2026–2029	**2026–2027**	**2027–2028**	**2028–2029**	**Total**
National Lottery income	£379m	£498.2m	£546m	£1.42bn
Operating costs	£29.4m	£38.6m	£42.3m	£110.3m
Investment ratio balancing*	£155.1m	Nil	Nil	£155.1m
Total available for National Lottery investment	£504.7m	£459.6m	£503.7m	£1.46bn

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. We consistently operate within this threshold.

*A change in the total investment to the National Lottery Distribution Fund balance ratio, agreed by our Board in December 2023, has allowed for additional commitments over this planning period.

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Governance

Board, committees and decision making

We're governed by a Board of Trustees that leads 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 staff and committees.

We have six grant making committees – in Scotland, Wales and Northern Ireland, and three areas of England (North, Midlands and East, London and South) – that decide on grant requests between £250,000 and £5m. These committees are made up of local people passionate about the heritage in their area, appointed through open, competitive recruitment, who collectively bring a wide range of expertise and insight to our grant making. Committees are now attended by our Future Heritage Leaders, young adults aged 18–30 who bring new perspectives to our decision making. Together with awards made by our Heads of Investment on grants under £250,000, this means that area and nation-based committees and staff account for 95% of all our funding decisions. This approach ensures that our grant making is informed by heritage expertise, local knowledge and is connected and responsive to the places and communities we support.

We retain a 'country reserve' for Scotland, Wales and Northern Ireland for larger grant applications that can't 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 committees	Delegated budget share
England, London and South	35%
England, Midlands and East	25.2%
England, North	23.7%
Scotland	8.4%
Wales	4.8%
Northern Ireland	2.9%

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

Transparency

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

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

Managing risks

Our risk register is regularly reviewed by our 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 2026–2029 (as at publication in summer 2026) are summarised below.

Strategic risks

Implementation of the strategy is slower than planned or fails to deliver against the four investment principles

How we'll manage this:

- Ongoing training for staff to ensure consistency across the UK, which is being revised and refreshed.
- Regular review of our online Investment Management Service improvement programme.
- Monitoring of the extent to which funded projects meet our investment principles through analysis of application and grant data.

Insufficient data, insight and expertise to track and understand the strategic impact of Heritage 2033.

How we'll manage this:

- Implementation of the impact framework to measure and respond to evidence of our impact.
- Make changes as needed to the end-to-end grant journey to support collection of consistent, high-quality impact data at every stage.

Impact on our funding pipeline if existing projects incur major problems or fail, or new applications do not come forward due to economic risks.

How we'll manage this:

- Active monitoring of projects in line with our guidance by building relationships with grantees to identify issues early.
- Targeted use of external experts to better inform grant decisions.
- Improved understanding of the funding landscape and individual project risk by both assessors and decision makers.
- Support for organisations carrying out resilience projects prior to commencing substantial investments.

Social, economic and political risks

Fluctuations in the external environment lead to different funding and policy priorities for the heritage sector.

How we'll manage this:

- Close working and alignment with other heritage and culture arm's length bodies and National Lottery distributors.
- Strong relationships with DCMS, Whitehall, devolved governments, mayoral strategic authorities, the local government sector and other stakeholders.
- Measuring and communicating the impact of our investment in heritage.

Sustained material fall in National Lottery income means we cannot fund key projects to deliver our strategy.

How we'll manage this:

- Regular monitoring of income forecasts.
- Joint working with Allwyn and the National Lottery Promotions Unit to strengthen good causes marketing.
- Close monitoring of project progress.
- Scenario planning for a range of financial options.

Operational risks

Failure to attract and retain a diverse and skilled workforce leads to reduction in key knowledge and reduces delivery, capability and effectiveness.

How we'll manage this:

- Staff training and learning opportunities.
- Strong employee offer to aid recruitment and retention.
- Reporting and benchmarking of key workforce demographics.

Major sustained outage of systems or functions or compromise of data security.

How we'll manage this:

- Preventative access controls and detection tools.
- Monitoring and reporting software.
- Business continuity and critical incident plans in place.
- Systems segregation, staff training and awareness.
- Data security and policies in place and reviewed regularly.

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Next Impact and performance

Heritage 2033 delivery plan: 2026–2029

Impact and performance

Evidencing our impact

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

We're committed to understanding our impact so we can demonstrate progress towards our vision for heritage and adapt to challenges and opportunities during the 10-year life of the strategy. Our impact framework helps us measure and collect evidence about the difference our funding makes.

The framework evaluates 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.

We'll continue to introduce qualitative and quantitative measures to understand if we're delivering against each of these statements and report and respond accordingly. We're particularly interested in demonstrating how National Lottery investment is impacting pride in place, revived heritage and the economy. Evidence and reports on our impact will be published on our website.

We also review our work in relation to the Policy directions for the UK, England and the devolved governments in Scotland, Wales and Northern Ireland.

Measuring our performance

We'll report to our sponsor department, DCMS, on key performance indicators (KPIs) which are linked to the DCMS strategy and sit alongside our Heritage 2033 impact framework and internal operational reporting. Those KPIs are:

- A reduction in heritage assets considered to be 'at risk' as a direct result of Heritage Fund investment.
- The proportion of applications a) under £250,000 and b) over £250,000 which are processed within our published timeframes.

- The proportion of the public in England who engage with heritage, museums and galleries.
- The number of volunteers directly supported through Heritage Fund investment.
- The number of new a) jobs and b) apprenticeships directly supported by Heritage Fund investment.
- The proportion of awards and funding to the 20% most deprived local authority areas in the UK.
- The proportion of awards and funding to the 20% most 'doubly disadvantaged' local authority areas in England.
- The number of projects supported by the Heritage Fund serving children and young people.
- The proportion of local authorities with Heritage Fund funding (under Heritage 2033).

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 10 working days from our receipt of the payment request.

Explore our previous delivery plan for 2023–2026.

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