National Lottery Grants for Heritage – £3,000 to £10,000

See all updates

National Lottery Grants for Heritage allows us to fund projects that connect people and communities to the national, regional and local heritage of the UK.

Page last updated: 7 December 2023. See all updates.

Important

We are no longer accepting applications for grants between £3,000–£10,000. Grants from £10,000–£10million will reopen in January with new Heritage 2033 guidance and forms. Explore our available funding.

Overview

Using money raised by the National Lottery, the National Lottery Heritage Fund inspires, leads and resources the UK's heritage to create positive and lasting change for people and communities, now and for the future.

National Lottery Grants for Heritage is our open programme for all types of heritage projects in the UK.

This guidance will tell you more about the programme and the types of project we can fund.

Is this the right programme for you?

- Is your organisation looking to connect people and communities to heritage in the UK?
- Will your heritage project last up to one year?
- Do you require a grant of between £3,000 and £10,000?
- Are you a not-for-profit organisation or a private owner of heritage?

If you answered yes to these questions, then National Lottery Grants for Heritage are for you.

Government sanctions

You must follow all legislation and regulations that apply to your project – this includes government sanctions and embargoes.

Things you need to know

- Requirements: your project must not start before we make a decision and it must focus on heritage in the UK.

- Deadlines: there are no deadlines so you can apply whenever you are ready.
- Assessment process: once we receive your application and all the correct supporting documents, we will assess your application and give you a decision in eight weeks.

Application questions and help notes

See the application form questions and help notes.

Further reading

- receiving a grant: tells you what you need to do if you are successful and has more detail about our requirements
- standard terms of grant: outlines the terms of our grants
- our application process: a short step-by-step guide to applying for National Lottery Grants for Heritage
- outcomes webpage: sets out the priority and other outcomes and what they look like
- good practice guidance: advice on a range of topics to help you achieve a high quality project

When you are ready, apply on our application portal

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Who can apply?

Under this programme, we accept applications from:

- not-for-profit organisations
- private owners of heritage

Here are some examples of the types of organisation we can fund:

- charities, trusts and charitable incorporated organisations
- community and voluntary groups
- community/parish councils
- community interest companies
- faith based or church organisations
- local authorities
- other public sector organisations
- private owners of heritage (for example, individuals and commercial organisations)

We will ask to see your constitution or governing document (see Supporting documents). You must have at least two people on your board or management committee who are not related by blood or marriage or living at the same address.

If you are a private owner or a private owner is involved in your project, we will assess whether public benefit outweighs any private gain so please consider this in your application.

We usually expect the owner of the heritage to fill in the application form and, if you are successful, receive the grant and report on progress. If the owner of the heritage is not making the application, then we will ask them to sign up to the terms of grant.

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What can we fund?

We fund projects that connect people and communities to the national, regional and local heritage of the UK.

Heritage can mean different things to different people. It can be anything from the past that you value and want to pass on to future generations.

As a guide, this could include:

- people's memories and experiences (often recorded as 'oral history')
- cultural traditions (for example, stories, festivals, crafts, music and dance)
- nature (for example, habitats, species and geology)
- natural and designed landscapes such as parks and gardens
- community archaeology
- historic buildings, monuments and environments
- collections of objects, books or documents in museums, libraries or archives
- histories of people and communities or places and events
- the heritage of languages and dialects
- places and objects linked to our industrial, maritime and transport history

At this grant level, we can also fund activities to support a group taking on new responsibility for heritage, or to build new skills and capacity in organisations that already have responsibility for heritage.

To find out more about this type of activity, please read the resilience guidance on our website.

We will only fund projects that:

- are clearly focused on heritage – this can be national, regional or local heritage of the UK
- address the mandatory Inclusion outcome and any other priority outcomes as applicable: See our updated Outcomes webpage
- address the mandatory requirement on environmental sustainability: See our updated Outcomes webpage for more information on this requirement
- have a clear plan with a defined start, middle and end
- have not already started
- and will last up to one year

National Lottery Grants for Heritage are able to support a broad range of types of activity. We can cover a wide range of direct project costs. As an example, your heritage project could include:

- volunteer expenses

- training costs
- event costs (including room hire, refreshments and equipment)
- small capital works
- repair and maintenance (revenue)
- new staff posts
- professional fees (for example, legal costs)
- paid training placements
- costs to improve access to your heritage
- activities to help you strengthen your organisation
- costs associated with taking on new responsibility for heritage (for example, feasibility studies)
- digital outputs
- repair and conservation
- the purchase price of collection items or property

This funding will support activity that will address our mandatory requirements of **inclusion** and **environmental sustainability**, and if relevant, other **priority outcomes.**

We cannot cover the following:

- existing staff posts or organisational costs
- statutory and/or legal responsibilities
- promoting the cause or beliefs of political or faith organisations
- recoverable VAT
- costs for any activity that has taken place before a grant is awarded

Welsh Language

If your project is to **take place in Wales**, you must consider the Welsh language in all aspects of your work and tell us how you will promote and support the Welsh language and reflect the bilingual nature of Wales. You will need to demonstrate how you will offer bilingual provision in your project's budget and plan. Please include budget for translation under the ‘Other’ costs category within the application form project costs section.

If you have any questions, queries, or require assistance, please get in touch with cymorthcymraeg@heritagefund.org.uk.

Private owners of heritage

We have separate guidance if you are a private owner or a private owner is involved in your project. You must make it clear how the public benefit of your heritage project will outweigh any private gain. If you are a private owner of heritage, we will not fund:

- works that can reasonably be considered to be the statutory duty of the owner
- the purchase of buildings or any heritage assets
- construction of new buildings

As a private owner of heritage, you must make it clear how the public benefit of your project will outweigh any private gain.

If your project includes any capital work, you will need to show us that your project:

- will significantly increase public access and public engagement with heritage
- has clear public enthusiasm and support
- needs National Lottery investment

We usually expect the owner of the heritage to fill in the application form and, if you are successful, receive the grant and report on progress. If the owner of the heritage is not making the application, then we will ask them to sign up to the terms of grant.

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Before you apply

All of the heritage projects that we support need to:

- clearly focus on heritage – this can be national, regional or local heritage of the UK
- achieve one or more of the outcomes on this page, including the mandatory one
- be environmentally friendly
- promote the role of the National Lottery in making the project possible
- carry out evaluation

The information in this section will help you consider these points in the early stages of planning your application.

Guidance

We have lots of information on our website to help you manage and develop your project.

The following are essential reading for all projects:

- Information on acknowledging your grant
- Evaluation guidance
- Environmental sustainability guidance

Outcomes

We describe the difference we want to make with our funding through a set of nine outcomes, which include our six priority outcomes. Outcomes are changes, impacts or benefits that happen as a direct result of your project.

We will prioritise heritage projects that will: **boost the local economy, provide job creation and encourage skills development, support wellbeing and create better places to live, work and visit.**

We expect all projects to demonstrate that they are building **long-term environmental sustainability** and **inclusion** into their plans.

Remember, we will only fund projects that are clearly focused on heritage – this can be national, regional or local heritage of the UK.

Priority Outcomes

- **A wider range of people will be involved in heritage** (Mandatory Outcome): Every project we fund must achieve our mandatory outcome as a minimum
- The funded organisation will be more resilient
- People will have greater wellbeing
- People will have developed skills
- The local area will be a better place to live, work or visit
- The local economy will be boosted

We would encourage you to focus on achieving one or more of our priority outcomes at this time. **For example,** if a project only delivered on the 'condition outcome' and the mandatory outcome – it would be much less likely to be supported than a project that met the mandatory outcome, plus another priority outcome.

Our other three outcomes are:

- Heritage will be in better condition
- Heritage will be identified and better explained
- People will have learned about heritage, leading to change in ideas and actions

The number of outcomes you achieve will depend on what you want to deliver and should be proportionate to the size of grant you are requesting or the specific focus of your project. There is no obligation to name more than one, and we strongly encourage you not to claim more outcomes than you really think you can deliver.

You can find more information about our outcomes on the **Outcomes webpage** and **Good Practice Guidance**.

Do not use the help icons embedded in the Outcomes Section of the online application form. You should use the application guidance and Outcomes webpage as the primary sources of up-to-date information on these.

Environmental Sustainability requirement

We expect the highest standards of environmental sustainability to be delivered by all the projects we fund.?

We want **all our projects** to do their very best to help mitigate against and adapt to the effects of our changing climate and to help nature recover.? Whether our funding is conserving a nature reserve, a museum, a public park or a building, we will expect projects to take the opportunity to create positive benefits for nature by, for example, creating roosts for bats, including green roofs, providing ponds for natural drainage and increasing tree planting.

We?want all **kinds of heritage projects**, large and small?to:

- limit any potential damage on?the environment
- make a positive impact on the environment and particularly for nature

Of course, projects?must ensure?that any environmental measures do not have a negative impact on your heritage.

Including?environmental sustainability within your projects right from the beginning will mean your project is likely be more resilient, financially sustainable?and have multiple benefits for people and community.

The measures that you implement should be appropriate for the scale of your project. We provide guidance on environmental sustainability on our website.

You should also think about how you will evaluate your environmental sustainability measures and ensure that this is part of your project's evaluation strategy. We will ask you to identify and report on the steps that you are taking. Our environmental impact guidance provides some general advice, and you can also access practical support from the Fit for the Future network.

Considering risk

All projects will face threats and opportunities that you need to identify and manage. We want you to be realistic about the risks your project and organisation may face so that you are in a good position to manage and deliver the project successfully.

When assessing your application, we will make a measured judgement on the potential risks to your project and current organisational risks – and we will look to see if you have identified these and told us how you will mitigate against them. You should also carefully consider contingency costs within your application.

The types of risk and problems you should consider are:

- financial – for example, a reduced contribution from another funding source
- organisational – for example, a shortage of people with the skills you need or staff needed to work on other projects
- economic – for example, an unexpected rise in the cost of materials
- technical – for example, discovering unexpected and wide-ranging damp
- social – for example, negative responses to consultation or a lack of interest from your target audience
- management – for example, a significant change in the project team
- legal – for example, changes in law that make the project impractical
- environmental – for example, difficulties in finding sources of timber from well managed forests

Promotion of your National Lottery grant

You must commit to acknowledging your grant and promoting the National Lottery and you should tell us about how you plan to do this in your application form and project plan.

You can find ideas on acknowledgement and promotion, and the branding we expect you to use, on our website.

Evaluation

We recommend you build in evaluation from the beginning of your project. We will ask you to write a short evaluation (maximum of 10 pages) of your project, which you will need to attach to your end of grant report.

Asking our projects to submit evaluation reports enables us to demonstrate the difference National Lottery funding has made, to know whether a project has spent the grant appropriately, and whether it has achieved the intended outcomes.

We report on these achievements through continuous programme evaluation, which relies on information from project level self-evaluations.

Your evaluation report (10 pages max) should include the following sections and detail:

Executive summary: An overall summary of the project activities and outcomes. It should be possible to read this and get a good grasp of what happened in your project and what impact the overall project has had.

What was planned to happen: This should highlight a brief background to the project, setting out why the project was started in the first place, what you planned to do and what difference the project intended to make and why.

What actually happened: (This should be the longest section of the report.) This section should detail what took place as part of the project under a coherent set of project activity headings. The difference your project made or is making should follow on from the areas of outcome and impact highlighted in the ‘What was planned to happen’ section. This section should also reflect on areas such as project management, staffing, timetable, and approach to ongoing evaluation.

Summary of lessons learnt: What are the key things that the organisation has learnt? On reflection, what would you do differently next time?

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Your contribution

At this grant level, we do not require a contribution from you but you should consider whether other funders, organisations or people might be able to support your project.

This will help show us that other people and organisations are committed to your project.

We will assess whether your project offers good value for money and we will consider your contribution. This could be a cash contribution, a non-cash contribution or a volunteer contribution.

We will ask you to tell us about your contribution in the application form.

Cash contributions

This might be from your organisation’s own reserves, a donation from a benefactor, a grant from another funder or other fundraised support (for example, crowd funding).

Non-cash contributions

This includes anything you need for your project that you do not have to pay for (for example, room hire or equipment). We can only accept non-cash contributions if they are direct project costs that could have been part of your project budget.

Volunteer contributions

This is the time that volunteers give to support the delivery of your project. This could include administrative work, clearing a site or working as a steward at an event. You should not include costs for the time of people who will take part in your activities (for example, people who attend a workshop or go on a guided tour).

We use a standard rate of £20 per hour to calculate the value of your volunteer contributions.

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Developing your idea

Our application process is competitive and we cannot fund every good quality application that we receive.

To help you develop your idea, here are some project tips:

People

Discussing your idea with people outside of your organisation will help ensure your budget and timeline take into account the needs of a wide range of people. Speaking to future partners or participants will help inform your plans. We want to know who you consulted and how they helped shape your project. Letters of support are a good way of showing us that other people want your project to happen.

Specialist support

Think about whether you need specialist support or advice to inform your ideas and budget. If you do, make sure you speak to someone who can help you design your project (for example, someone who has carried out a similar project). It is also important to think about any permissions or licences you will need (for example, listed building consent or a bat licence).

Remember to include costs for specialist support and advice to carry out your project.

Community

Find out what else is going on in your area. You might find a similar project, an organisation that you could work with or an important local issue that you could help tackle.

Resourcing

Decide who will be responsible for delivering each part of your project and whether you have the time, tools and skills to deliver it. If you do not, you can include costs for support, equipment and training in your budget and help build your organisation’s capacity.

For example, if you are thinking of working with young or vulnerable young people you will need to make sure you have the right expertise in your organisation.

Budgeting

Your budget should be realistic and based on research, quotes or previous experience. It is hard to plan for every eventuality so make sure you include an appropriate contingency for unforeseen costs.

Evaluation

It is never too early to think about how you will evaluate your project. Think about the information you will collect and any associated costs.

Evaluation will help you demonstrate the impact of your project and should inform future projects, as well as supporting your case for future funding.

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How we assess your application

Once you send us your online application, we will check everything is in place and will be in touch to let you know when you can expect a decision.

Unless we need to check anything with you, it is unlikely that you will hear from us again until we notify you of the decision.

Once we receive your application and all the correct supporting documents, we will assess your application and aim to give you a decision in eight weeks.

As an organisation that gives out public funds, we carry out some checks on the information you provide to us when you apply (for example, we may check your history with us or carry out identity or fraud checks).

You should answer all of the questions in the application form.

When we assess your application, we will consider a range of factors including:

- whether your project is relevant to heritage in the UK
- the needs and opportunities your project will address
- how strongly your project will achieve our priority outcomes
- overall value for money
- potential risks to the project's success, especially in relation to impacts of the COVID-19 pandemic on project delivery
- your approach to environmental sustainability

If your application is assessed as providing low value for money then it may be rejected earlier during the assessment period, and we will let you know this at the time.

Application process

- read the application process and plan your project
- when you are ready, send us your online application

- We will assess your application in eight weeks. The assessment of our first few applications may take slightly longer than eight weeks as we transition back into our normal grant-giving cycle. (Please note: we will not be able to assess your application until we receive all the required supporting information.)
- your application will go to a monthly decision meeting
- we will contact you to let you know the decision

Please choose when to make your application carefully. Don't rush to submit an application before you are ready, and make sure you have thought through the best way to shape your activity and how you are going to manage it. We know that we will receive a high number of applications, and we will need to prioritise where our investment can make a significant difference.

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Supporting documents

You will need to submit the relevant supporting documents, which are outlined in this section. Some of these documents will not apply to your project and the additional information will help you decide if they are relevant.

Everything we need to assess your application is in the application form and the following supporting documents. Please do not submit any extra documents, as we will not use them in assessment.

Governing document (for example, constitution)

We do not need to see your governing document if:

- you are a public organisation (for example, a local authority)
- you are a private owner of heritage

Your governing document should include the following:

- the name and aims of your organisation
- a statement that prevents your organisation from distributing income or property to its members during its lifetime
- a statement which confirms that, if your organisation is wound up or dissolves, the organisation's assets will be distributed to another charitable or not-for-profit organisation and not to the organisation's members
- the date when it was adopted and the signature of your chairperson (or other authorised person)

We are unable to accept your application if your constitution does not include the above.

Please make sure your project falls within the aims of your organisation.

The Charity Commission provides guidance on creating a governing document.

Accounts

Include your most recent audited or accountant verified accounts.

If you are a newly formed organisation and do not have a set of audited accounts, please submit your last three bank statements or a letter from your bank confirming that you have opened an account.

We do not need your accounts if you are a public organisation (for example, a local authority).

Letters of support (no more than six, if applicable)

Letters of support are a good way of showing us that you have spoken to other people and that they are interested and committed to your project.

Please send us letters of support from the people involved in your project, rather than general supportive statements. For example, if you are planning to deliver workshops at local youth clubs then a letter of support will show us that they want to take part.

If your project involves activity to take on the management of heritage, please send us a letter from the current owner giving permission for the project to go ahead.

If possible, letters should be on headed paper or signed.

Condition survey (if applicable)

If your project involves the conservation of heritage, you must provide a condition survey or another appropriate document such as a draft or outline conservation plan. This document should tell us the current condition of the heritage and the works that are needed to return the heritage to a good condition.

For example, if you plan to conserve a local war memorial, you will need to know the current condition and what repair works are needed. The survey or report should also indicate the relative priority of the suggested works (what works are most critical and need to be tackled most urgently).

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What happens after you apply?

If your application is successful

You must wait to receive Permission to Start from us before beginning your project. You will need to submit a form online and provide us with:

- your bank account details (mandatory)
- proof of ownership/leasehold requirements (if applicable)
- details of statutory permissions and/ or licences required and obtained (if applicable)
- confirmation of partnership funding (if applicable)

Your organisation will need a bank account. The name on this bank account must exactly match the name of the organisation making the application.

Once you have Permission to Start, we will pay your full grant in advance.

Reporting

When you finish your project, we will ask you to submit an end of grant report and your project evaluation. We may also ask for some evidence of expenditure (for example, invoices and receipts).

Terms of grant

We will ask you to sign up to our Standard terms of grant, which you can find on our website.

The duration of terms of grant depends on the type of project and the nature of the organisations applying. The terms of grant will last from the date of Permission to Start until:

- **activity:** the date the project finishes (known as the Project Completion Date)
- **capital:** five years after the Project Completion Date
- **digital:** five years after project completion
- **acquisition:** If your project includes buying a heritage item, land or building, the terms of the grant will last indefinitely. If you wish to dispose of what you have bought in future, you must ask for our permission and we may claim back all or part of our grant. If your project includes an acquisition, please read our requirements in our Receiving a grant guidance.

If your application is unsuccessful

The assessment process is competitive and we cannot fund all of the good quality applications that we receive. If your application is unsuccessful, we may suggest that you make another application.

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Legal and policy requirements

Ownership requirements

We expect you to own any property (land, buildings, heritage items or intellectual property) on which you spend the grant.

As an exception, if your project involves activity to take on the management of heritage or any other activity involving property you do not own, we will accept a letter from the current owner giving permission for the project to go ahead. You should send us this letter with your application.

Digital outputs

We have specific requirements, which are set out in our Standard terms of grant, for ‘digital outputs’ produced as part of any project. We are using the term ‘digital output’ to cover anything you create in your project in a digital format that is designed to give access to heritage or to help people engage with and learn about heritage.

For example, this includes photographs, text, software, web and app content, databases, 3D models, sound and video recordings.

Items created in the management of the project, for example emails between team members and records of meetings, are not included in the requirement.

If you receive a grant between £3,000 and £10,000, all digital outputs must be:

- ‘available’ (the outputs are freely available online and you can give access to the digital files on demand) for five years from the project completion date
- ‘usable’ (the outputs function as intended and are kept up-to-date)
- ‘open’ (digital outputs are licensed for use by others under the Creative Commons ‘Attribution 4.0 International (CC-BY4.0) licence with the exception of code and metadata, which should be release under a Public Domain Dedication unless we have agreed otherwise.

We expect projects:

- to ensure their digital outputs are accessible
- to use open data and tools where possible
- to contribute digital outputs to appropriate heritage collections and open knowledge projects

Guidance for digital projects can be found on our website.

Procurement and staff posts

You must follow our procurement guidelines, which can be found in our Receiving a grant guidance. As an overview, for costs for goods, works or services worth more than £10,000, you must get at least three competitive tenders/quotes.

You must also openly advertise all project staff posts, with the following exceptions:

- you have a suitably qualified member of staff on your payroll that you are moving into a project post
- you are extending the hours of a suitably qualified member of staff on your payroll so that they can work on the project. In this case we will fund the cost of the additional hours spent on the project and you will need to tell us about their role

We are committed to ensuring that the heritage sector is inclusive and sustainable. You must use the Living Wage rate (and London Living Wage where applicable) for all project staff. Please show evidence of budgeting for Living Wage rates in your staff costs and budgets.

Procedures to recruit consultants and contractors must be fair and open and keep to the relevant equality legislation.

If you are unsure about your obligations, we advise you to take professional or legal advice. If you have already procured goods, works or services for the project that are worth more than £10,000 (excluding VAT), you will need to tell us how you did it. We cannot pay your grant if you have not followed the correct procedure.

You must use the Living Wage rates for all project staff.

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Additional information

The evaluation budgeting and reporting section below is relevant for all projects.

You should also read the following sections if they are relevant for your project:

- Buying land and buildings
- Buying heritage items and collections
- Projects involving land, habitats and species
- Third party ownership requirements including for community grants

Evaluation budgeting and reporting

We recommend allowing a budget for evaluation of between 2% and 7% of your total projects costs. Your budgets for evaluation should not be less than the 2%. For example, if a project applies for funding of £190,000 we would expect a minimum of £3,800 (2%) to be allocated to evaluation. If your evaluation budget is lower, you will need to tell us why in the description for this project cost.

You will be asked to write an evaluation of your project and attach it to your final completion report. We aim to fund projects that create positive and lasting change for people and communities.

Asking our projects to submit evaluation reports enables us to demonstrate that difference and to know whether a project has spent the grant appropriately and desired outcomes have been achieved. We report on these achievements through continuous programme evaluation, which relies on information from project level self-evaluations.

We will also send you an evaluation questionnaire within one year of the completion of your project. It will ask for information on the numbers of activities undertaken, the number of visitors you have received (where appropriate), the amount of training and volunteer involvement in your project, and any extra staff you have taken on. For all of these ‘outputs’ of your project, we will be interested in the types of people that have benefited as well as the overall numbers.

The quantitative information that we expect you to collect for your evaluation questionnaire is outlined below. For visitors, volunteers, trainees and staff, we also ask for demographic details by gender, age, ethnicity, sexual orientation, disability and social class.

On their own, these numbers will not tell the whole story of what your project is about, and your evaluation report will need to tell us about the quality of your project as well.

Activities

We will want you to tell us how many activities were carried out using your grant. The activities we list are:

- **Open days:** days when you open a heritage site, collection or feature to the public, which cannot normally be visited. It can also include days when you do not charge for admission at attractions that normally charge an entrance fee.
- **Festivals:** programmes of events or activities for the public, lasting one day or more, with a clearly defined theme or focus.

- **Temporary exhibitions and displays:** exhibitions or displays that are not a permanent feature of your site and last for less than 12 months.
- **Guided tours or walks:** these may be guided by either your staff or people outside your organisation, but must be based on your heritage site or feature.
- **Visits from schools and colleges:** these can include visits by primary, secondary and higher levels of education.
- **Outreach sessions in schools and colleges:** visits made by your staff or the volunteers working with you on the project.
- **Other on-site activities:** activities that take place at your site that you feel are not included under the other headings.
- **Other outreach or off-site activities:** activities that have taken place away from your site that you feel you have not been able to tell us about.

Visits

Data about the number of people who visited your attraction the year before your project started and the year after it completed. If the attraction or facility we fund is part of a bigger attraction (for example, if we funded a gallery within a larger museum), we only want you to give us visit numbers for the part of the attraction or facility that we give money towards.

Volunteers

The number of volunteers involved with the funded project and the number of volunteer hours they contributed.

Training

The number of people trained through the project, under a set of skills headings covering conservation, audience engagement and management.

Training includes any structured programme of on-the-job training, skillsharing, work-based learning and work experience. We ask you to distinguish between training for your staff and training for volunteers.

New staff

The number of new staff posts created to carry out your project, and the number of these still being maintained after the end of the project.

For more information read our evaluation guidance.

Capital works

Capital works are defined as works that create or improve an asset.

By capital work we mean digitisation of collections, a conservation programme for objects and collections, repair and conservation works or new build, refurbishment and redisplay of galleries and/or buildings.

For example, conservation of a heathland, repairs to a memorial and digitisation of a photographic archive would all be considered as capital works.

Reusing and adapting built heritage has an important role to play in reducing carbon emissions and tackling climate change, and whilst new build might be necessary and appropriate, in some cases we will prioritise re-use and sensitive adaptation of existing buildings.

For landscape and nature capital projects we will prioritise those that focus on one or all of the following themes; support nature's recovery, deliver nature-based solutions to climate change and/or help people reconnect with nature.

Buying land and buildings

We can fund projects that involve the purchase of land and/or buildings that are important to our heritage, and are at or below market value. The principal reasons for purchase must be a benefit for long-term management of heritage and for public access.

If you already manage the land and/or buildings that you want to buy, you will need to show us what extra benefits the purchase will bring.

You will need to show that all options for entering into an appropriate management agreement with the freehold owner have been explored before seeking a grant for purchase.

We can help you to buy land and/or buildings if you demonstrate in your application form that:

- any risks to their preservation will be reduced by your purchase
- the price accurately reflects the condition and value
- the purchase will contribute to more people engaging with the heritage
- you have adequate plans for management and maintenance over a period of at least 10 years after project completion
- you can demonstrate their significance to the heritage in a local, regional or national sense

We will not support purchases that we think are above market value. If we award you a grant, we may require a charge on the land and/or buildings. We can fund all associated purchase costs such as agent's fees, saleroom fees and taxes. Please ensure these are reflected in your cost table.

If your project includes buying a heritage item, land or building, the terms of the grant will last indefinitely. If you wish to dispose of what you have bought in future, you can ask for our permission. We may claim back our grant.

The information we need about the purchase:

- a location plan to scale, clearly identifying the extent of the land or building to be purchased and any relevant access to the land and building
- One independent valuation. This should include a detailed explanation of how the assessment of the market value was reached. We welcome valuations by the District Valuer. We may also arrange for our own valuation. We will normally be prepared to support a purchase at a figure up to 10% above the top of any range in an accepted valuation.

- evidence that the current owners are the owners (have legal title) and have the right to both sell the land and/or building and transfer the title to the new owner; and evidence of any legal covenants, or rights (such as fishing, shooting, mineral, drainage), or long- or short-term tenancies, or rights of way or access, or any other interests which are attached to the land or building

Buying heritage items and collections

We can fund projects that involve the purchase of heritage items or collections that are important to our heritage and contribute to achieving our outcomes.

We will only help to buy items or collections if you demonstrate in your application form that:

- risks to their long-term future will be reduced if you buy them
- the price accurately reflects their condition and value
- you have a collecting policy and the purchase is in line with your policy
- the items will be accessible to the public once purchased
- you can show that you have adequate plans for their long-term care and maintenance

We will fund buying works of art, archives, objects and other collections that are important to the heritage and which were created more than 10 years ago. We will also fund buying more recent items of heritage importance, but only if they are part of a larger collection, which is more than 10 years old.

If your project includes buying a heritage item, land or building, the terms of the grant will last indefinitely. We may require a charge on the item(s). If you wish to dispose of what you have bought in future, you can ask for our permission, and we may claim back our grant. If you already have the item(s) on loan to your organisation, you will need to show us what extra benefits buying them will bring.

There is unlikely to be sufficient public benefit in the acquisition of a heritage item by one publicly funded collection from another for us to consider funding the purchase.

We will not support purchases that we think are above market value.

We will not give priority to a purchase simply because of an export stop. An export stop gives organisations a chance to raise money needed to buy an item or collection that is intended for export. The export stop defers the export licence for a specified period in order that an offer may be made from within the UK.

If you intend to apply to us you should contact your local office as soon as possible, and within the first deferral period.

If you need an urgent decision from us, you must contact your local office to discuss this before you apply. We can only consider offering fast-track decisions for buying heritage items or collections if the deadline means we cannot assess your application within our usual timetable.

Our staff will discuss with you the implications of our fast-track procedure for your application. If you have a short amount of time to buy the item(s), we ask you to provide us with details of how this object will be integrated into your existing learning activities and public programmes.

We do not require you to have a separate activity plan but we will expect activities and programmes to be appropriate for the object you are acquiring.

Costs

The eligible costs associated with a purchase include:

- the purchase price itself
- fees incurred by your organisation as the buyer including valuations; agent's fees; and the buyer's premium for purchases at auction
- unreclaimable VAT

Ineligible costs include:

- seller's fees (for example, legal and agents' fees)

You should also include the costs of all the other activities you will do in your project once you have bought the item(s). The costs of your activities must be in proportion to the cost of the item(s).

The information we need about the purchase

You will need to provide:

- information about the history and significance of the item(s)
- a statement about why you are the right organisation to own the item(s). This should be supported by what you say in your policies, such as your acquisition or collections-management policy
- evidence that you will become the full owner of the item(s) or a good case for well-planned joint ownership
- documentary proof of the provenance (origin) of the item(s). Examples of proof include sale documents, legal documents, export documents, written statement by the current owner, history of the item(s)
- evidence that the current owners are the owners (have legal title) and have the right to both sell the item(s) and transfer the title to the new owner
- an independent valuation on an open market basis for the item(s) you wish to buy; this should include the valuer's reasoning to support the valuation, not just a statement of the value; you do not need to commission a valuation for an item (or items) which is the subject of an export stop or part of the Treasure Valuation Process
- Evidence that you have followed current guidance on portable antiquities, illegal trade, and items and collections that could be sensitive. You should provide a statement outlining your research into the relevant laws and guidelines on ethical acquisitions.
- a description of how you will manage the item(s) and keep it secure, both at the time you buy it and in the future
- a conservator's report saying whether the item(s) have conservation needs and, if so, how you will meet those needs. The report should include evidence that your organisation has the right environmental conditions to house the purchase

Projects involving land, habitats and species

Biological-recording projects

Any species observations must comply with the standards for data quality and accessibility as set out by the National Biodiversity Network (NBN) on the NBN Atlas website. These observations must be made available to the public on an open licence at capture resolution, subject to sensitive species restrictions.

There are several ways of achieving this. NBN Atlas Data Partners may prefer to supply datasets directly to the NBN Atlas. Alternative options include through online recording tool iRecord or they can be shared with your local or regional environmental record centre for onward transmission to the NBN Atlas website. Please ensure if submission to the NBN Atlas is via a third party they are aware of the requirements to submit this data at capture resolution on an open licence.

If you are unsure how best to proceed, please contact the NBN directly to discuss the most appropriate data supply route. You must also meet our digital requirements.

The information we need about agricultural state aid

You will need to provide state aid clearance from Defra if agricultural state aid rules are likely to apply.

Working on private land

Many priority habitats and species occur on land that is owned by private individuals or for-profit organisations.

We do accept applications for landscape and nature projects that are on both public and privately owned land, provided that public benefit outweighs any private gain for the individual land owner(s) where they are private individuals or for-profit organisations.

In order to include private land your overall project must meet all four criteria below:

- have a core of good-quality priority habitat or support a significant population of priority species from which to extend out from
- enhance and/or expand the extent and quality of habitat that will help to meet UKBAP habitat and species targets
- contribute to long-term sustainable management of the area
- demonstrate a strategic approach to the conservation of a priority habitat or species

Even when working on private land we will expect some degree of public access to be provided.

We also accept the principle of zoned levels of physical access within your project area and that physical access may not always be appropriate or desirable for habitat conservation reasons. There should already be public access to the land that you own, and you may also have some infrastructure, for example paths or hides, that can help to accommodate increased public access.

Third party ownership requirements

For landscape and nature projects

Where the land (which may include different plots of land over a wide area) that is the subject of grant funding, is owned by a third party or multiple third parties (including private owners), legal agreements should be put in place between each land owner and the grantee.

There is no prescribed form of agreement but we have specific requirements which should be included in any third party land owner agreements. At a minimum, the land owner agreements should include the following:

Details of the parties:

- confirmation as to how the land is held (freehold or leasehold)
- a description of the property (including plans)
- covenants on the part of the land owner to maintain the land and provide public access in accordance with the terms of the grant (as applicable)
- a provision that any onward disposal should be subject to the third party agreement
- that the agreement will last from the start of the work on the third party land until 10 years following Project Completion

You will need to provide us with copies of the landowner agreements to ensure compliance with these requirements. The landowner agreements will need to be completed and in place before any grant monies are released for work on each plot of land owned by a third party.

For capital works to built heritage (for example, historic buildings, ornamental gardens)

If your project involves substantial work to a heritage building that is owned by a third party we will usually expect the owner to become a joint grantee or to grant you a lease which meets our requirements. In some situations, rather than make the owner a joint grantee, we may ask them to sign a side letter agreeing to comply with the terms of grant insofar as they relate to matters within their control.

Legal costs

You may include the costs of adapting and setting up any third-party agreements, including the cost of taking legal advice, as part of the costs in your application.

Expand All accordions

What next?

Use this handy checklist to make sure you are ready to apply:

- I have read this guidance document
- I have read the terms and conditions of this grant programme
- I have drawn up a project budget and checked my costings
- I have planned how to evaluate my project
- I have filled in all sections of the online application form
- I have prepared all the mandatory supporting documents

When you are ready, apply on our application portal

Contact us

You can find more information about contacting us on our website.

If you want to find out about our complaints process, please visit our Customer service page.

Page updates

We will regularly review this guidance and respond to user feedback. We reserve the right to make changes as required. We will communicate any changes as quickly as possible via this webpage.

Changes:

- **1 March 2023:**
  - It was previously stated that the priority outcomes would remain in effect until the end of the 2022-2023 financial year. This end date was removed.
  - Information about COVID-19 risks and regulations was brought up-to-date. For example, information about social distancing was removed from the overview.
- **23 March 2023:** A link to the application form questions and help notes was included.
- **7 December 2023:** We are no longer accepting applications for grants between £3,000–£10,000. Grants from £10,000–£10million will reopen in January with new Heritage 2033 guidance and forms.