National Lottery Grants for Heritage – £250,000 to £10million

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: 16 November 2023. See all updates.

Important

We are no longer accepting development round applications for grants over £250,000 (delivery round applications and Expressions of Interest are not affected). This programme 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 is for applications for grants from £250,000 to £10million. At this grant level, you must first send us an Expression of Interest. If you are invited to apply, your application will then go through a development and a delivery phase. 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 be delivered over five years?
- Do you require a grant of between £250,000 and £10million?
- Are you a not-for-profit organisation or a partnership led by a not-for-profit organisation?

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.

Heritage enterprise

Some heritage projects seek to achieve economic growth by investing in heritage. We call these ‘heritage enterprise’ projects. Heritage enterprise applications also must demonstrate how they meet our priority outcomes. The maximum you can apply for under heritage enterprise is £5m.

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.
- Before you apply: you must submit an Expression of Interest form to tell us about your idea and we will let you know if you are invited to apply.
- Deadline for applications: quarterly.
- Assessment process: we will assess your application in 12 weeks and, following assessment, it will be assigned to a quarterly decision meeting.
- Your contribution (partnership funding): you must contribute at least 5% of your project costs for grants up to £1million and at least 10% for grants of £1million or more.

Application form questions and help notes

View the application form questions and read help notes:

- Development stage questions and help notes
- Delivery stage questions and help notes

Further reading

You will also find the following resources useful when making your application:

- receiving a grant guidance: 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
- our outcomes: 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, submit your Expression of Interest on our application portal

Expand All accordions

Who can apply?

Under this programme, we accept applications from:

- not-for-profit organisations
- partnerships led by not-for-profit organisations

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

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.

Partnerships

We encourage you to work with other people to develop and carry out your project. If you plan to work with another organisation to carry out a significant proportion of your project we advise you to formalise your relationship with a partnership agreement.

If your project partners will provide goods or services paid for through our grant, we will need to see your partnership agreement as part of your application.

If you are making a joint application, you will need to decide which organisation will be the lead applicant. The lead applicant will fill in the application form and, if you are successful, receive the grant and report on progress. We usually expect the owner of the heritage to be the lead applicant. If the owner of the heritage is not making the application then we will ask them to sign up to the terms of grant.

We do not recommend a particular type or format of partnership agreement. It is up to the parties involved in partnerships to work out what is best for them.

Expand All accordions

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

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
- include a development phase that will last up to two years
- include delivery phase that will last up to five years

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:

- the purchase price of collection items or property
- repair and conservation
- event costs (including room hire, refreshments and equipment)
- capital works
- repair and maintenance (revenue)
- new staff post s
- paid training placements
- training costs
- professional fees (for example, legal costs)
- volunteer expenses
- 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)
- Full Cost Recovery
- digital outputs

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

Refer to the Application form and help notes for more details.

We cannot cover the following:

- existing staff posts or organisational costs (unless calculated through Full Cost Recovery). If you are moving an existing member of staff into a post created by this project, or extending the hours of an existing member of staff, this can be covered in your project costs. The post will need a clear job description and specified hours
- 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 .

Full cost recovery

If you are an organisation in the voluntary sector, we can cover a proportion of your organisation's overheads. **Funding to cover a proportion of your organisations' running costs, alongside direct project costs, can be important for your sustainability. If your organisation is eligible we would encourage you to consider including full cost recovery in your budgets.** Costs should be proportionate to the time or resources used for your project. We can also cover a proportion of the cost of an existing member of staff, as long as they are not working exclusively on the funded project in a new post. We expect this contribution to be calculated using Full Cost Recovery.

By voluntary sector we mean organisations that are independent of government and whose governance, finance and resources have a voluntary focus. For example, a voluntary sector organisation might have a board of trustees, be funded by grants and donations, and rely upon volunteers to carry out their aims.

We cannot accept applications that include Full Cost Recovery from public sector organisations (for example, government-funded museums, local authorities or universities).

Recognised guidance on calculating the Full Cost Recovery amount that applies to your project is available from organisations such as The National Lottery Community Fund. You will need to show us how you have calculated your costs, based on recent published accounts. You will then need to tell us on what basis you have allocated a share of the costs to the project you are asking us to fund, and we will assess whether this is fair and reasonable.

Capital works inflation costs

Funding applications should include appropriate costs to adequately cover predicted capital works inflation.

Inflation for construction projects is likely to remain high for the foreseeable future. Each project should make appropriate provision for inflation based on the project timescale, plus other factors such materials used, labour demands and location.

Applicants can access analysis and projections for inflation costs from sources such as the Building Cost Information Service and consultancies including Gardiner & Theobold Market Intelligence, Turner & Townsend and Rider Levett Bucknall.

Community grant schemes

As part of your project, you can ask us to contribute towards a ring-fenced pot of money that you can use to fund other groups/organisations to deliver small discrete projects. We call these grants ‘community grants’. These community grants will contribute to the overall aims of your project. Any grants like this must demonstrate good value for money, and public benefit should outweigh any private gain. You will manage the funding pot, develop an application process with a decision panel and monitor progress. The community grant scheme must also be publicised by you so it is widely known and open to all.

You can award grants to not-for-profit community groups or private owners of heritage (for example, owners of archives, land or buildings). The grants you award can be for both capital works and activities.

We recommend that the total community grant scheme pot does not exceed £200,000 in total.

You should limit any individual grant to:

- activity: £10,000
- capital: £25,000

Some projects may need to exceed the limit in order to conserve heritage that is key to the character of an area, for example, if you are restoring a building as part of a townscape scheme. If your project needs a larger community grants budget or bigger awards to individual third parties, you will need to tell us about this in your Expression of Interest form and justify this in your application.

If your project includes community grants to either organisations or individuals for capital works to the heritage they own, these grants must be governed by a ten-year future management and maintenance agreement.

Acquisitions of land, buildings or heritage items are not allowable under community grant schemes.

Any grants to third parties must demonstrate good value for money and public benefit should outweigh any private gain.

You can find more information about community grants and building maintenance on our website.

Expand All accordions

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
- address environmental sustainability
- promote the role of the National Lottery in making the project possible
- carry out evaluation

The information in this section will help you to consider these points in the early stage 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:

- Activity plan guidance
- Information on acknowledging your grant
- Evaluation guidance
- Understanding your heritage
- Environmental sustainability guidance

If your project involves capital works, you should also read the following documents available on our website:

- Conservation plan guidance
- Building maintenance guidance

We expect all projects to follow best practice in project management. We have some guidance on this and templates for key documents (for example, project cashflow) is available on our website.

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 inflation and 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. You can find out more about our minimum requirements for acknowledgement on our website.

As well as acknowledging your grant, we expect you to provide special access and/or offers for National Lottery players, on at least an annual basis.

We expect you to develop innovative and creative offers or promotions designed to thank National Lottery players for their support and to raise awareness of the funding you've received. Examples of these, and other imaginative things that projects have done can be found on our website.

If your grant is for more than £1 million towards a new exhibition space, visitor centre, community garden or other public facility, we would also like to discuss how The National Lottery might best be incorporated into the name of the space or site.

Evaluation

We recommend you build in evaluation from the beginning of your project. Our evidence shows that the more carefully projects budget for their evaluation, the higher the quality of the final report. We have recommended minimum spends on evaluation and you can find further guidance on this on our website.

At the end of your project we will expect some evaluation feedback, in two parts:

- your own evaluation report, sent in before we pay the last 10% of your grant
- An evaluation questionnaire, within one year of completion. You can see the information we will want you to report in our evaluation guidance on our website.

Expand All accordions

Your contribution

Your contribution will depend on the amount of grant you are asking for.

Grant request: £250,000 to £1million

- contribution: at least 5% of the costs of your development phase and 5% of the costs of your delivery phase

Grant request: £1million to £10million

- contribution: at least 10% of the costs of your development phase and 10% of the costs of your delivery phase

We describe this contribution as ‘partnership funding’ and it can be made up of cash, non-cash contributions, volunteer time or a combination of all of these. We will assess whether your project offers good value for money and take your contribution into account.

If your project involves capital work, the value of increased future costs of management and maintenance for up to five years after practical completion can be included as partnership funding. See our online guidance on building maintenance for more information.

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 time

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.

National Lottery funding

You can use funding from another National Lottery distributor to contribute towards your project as partnership funding. However, this can’t count towards your minimum contribution of 5% or 10%, which must be made up of contributions from your own or other sources, not including the National Lottery.

Expand All accordions

The application process

Expression of Interest

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

We recognise the work that goes into preparing an application and so to keep competition at manageable levels, and give you the best chance possible, we ask all applicants for a grant above £250,000 to complete a short Expression of Interest (EOI) form.

We will use the information you provide to decide whether or not to invite you to submit a development phase application. An invitation to apply does not guarantee a grant from us in the future but does indicate that we see potential in your initial proposals.

If you are successful, your EOI approval will remain valid for 12 months and a Development Phase application will need to be submitted within this time.

We aim to respond to your EOI within 20 working days of receipt. If we decide to invite you to apply, we will contact you to discuss next steps. If we are not inviting you to apply we will explain our reason.

Development and delivery phases

All applications should include a development phase to help you work on your project proposal. During this phase, you will gain a better understanding of the costs, resources, timeline and the needs of your audiences.

You will decide how long you need to develop your delivery phase proposals. You may take up to two years, depending on the complexity of your project.

Once you have submitted your application form it is not possible for us to return this to you for further work, or to release a new copy. It is therefore important to make sure that you are happy with your answers before you submit your application.

Your application will be in competition with other projects in both the development and delivery phases. A development phase award does not guarantee that you will receive delivery phase award.

Urgent decisions

In exceptional circumstances, we may consider a fast-track application process, if there is a compelling need for a faster decision (for example, if you have an opportunity to buy a heritage item at an auction but need to move quickly). If you think this applies to your project, you should submit an Expression of Interest form and we will discuss this with you.

Expand All accordions

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.

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).

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.

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
- how project outcomes will be sustained
- 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

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.

Our decision makers use their judgement to choose which applications to support, taking account of quality, achievement of outcomes, risk and value for money. They may also consider issues such as achieving a geographical spread of our funding and whether your application is a priority for funding (as set out in our Strategic Funding Framework 2019–2024).

Our decision may be made a few weeks after our 12-week assessment period, depending on the next meeting date. Make sure you allow for this when planning your project timeline.

Expand All accordions

Information we need

The information below shows the different levels of information you will need to have considered for your development phase and delivery phase application. See also the list of supporting documents.

Development phase application

Activities

Outline proposals:

- who is your project likely to involve?
- the nature and range of activities that will engage people with heritage

Capital work

Outline proposals:

- draft or outline conservation plan
- details of ownership – whether freehold or leasehold
- an initial breakdown of the capital work you plan to carry out
- plans for architectural elements up to and including RIBA work stage 1*
- plans for non-architectural elements, such as interpretation or digital outputs, at the equivalent of RIBA work stage 1
- independent valuation if the project is for the acquisition of collections or single objects

Project outcomes

Outline information about the outcomes your project might achieve

Project management

- detailed information about the work you will do during your development phase
- detailed information about how you will manage your development phase, including briefs for work to be undertaken by consultants, new job descriptions
- detailed timetable for your development phase
- outline information about how you will manage your delivery phase
- outline timetable for delivery phase

After the project ends

- your organisation’s current business plan
- outline information about how you will sustain the outcomes of your project after funding has ended, including funding additional running costs

Project costs

- detailed costs for your development phase
- outline costs for your delivery phase
- possible sources of partnership funding for your delivery phase and/or a fundraising strategy for your development phase

Delivery phase application

Activities

Detailed proposals:

- A detailed action plan, showing all the activities in your project. This will be included in your Activity Plan or Area Action Plan.

Capital work

Detailed proposals:

- a conservation plan, if required
- ownership should be confirmed and meet our requirements
- detailed plans and proposals for capital work you plan to deliver
- plans for architectural elements up to and including RIBA work stage 3
- plans for non-architectural elements, such as interpretation or digital outputs at the equivalent of RIBA work stage 3

Project outcomes

Detailed information about the outcomes your project will achieve

Project management

- detailed information about how you will manage your delivery phase, including briefs for work to be carried out by consultants and new job descriptions
- detailed timetable for your delivery phase

After the project has finished

- your organisation's business plan, updated to reflect your plans for project delivery and sustaining the project's benefits after funding has ended, including funding additional running costs
- detailed information about how you will evaluate your project
- information about your management and maintenance policies – either as a management and maintenance plan or included in your conservation plan

Project costs

- detailed costs for your delivery phase
- an indication that you will have secured partnership funding in place before you start your delivery phase

Your development phase

During your development phase you will build on your project ideas. The work you do in your development phase will depend on your project but it is likely to include consultation with people outside of your organisation, activities to strengthen your organisation (such as a governance review, review of your organisation's business plan), detailed

design and planning, and survey work.

Development phase review

We will review your project during your development phase to see how you are progressing with your delivery phase application and additional plans. For projects involving capital work, we will look at your plans when they are in line with RIBA work stage 2.

The main purpose of the review is to confirm:

- that the project is being developed in line with the approved purposes and outcomes
- costs and partnership funding updates indicate a viable project
- risks are manageable
- overall the project still offers good or improved value for money

If there have been significant changes, the review provides the opportunity for us to highlight risks, areas of concern and where further work is needed.

If there are serious concerns, your project may fail the development phase review and we will recommend that you do not apply for a delivery phase.

To help you plan your development phase, here are some key tasks you will need to carry out:

1. For projects involving capital works to land or buildings, you should continue to work through the conservation planning process, refining your understanding of your heritage and the opportunities to share your heritage with others so that your project will fully capitalise upon its potential while addressing any risks and threats that you have identified. You will be asked to share your draft conservation plan with us during the development phase.
2. For any capital work to buildings, undertake any **surveys, consultations or investigations** necessary to develop your detailed plans and proposals, for example, an access audit or an assessment of the current environmental performance of your building. Consider whether there are any legal issues relating to ownership of land or property that you need to resolve to ensure you meet our requirements for the delivery phase.
3. Consult new and existing audiences in order to develop a detailed programme of activities to demonstrate how you will achieve the outcome a ‘wider range of people will be engaged with heritage’. This will form your **activity plan or area action plan**.
4. Develop **detailed timetable, costs and cash flow** for your delivery phase.
5. Consider in detail how your project will **impact on your organisation** and how you will manage this change. You may need to carry out a governance review and update your organisation’s business plan and fundraising strategy.
6. Consider how you will **sustain project outcomes** after funding has ended, and how you will meet any additional running costs. If you are producing a management and maintenance plan, this information will feed into this and your updated organisational business plan.
7. Consider how you will **evaluate your project**, and collect baseline data so that you can measure the difference your project makes.
8. Consider how you will **buy goods, works and services** during your delivery phase. Our receiving a grant guidance contains information on procurement.
9. Consider how you will acknowledge our grant and promote the role of the National Lottery players in supporting your project.

10. Undertake the work necessary to produce all relevant **supporting documents** for your delivery phase application.

Expand All accordions

Supporting documents

You will need to submit the relevant supporting documents from this section with your online application and we must receive them by the published application deadline.

This list includes the supporting documents for the development phase application and the delivery phase application.

Some of the documents will not apply to your project and the additional information in this table 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.

Development phase supporting documents

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)

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.

Last three years' accounts and current year's management accounts

Audited accounts are independently examined and should be signed off annually. We would also like to see your management 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).

Detailed cost breakdown

Spreadsheet detailing the cost breakdown provided in Section six: Project costs of the online application form.

This document is mandatory for all applicants.

Partnership agreements (if applicable)

If you are plan to work with another organisation to carry out your project, it is good practice to have a partnership agreement. This document should outline both partner's roles and responsibilities and be signed by all parties.

You only need to provide your partnership agreement if your partner organisation will receive grant payments to deliver part of your project.

We do not recommend a particular type or format of partnership agreement. It is up to the parties involved in partnerships to work out what is best for them.

Job descriptions (if applicable)

If you plan to recruit a new member of staff to help deliver the development phase of your project, including an apprentice, please submit a job description for that post.

Briefs for internally or externally commissioned work (if applicable)

Briefs describe any work you plan to commission in your development phase. If you are commissioning work (for example, from an artist or an architect) then you should submit a brief.

The brief should describe the works, how long they will take, how much they will cost and the skills required. You can find a template brief on our website.

For fees over £10,000 you should obtain three competitive tenders or quotes, for fees over £50,000 we will expect you to provide proof of the competitive tendering process.

Images (no more than six)

Please provide images that help illustrate your project. These images will be used to present to decision makers so should be of a high quality and relevant to your project.

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 submit 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 a local care home then a letter of support will show us that they want to take part.

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

Calculation of full cost recovery for the development phase (if applicable)

If you are including full cost recovery in your project budget, you must include a document that outlines your calculation.

Find out more about calculating full cost recovery on The National Lottery Community Fund website.

Business plan

We would like to see a copy of your organisation's current business plan. If you do not have a business plan please submit the planning document you work with to manage your heritage. If you are an organisation that manages multiple sites or are, for example, a Local Authority, please submit the planning documents most relevant to the heritage in your application.

Your business plan is mandatory for all applicants.

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 that is, what works are most critical and need to be tackled most urgently.

Ownership documents (if applicable)

If you are planning any capital works, or intending to purchase land/buildings/ collections, please provide copies of Land Registry ownership documents and in the case of leasehold property, any lease, heads of terms or draft lease.

If you do not meet our ownership requirements, please tell us how you plan to address this in your development phase.

You should attach the relevant supporting documents to your application form. We can accept most standard file formats.

When submitting supporting documents, please use the document names above so we can easily identify each document. Not using this format may delay your application.

We will not begin assessing your application until you submit all of the relevant supporting documentation.

Delivery phase supporting documents

- activity plan or area action plan
- project timetable
- cash flow for the project
- income and spending forecasts for five years following completion
- project management structure
- spreadsheet detailing the cost breakdown
- calculation of Full Cost Recovery (if applicable)
- briefs for internally and externally commissioned work
- job descriptions for the delivery phase
- business plan (updated)
- images
- flow-chart summarising decision making for third party grants (if applicable)
- management and maintenance plan (if applicable)
- design specification (if applicable)
- interpretation plan (if applicable)
- fully developed conservation plan (if applicable)

For applications between £5m and £10m

Applications received in 2023 will be assessed on the criteria of our current Strategic Funding Framework 2019-2024. However, due to the timelines involved in developing projects at this scale, we want you to consider our new Heritage 2033 investment principles:

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

You will need to submit a supporting document of 500 words or less outlining how your project will respond to all four principles.

Expand All accordions

What happens after you apply?

If your application is successful

We will contact you about arranging a start-up meeting. At this meeting you may be introduced to a consultant who will support you in developing or delivering specific aspects of your project, or help review risks. We will review your project at suitable stages.

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 (for all capital projects, if any changes have taken place since application)
- details of statutory permissions and/ or licences required and obtained (if applicable)
- confirmation of partnership funding (if applicable)
- project cashflow forecast
- project management structure and methods for choosing consultants, contractors and suppliers
- project timetable or work programme

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

For development grants of less than £100,000 we pay your grant in three instalments:

1. We will give you 50% of the grant upfront.
2. Once you have spent the first half of your total eligible project costs, we will give you the next 40%.
3. We will pay the final 10% of your grant when you have finished your development phase.

For development and delivery grants of £100,000 or more, we will pay instalments of our grant after the work that you are asking us to pay for is complete. We will also retain the last 10% of your grant until we are satisfied that the project is complete and you have submitted your completion report and evaluation.

Payment percentage

You or another organisation will contribute towards your project and so we will be granting you a percentage of the project costs. We describe this percentage as the ‘payment percentage.’

Here’s an example, where the payment percentage is 90%:

- total project costs: £50,000
- your cash contribution: £5,000
- your grant: £45,000
- payment percentage: 90%

We will pay you the ‘payment percentage’ of the total amount you spend on the project.

If you spend less on the project than you were expecting, then we will not pay you the full grant.

If you spend more on the project than you were expecting, then we will be unable to give you more than the grant we awarded you.

Here’s an example, where the total amount spent on the project was less than expected:

- total project costs in the application form: £50,000
- payment percentage: 90%
- total amount spent on the project: £45,000
- total amount we pay: £40,500 (90% of £45,000)

Reporting

We will expect you to report on the progress of your project at least each time you request a payment in arrears. You will need to provide a progress report at least every quarter, including when you complete your project, alongside your evaluation report.

We will expect evidence of delivery and expenditure, such as photos, reports, invoices and receipts. More detailed information on our monitoring process can be found in the Receiving a grant document on our website.

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 the terms of grant depends on the type of project.

They will last from the date of Permission to Start until:

- **activity:** the date the project finishes (known as the Project Completion Date)
- **capital:** 20 years after the Project Completion Date
- **digital:** 20 years after the Project Completion Date
- **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 the future, you must ask for our permission and we may claim back all or part of our grant.

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 but you must talk to us about this with us before reapplying.

Expand All accordions

Legal and policy requirements

Ownership

We expect you to own any property (land, buildings, heritage items or intellectual property) on which you spend the grant. If you do not meet our ownership requirements, you will need to improve your rights in your development phase (for example, by changing or extending a lease) or include the owner as a joint applicant in your application, if applicable.

Land and buildings

For projects that include works on land and buildings, you must own the freehold or have a lease that meets our requirements:

- for projects involving work to a building or land, if your organisation does not own the freehold, you will need a lease with at least 20 years left to run after the expected day of the Project Completion Date
- if your project involves buying land or buildings, you must buy them freehold or with a lease with at least 99 years left to run
- we do not accept leases with break clauses (these give one or more parties to the lease the right to end the lease in certain circumstances)
- we do not accept leases with forfeiture on insolvency clauses (these give the landlord the right to end the lease if the tenant becomes insolvent)
- you must be able to sell on, sublet and mortgage your lease but if we award you a grant, you must first have our permission to do any of these

Taking security for the grant

Legal charge: It is our policy to take a charge over the grant-funded property when you are a non-public body, your project involves capital works and your grant is over £250,000.

Restriction on title: If you are a public body such as a local authority or a university we will require a restriction on your Land Registry title to ensure you seek our consent before entering into any future transactions relating to the grant funded property.

If any of the above applies to your project, you will need to send us your solicitor's contact details as soon as possible following your delivery phase award.

Heritage items

For projects involving buying a heritage item or carrying out conservation work to a heritage item (for example, a steam train or a painting), you must buy or own the item outright. We cannot fund private individuals or for-profit organisations to buy buildings, land or heritage items.

If you are borrowing item/s as part of the project (for example, for an exhibition) and are asked to contribute towards the costs of conservation then we may accept this cost if it forms a small part of your project.

The owners of the item/s may need to be tied into your partnership agreement, or tied into the Standard terms of grant if a grant is awarded. Please include this in your Expression of Interest form, if you think this will apply to your project.

If you are planning a capital building project with the purpose of storing or displaying a collection that you do not own we will require the owner of the collection to be tied into the Standard terms of grant (and any additional conditions set out in the grant notification letter) if a grant is awarded. Please include this in your Expression of Interest form, if you think this will apply to your project.

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 and/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 above £250,000, all digital outputs must be:

- ‘available’ (the outputs are freely available online and you can give access to the digital files on demand) for twenty years from the project completion date
- 'usable’ (the outputs function as intended and is 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

If you are creating digital outputs:

- you must provide a management and maintenance plan with your delivery phase application
- you may include the value of the increased future costs of management and maintenance for ten years as partnership funding We expect websites to meet at least W3C Double A accessibility standard

We expect:

- websites to meet at least W3C Double A accessibility standard
- you to use open data and tools where possible
- you 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. As an overview, projects with any goods, works or services worth more than £9,999 (excluding VAT), must get at least three competitive?tenders/quotes. For all goods, works and services worth more than £50,000 (excluding VAT), you must provide proof of competitive tendering procedures.?

Your proof should be a report on the tenders you have received, together with your decision on which to accept. You must give full reasons if you do not select the lowest tender. Depending on the nature of your project you may be required to comply with UK Procurement Legislation.?

If a project partner is providing goods or services paid for through the grant, then you need to tell us why they have been chosen and why an open tender process is not appropriate. We will consider whether this is the best way to carry out your project and expect you to show value for money and meet any relevant legal requirements.?

Partners are not subcontractors. They will take on an active role in the project and will be involved in the?project. They will help to report on progress, attend regular partnership meetings and support project evaluation. We will ask to see your partnership agreement as a supporting document with your application.?

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 still need to provide a job description for this 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?
- if you are a voluntary organisation and are including a proportion of a staff member's time in your full cost recovery calculation?

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 £9,999, (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.

Insuring works and property

We need to protect National Lottery investment and so we ask you, with your contractors, to take out insurance for any property, works, materials and goods involved. All of these must be covered for their full reinstatement value against loss or damage, including inflation and professional fees.

If your project is affected by fire, lightning, storm or flood to the extent that you cannot achieve the outcomes set out in your application, we may have to consider claiming back our grant payments.

State aid and subsidy control

At the point of publication of this Guidance for Applicants, public funding for organisations is no longer governed by the European Commission's 'State aid' rules as set out in Article 107-109 of the Treaty of the Functioning of the European Union and associated regulations and guidelines. Instead all grant decisions made after 11pm on the 31st December 2020 are subject to the new UK subsidy control regime, the principles of which are set out in Chapter 3 (Subsidies) of Title XI (Level Playing Field) of the Trade and Cooperation Agreement.

There is expected to be further guidance, a consultation and possibly new legislation in this area to build upon those principles. You will be expected to comply with the principles of the subsidy control regime and to satisfy any future requirements. Agreements that have been entered into will be reviewed and varied accordingly. We reserve the right to impose further requirements and additional conditions in relation to this matter.

It is an applicant's responsibility to check whether State aid or subsidy control clearance is required. Applicants should seek independent legal advice if they are unsure whether a project will require clearance.

Expand All accordions

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
- ownership requirements for community grants

Evaluation budgeting and reporting

We recommend budgeting for evaluation in the following ways:

- Projects between £250,000 and £1m should allow a budget of between 2% and 7% of their total projects costs and consider using independent external evaluators. Evaluation budgets for projects within this scale should not be less than the minimum permitted. For example, if a project applies for funding of £255,000 we would expect a minimum of £5,100 (2%) to be allocated to evaluation, unless there is evidence provided in the description section of evaluation cost heading that this level of resource is not needed or appropriate.
- Projects over £1m should allow a budget of up to 7% of the total project costs and always consider using independent external evaluators. Evaluation budgets for projects over £1m should not be less than £20,000, unless there is evidence provided in the description section of evaluation cost heading that this level of resource is not needed or appropriate.

You must send us an evaluation report before we pay the last 10% of your grant. 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 its money 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 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 participants and (where appropriate) visitors you have engaged, 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. For larger projects involving capital works, we will ask for some of this information again, five years after project completion and 10 years after project completion.

An evaluation questionnaire has been included below which gives you an outline of the data you will need to collect during your project. For visitors, volunteers, trainees and staff, we also ask for demographic details by gender, age, ethnicity, sexual orientation, disability and social class.

These numbers will not, on their own, 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.

Evaluation questionnaire

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, skill sharing, 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 on evaluation, read the guidance on our website

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

With your application you will need to provide:

- 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. Unless, however, the acquisition directly relates to saving collections at risk. In that circumstance, the collection, or part of that collection, should be at risk of loss from the public domain due to the organisational failure of the current owner.

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. 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. 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.

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.

The lead applicant for the project must however be a not-for-profit organisation or a public body if your grant request is for £100,000 or more.

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. However, 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 however 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 the landowner agreements to ensure compliance with these requirements. The land owner 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 which 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.

Community grants

You may wish to make payments to third party owners (including private owners) for activities and capital works that contribute to achieving outcomes for heritage, people or communities (we call these Community Grants). If you are the lead applicant, you are responsible for ensuring that the specific project outcomes are delivered by third party landowners (including private owners) and that the terms of grant are complied with, including repayment of the grant if necessary.

This should be formalised through third-party agreements that define the outcomes to be delivered on third party land and secure the management and maintenance of capital works from the start of the work on the project until 10 years after the project's completion. This should be a legal agreement between you and the Community Grantee.

For examples of the sort of terms and conditions you may wish to include in your contractual agreements please see the Community Grants guidance.

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 development 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 and other essential reading
- 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 prepared all the mandatory supporting documents

When you are ready, submit your Expression of Interest 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.

Guidance 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:

- **24 November 2022:** new guidance for capital works inflation costs was added to the 'What can we fund?' section.
- **1 March 2023:**
    - It was previously stated that the priority outcomes would remain in effect until the end of the 2022-23 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 development stage and delivery stage application form questions and help notes was included.
- **30 May 2023:** the size of grants available to apply for has increased from £5million to £10million. References to the maximum grant amount have been updated throughout this guidance.
- **16 November 2023:** we are no longer accepting development round applications for grants over £250,000 (delivery round applications and Expressions of Interest are not affected). This programme will reopen in January with new Heritage 2033 guidance and forms.