Receiving a grant guidance: Heritage Innovation Fund

05/07/2022

See all updates

This guidance sets out how you will receive your Heritage Innovation Fund grant. It also explains what we expect of you.

Page created: 5 July 2022

Page last updated: 17 September 2026. See all updates.

Congratulations on being awarded a grant.

We hope this funding will give you the space, time and right support to explore your identified challenge and start to develop innovative solutions that will strengthen the heritage workforce for the future.

The funding you will receive is public money from National Lottery players. As such, we are duty-bound to ensure that it is managed in an accountable way. This means that there are a number of processes that you need to follow throughout the life of your grant. We try to make these proportionate in line with the level of grant you are receiving.

We like to work in a collaborative way, so please keep in touch with us if you need our support or have particular insights you would like to share.

Your first point of contact is the person named in your notification email.

How we work with you

Reporting progress

This funding is about supporting your organisation to spend time exploring the problem area you have identified. We are really interested to learn from what you do over the next six months. We want to hear about any unexpected discoveries or solutions.

We may also join some of the support partner cohort sessions to hear more about the work you are doing and what you are learning along the way.

Please keep us informed of any practical changes affecting your organisation that mean you are no longer able to do the work or engage with the support partner, including:

- significant delays meaning the work will not be completed within the six-month timeframe
- key staff leaving and how you will ensure the work continues at pace and within timeframes
- significant organisational restructure
- changes impacting on your financial stability or governance
- significant changes to the leadership of your organisation

Payments

Your grant is paid in three instalments:

1. You will receive **50%** of your grant once you have received permission to start your project.
2. You will receive the next **40%** once you can evidence that the first 50% of the total project costs have been spent.
3. We withhold the final **10%** of your grant until the project is completed. We will only pay this if the total project costs have been spent and are evidenced. This should be supported by your **completion report**.

Evidence of expenditure

Keep all invoices and receipts related to project expenditure as evidence.

Please provide either a finance ledger or a signed letter outlining staff costs (we do not need to see copies of payslips for any staff appointed for the project).

For amounts of less than £250 you should provide a separate table of costs for each cost heading which specifies the date, amount and description of each item of expenditure. The total of your table should match the single entry you input on your project costs table using the relevant cost heading.

Important documents

Your grant contract with us, the funder, is made up of the following:

- Your grant and project **Terms and Conditions**. Find this in the "Check your Project Details" page of our Get funding for a heritage project service.
- **any Additional Grant Conditions, if applicable**
- **Standard Terms of Grant**. If there are any inconsistencies between the Standard Terms of Grant and the Terms and Conditions, the Standard Terms of Grant will take precedence.
- the Receiving a Grant guidance on this page

If you do not comply with the grant contract, we reserve the right to request repayment of some or all of your grant.

Before starting your project, please also read:

- Heritage Innovation Fund application guidance
- Acknowledging your grant
- Evaluation guidance

We recommend that all those closely involved in the delivery of your project are familiar with the application you submitted to us. In particular, the outcomes you hope to achieve.

Grant expiry date

Your grant expiry date is given in your notification email. It is based on the six-month duration offered for this type of grant and the complementary support.

You must complete your proposed work and submit your completion report and final payment request form by the grant expiry date.

If you experience delays in delivering your project, you can request an extension to the grant expiry date. However, the complementary non-financial support cannot be delivered beyond the six-month grant period. Significant delays may also impact on your ability to apply for any next stage funding we may offer.

We aim to be flexible but cannot guarantee an extension. If your project takes significantly longer than six months to complete from the date of your notification email, we may terminate your grant and ask for the repayment of all or part of your grant.

Project timeline

Before starting the six-month grant period you will need to:

- await receipt of your grant award notification
- submit signed legal agreement documents
- attend a cohort start-up meeting with our support partner prior to formal grant commencement

The overall grant and support duration is six months. During this time you will need to:

- define your challenge and develop potential solutions
- take part in the regular support partner sessions led by The Young Foundation
- send a completion report to your Investment Manager to release final payment

Support programme

The six-month Explore phase grant of £25,000 sits alongside an innovation learning and development programme, led by The Young Foundation. **Participation in the support programme is key to receiving your grant**.

This support will help individuals and teams to build their confidence, skills and capabilities in innovation practice.

- There will be six 3.5hour online sessions (approximately one session per month) with all programme participants.
- There is also an offer of individual/team coaching support over the six months.

Please factor participation into your resource planning.

If your named contact cannot attend a session or leaves your organisation, your organisation is expected to arrange suitable cover. Failure to do this may result in some or all of your grant being repaid.

Content will include:

- learning with others – through taking action and testing ideas, and regularly coming together with others to review progress and reflect on what we are learning about how innovation and change happens
- innovation practice – sharing and explaining tools that could be used to gather insight and hone definition of your problem
- leading change – exploring aspects of change management that will allow organisations to open up to experimentation and new ways of working

Delivering your project

Evaluation

You are not required to undertake a formal evaluation of the funded work.

However we may ask you to give feedback and share your reflections as we are keen to learn about what we could improve about this programme.

Promotion of your National Lottery grant

Promoting and acknowledging The National Lottery is a condition of the grant contract.

Read more about acknowledging your grant.

You must acknowledge your grant publicly as soon as your project starts by displaying the National Lottery acknowledgment logo.

You must also make sure you include the National Lottery logo on any information you produce about your project, for example, on public consultation materials. You must also include the logo on all designs or plans you produce, on all specialist reports or surveys, and on all tender documents or job adverts that are funded by your grant.

If you do not comply with our acknowledgment guidelines, we reserve the right to stop making payments and to request repayment of some or all of your grant.

If you need any help or have any questions about acknowledging your grant, please get in touch with us.

Grant publicity

It is important to publicise your grant award to local media so that National Lottery players know where their money is being spent. We will publish the fact that you have been awarded a grant on our website within 20 days of your grant being awarded.

We can assist you with queries about publicity and the media. We have template press releases on our website. The templates include the correct wording, so you will just need to insert your project information where required.

Recruitment of staff

All staff posts must be advertised with the following exceptions:

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

We may ask to see evidence of the recruitment procedure you followed so keep these records safe. If you are moving an existing member of staff into a post created by the project, then we can either pay for the cost of this member of staff,

or for the cost of backfilling their post (where an employee is assigned to a new job and their position is temporarily filled by another employee), whichever cost is less.

If you wish to appoint any new members of staff on your project who are linked with any members of staff at your organisation, for example, any close friends, relatives, or former members of staff, you will need to obtain written permission from us first.

All salaries should be based on sector guidelines or similar posts elsewhere.

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.

Photographic record

You may wish to capture photographs showing your progress which you can share as part of your completion reports. When completing your completion report and final payment request form you can let us know if relevant photographic material from your project is available on the internet and where it can be found.

We may make use of your images in publicity material. By sharing them with us you give us the right to use those you provide us with at any time, including altering them. You must get all the permissions required for you and us to make use of them before you use them or send them to us. These images, along with other digital outputs from your project, should also be shared with an Open Licence (Creative Commons Attribution 4.0 International). If you are not the rights holder, you must ensure you have agreement to share these images under this specified Open Licence.

As part of this, you should ensure that you collect appropriate written consent from anyone who appears in these images that they can be reused in relation to publicity and promotional materials, and that they can be shared online under the specified Open Licence. This is particularly important where images include young people or vulnerable adults and where specific permission must be sought in advance. If you require any guidance on this, please speak to us.

If your images are not suitable for sharing under an Open Licence, other arrangements will need to be put in place. Please speak to us as soon as possible.

Online forms and portal login

You will need to fill in a total of four online forms during project delivery. All forms can be found on our Get funding for a heritage project service.

To log in, you will need to use the email address and password you used when applying for a grant. If your email address has changed since you submitted your application, contact your local Heritage Fund office or your Investment Manager.

Legal agreement and payment request form

We expect you to submit your signed legal agreement within two weeks of the date of your email notification.

If there are substantial delays and it has not been received within six weeks, we may decide to withdraw the offer of your grant.

The legal agreement must be completed by at least two signatories. By signing the Declaration, you are confirming that your organisation accepts your grant and agrees to comply with the grant contract. You should keep a signed copy for your records.

Once we have approved your request we will inform you and we will authorise the first payment of your grant. You can then start work on your project. You should not start any work on your project until you have our written permission to do so. If you do so it is at your own risk.

Projects completing under budget

If you spend less than your agreed costs and your project completes under budget you will need to return to us any part of the grant that has not been spent.

If the underspend is less than 10% of your grant we will adjust the final payment of your grant accordingly. If the underspend exceeds 10% of your grant, you will need to return the unspent grant to us via cheque or BACS transfer (bank details are available upon request).

Your final payment will be calculated based on your overall project costs.

Page updates

- **19 January 2023:** Mentions of mid-point progress reports were removed, as these are no longer required.