Application questions: £250,000 to £10million

30/01/2024

See all updates

Questions from our National Lottery Heritage Grants £250,000 to £10m application.

Page last updated: 3 July 2026. See all updates.

Before you can apply for a grant over £250,000, you must submit an Expression of Interest to tell us about your idea. If you are successful, we will invite you to apply. After you are invited to apply, you will have 12 months to submit an application.

Use this page to:

- see what questions appear in the application for both the development and the delivery phases
- get guidance on how best to answer the application questions

Each question has a word limit; however, you don't need to reach this. Only include the information we ask for that is relevant to your project.

Explore our position and advice on using artificial intelligence (AI) tools in your grant application.

Development phase application questions

About the project

Name of your organisation.

[This cannot be adjusted]

Project reference number.

Projects which successfully pass their Expression of Interest and are invited to apply are given a project reference number.

[This cannot be adjusted]

Project title.

Give us a title or name we can refer to your project by.

This will be seen by our decision makers, and if your application is successful, will be used in any public posts made about your project and will be published on our website. Make sure you choose a title that you are happy for a wide range of people to see.

[Text field – 255 characters]

Is this your organisation's first application to the Heritage Fund?

[Select yes or no]

If yes: Tell us the reference number of your most recent application.

[Text field – 255 characters]

Tell us the project title of your most recent application.

[Text field – 255 characters]

Describe what your organisation would like to achieve through your project.

We will use your answer to tell people about your project including our decision makers.

Tell us what you hope to achieve and what you hope the legacy of your project will be.

We publish details of applications and grant awards on our website and in public databases. This is in line with our commitment to transparency and open data principles. We will use the information you have provided when answering this question to describe your project.

[Text input – 150 words]

Tell us what you will do during your project.

Provide a detailed overview of what you will do during your project.

For example, describe any:

- activities that you will be doing
- events that you will be hosting
- items or resources that you will be creating
- heritage items or buildings you will be restoring
- landscapes you will be improving

This helps us to understand what your project is all about.

[Text field – 5,000 characters]

Where will your project take place?

- Project street [Text field – 255 characters]
- Project city [Text field – 255 characters]
- Project county [Text field – 255 characters]
- Project post code [Text field – 100 characters]

For landscape projects, please provide an Ordnance Survey grid reference for your landscape.

[Enter reference]

Explain what need and opportunity your project will address.

Tell us about any problems and opportunities there are relating to how:

- your heritage is managed now and its condition
- people engage with the heritage now

Tell us how your project will address the above two problems and opportunities, and how your project fits with any local strategies or wider initiatives. Tell us about any feasibility and options appraisals that have been carried out and why your project is the best and most viable way forward. If your project will improve an area of landscape or townscape, tell us about the current condition of the area.

[Text field – 5,000 characters]

Why does your project need to happen now?

Tell us:

- if the risk to your heritage is critical
- about any partnership funding that is available to you now that won't be in the future
- what will happen if you do not get a grant from us

[Text field – 5,000 characters]

Who else have you approached about funding your project?

At this grant level you must contribute towards the costs of your project, depending on the amount of grant you are applying for.

Tell us about any funding:

- you have secured to help towards the cost of your project
- you are planning to apply for to support this project
- you will raise through fundraising or crowdsourcing

If you are providing the minimum required, or you are unable to provide any partnership funding, please explain why.

Tell us if you have raised any non-cash contributions to help you deliver your project.

[Text field – 5,000 characters]

Tell us what advice you have received in planning your project and from whom.

If you have spoken to anyone from The National Lottery Heritage Fund about your project, tell us about the advice you received and how you have used that advice to develop your project.

Tell us if you have received any specialist advice about your project from anyone else. This could be experts in the heritage your project focuses on or other organisations who will support you to deliver your project.

This could include:

- any consultation you have done with your local community and those who will be involved in your project
- any project proposal advice, such as from an architect or conservator
- any pre-application advice on planning and/or listed building consent matters, such as from your local authority or an archaeologist
- advice about how to address wellbeing for your project participants, such as from a charity or local group who can provide support which is relevant to their lived experience

[Text field – 5,000 characters]

Will your project be delivered by a partnership?

Tell us who your partners are, the nature of your partnerships and how you will work together.

If you are working with any other organisations to carry out your project, we would like to see your partnership agreement. This document should outline all partner's roles and responsibilities and should be signed by all parties. This agreement should reflect the needs of your project and you may need to seek independent advice.

You do not need to provide a partnership agreement unless any other organisations are delivering a significant part of your project.

Tick if yes.

[Tick box]

Who are your partners? Please provide a named contact from each organisation.

[Text field – 5,000 characters]

Will any of your project take place in Wales?

- No, none of our project will take place in Wales [Tick box]
- Yes, all or some of our project will take place in Wales [Tick box]

If yes: Tell us how the Welsh language will be used in your project.

If your project will take place in Wales, you must include the Welsh language in all aspects of your work.

Please tell us how you will use the Welsh language in your project, and make sure that this information is included in your project budget and plan. Please include budget for translation costs under the 'Other' costs category in the project costs section.

[Text field – 500 words]

About the heritage

Tell us about the heritage in your project and why it is important to your organisation and community.

Provide a description of the heritage as it is today. If different types of heritage are involved, describe each of these.

Provide factual information about the heritage. For example:

- If your project is about heritage that is not physical (such as memories or cultural traditions), tell us about the subject and time period, if relevant.
- If your project is about physical heritage (such as a building, ship, historic object, collection or nature reserve), give us factual information about it, such as its size, when it dates from, the surviving features, its condition and why it is important to your local area.

Tell us:

- if there is any official recognition of this heritage, for example, it may be a listed building (if so, tell us its grade) or a Site of Special Scientific Interest
- what is important about the heritage, for example it may be a source of artistic, architecture or scientific interest
- who the heritage is important to, such as experts and/or the local community
- why the heritage is distinct or unique
- how the heritage relates to other heritage, for example in the local area or nationally

[Text field – 5,000 characters]

Is the heritage considered to be at risk?

Tick if yes.

[Tick box]

Explain why and how you consider the heritage to be at risk.

Explain why the heritage is under threat, and what actions have been taken (if any) to minimise the risk.

For example, it could be at risk of loss through physical damage or neglect, or financial shortfalls. In the case of oral and community histories, it could be at risk of loss through people passing on. Public access to the heritage may also be at risk of loss.

If your project involves a building or a monument, tell us if it is on a buildings or monuments at Risk Register, for example Historic England’s Heritage at Risk Register.

If your project involves several buildings in a conservation area, tell us if the conservation area is on an at Risk Register.

If your project involves natural heritage, tell us if the landscape, geology, habitat or species is at risk and in what way (for example, identified in a Biodiversity Action Plan as a priority).

Tell us:

- the current condition of the heritage
- how it is currently managed and by who
- how people currently engage with the heritage

[Text field – 5,000 characters]

Has a condition survey been undertaken for the heritage asset in the last five years?

Tick if yes.

If your project involves the conservation of heritage, you must provide a condition survey or another appropriate document (for example, 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 place of worship, 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 proposed works so you know which are the most critical and need to be tackled most urgently.

There are other types of survey which could take place, including a building performance and energy efficiency survey, or a site survey which assesses the services and use of the site. An archive might also need a condition survey or audit, which is usually done by an archivist.

If you have had any kind of condition survey done, you can upload it later in the application.

[Tick box]

Will you be undertaking any capital work as part of your project?

Tick if yes.

[Tick box]

If yes: please provide details.

Capital works are defined as works that create or improve an asset. These can include physical works to landscapes, nature and buildings, repair, conservation, new build, digitisation, or work to stabilise the condition of objects.

Examples of capital work:

- conservation of a heathland
- repairs to a historic building
- digitisation of a photographic archive

Tell us if any capital works will be part of your project, even if this is a small part of your overall project. Give us an initial breakdown of the work you intend to carry out.

[Text field – 5,000 characters]

If you are undertaking any capital work (including repair or refurbishment) to land, buildings or heritage items, tell us who owns it.

- your organisation
- project partner
- neither
- N/A

Please provide details about your capital works owner.

If capital works are part of your project, you will need to tell us who owns the heritage. If you have them, we need to see any ownership documents. You can upload these later on in the application.

If your organisation owns the heritage, tell us:

- if your organisation has the freehold of the building or land, or own outright the heritage items
- if your organisation has the lease of the building or land and how many years are left to run on the lease
- If your organisation has, or is planning to take out, a mortgage or other loans secured on the building or land, or heritage item. If so, give us details of the lender and the amount of the mortgage or loan.

If a partner organisation owns the heritage, tell us:

- the name of the partner organisation
- if the project partner has the freehold of the building or land, or own outright the heritage items
- if the project partner has the lease of the building or land and how many years are left to run on the lease
- if the project partner has, or is planning to take out, a mortgage or other loans secured on the building or land, or heritage item
- if so, give us details of the lender and the amount of the mortgage or loan

If you do not currently meet our ownership requirements, tell us the date when you expect to do so. If you have any ownership documents, you can upload them later in the application.

[Text field – 5,000 characters]

Are there are legal conditions, restrictions or covenants associated with the heritage asset which may affect your project?

[Tick box]

Please provide details.

Tell us if the register of title or other ownership documents contain any restrictions or limitation on its use or ownership, or if it requires any consents for any dealings. If so, you will need to give us the full details and evidence that these are satisfied.

This could include:

- a Restrictive Covenant limiting the type of use for the land or property

- a restriction giving another party a right to be notified of any dealing or state conditions that would need to be resolved before the property is sold

[Text field – 5,000 characters]

Does your project involve the acquisition of a building, land or heritage items?

Select one of:

- yes
- no
- N/A

Managing your project

Has your organisation taken on a project of this scale in the last five years?

[Tick if yes]

If yes: please provide details.

[Text field – 5,000 characters]

Tell us why this is the most appropriate project for your organisation to take on at this time.

What other strategies have been considered? What will you do if the project does not go ahead?

[Text field – 5,000 characters]

Our funding is subject to the Subsidy Control Act 2022. Tell us whether you consider the funding applied for to be a Subsidy within the Act and any advice you may have taken.

If your application is successful, it is important to remember our grant comes from public funds and may be subject to the Subsidy Control Act 2022.

Find out more about subsidy control in the Legal and policy requirements section of the programme guidance.

[Text field – 500 words]

Does your organisation need to undertake any capacity building activity to better deliver your project?

For example, do you need to review your financial or HR system, develop your business plan or build fundraising capacity? Do you need to bring in any extra skills or expertise?

Tell us whether you will be making changes to the governance of your organisation to enable you to deliver your project more effectively. You can include the costs of professional support for a governance review in your project costs.

[Text field – 5,000 characters]

Tell us about any jobs or apprenticeships that you will create to deliver your project.

Provide an estimate of any jobs and/or apprenticeships that will be created and will be directly involved in delivering your project. Tell us what their main roles will be and whether they are full-time or part-time positions.

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, tell us how they are qualified for the role created by the project.

Describe how you will choose the staff.

You will need to provide a job description for each role created for the development phase of your project as a supporting document to your application.

[Text field – 5,000 characters]

What work will you do during the development phase of your project?

Tell us about the key tasks you need to complete during your development phase. Tell us how you will produce all of the supporting documents required for your delivery phase application.

[Text field – 5,000 characters]

Who are the main people responsible for the work during the development phase of your project?

Provide detailed information about the team that will work on your development phase, including the person who will take overall responsibility.

Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place.

Describe how you will choose the services and goods needed during your development phase.

You will also need to send us briefs for any consultants for your development phase. You can upload these later in the application.

[Text field – 5,000 characters]

Who are the main people responsible for the work during the delivery phase of your project?

Provide detailed information about the team that will work on your delivery phase, including the person who will take overall responsibility.

Tell us if you will need extra support from consultants or new staff.

Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place.

Describe how you will choose the services and goods needed during your delivery phase.

You will also need to send us:

- project management structure
- briefs for any consultants

If you are sending us a project business plan, tell us where to find the information above in this. You can upload any of these supporting documents later in the application.

[Text field – 5,000 characters]

What work will you do during the delivery phase of your project?

Provide outline information about what your project will do during your delivery phase.

[Text field – 5,000 characters]

How do you plan to cash flow the delivery phase of your project?

Grant payments are made in arrears. You therefore need to ensure you are able to successfully cash flow the expenditure of your project in order to avoid experiencing financial difficulties. The exception to this is a development grant of less than £250,000.

You will need to provide a cash flow with your delivery phase application.

Tell us about any financial reserves, income from your organisation or other sources of funding you will access to cash flow the delivery phase of your project.

[Text field – 5,000 characters]

Delivery start date.

This can be an estimate.

[Select date]

Delivery end date.

This can be an estimate.

[Select date]

Are there any fixed deadlines or key milestones that will restrict your project's timetable?

Please tell us about any immovable dates that will affect your project and are beyond your control.

For example:

- dates when partnership funding offers may expire or when secured funds must be spent by
- anniversaries that your project is designed to celebrate

- external events that are key to your project's success

[Text field – 5,000 characters]

Our investment principles

Our four investment principles will guide all our grant decision making under our 10-year strategy, Heritage 2033.

Our investment principles are:

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

You must take all four investment principles into account in your project. You may focus more on some investment principles than others.

For example:

- if your project is focused on restoring natural landscapes, you might want to emphasise both saving heritage and protecting the environment in your application
- if your project is focused on recording and sharing oral histories and skills development, you might concentrate more on inclusion, access and participation and organisational sustainability

The strength of focus and emphasis on each principle is for you to decide and demonstrate.

Explain how your project will save heritage.

[Text field – 5,000 characters]

Explain how your project will protect the environment.

[Text field – 5,000 characters]

Explain how your project will increase inclusion, access and participation.

[Text field – 5,000 characters]

Explain how your project will improve your organisational sustainability.

[Text field – 5,000 characters]

After the project ends

How will you maintain the benefits of your project and meet any related costs?

Tell us how you will manage the benefits of your project after the funding ends.

For example:

- what will happen to the things you produce as part of the project, for example if these will be donated to a local archive or kept on display by your organisation
- how you will manage the heritage in the future, for example if you will keep employing staff to help maintain a site you have restored
- how you will deal with any costs related to maintaining the heritage once the project ends, for example utility costs for a newly opened building

[Text field – 5,000 characters]

How will you evaluate the success of your project and share the learning?

You must evaluate your project and provide a written evaluation report once you finish your project.

You will need to create an evaluation plan at the start of your project. This will be an outline of how you are going to collect data to measure, analyse and understand what you are doing and ultimately to provide evidence about what your project has achieved.

Tell us who will carry out your evaluation. This could be staff within your organisation or a person or organisation who you will need to employ. You should provide a brief for this work as a supporting document.

We would expect to see costs for your evaluation included in your project costs.

[Text field – 5,000 characters]

Project costs and income

Tell us about the costs and income for your project.

This includes both your development phase and your potential delivery phase.

You should include all costs and income relating to your project.

There are different headings for each cost type you can choose from, and for each type of income you might receive to support your project.

Choose the income type which best suits each source of income you will be receiving.

More information about the delivery phase project costs and income can be found in the delivery phase application questions below.

You will be shown a summary of your total project costs and income.

Development phase project costs:

Capacity building activity

- This includes anything you may need to do to increase your organisation's capacity to deliver the project. This might include a review of your human resources or finances, bringing in extra skills or expertise, or making changes to the governance of your organisation.

Opening-up works/surveys

- This can include any initial surveys or reports you may need to have done on a site, building, landscape or resource.

Professional fees

- Include costs for any services you will need to pay for during your project. For example, a building surveyor, landscape architect or a conservator.
- Fees should be in line with professional guidelines and based on quotes from the professional or professional body you are paying.

Recruitment

- This can include the cost of advertising and any travel expenses for interviews. We expect your organisation to keep to good human-resource practice and follow all relevant laws.

Full cost recovery

- Full cost recovery is a cost type used to cover indirect costs of a project. Indirect costs include overheads, or costs which are not directly related to the project your organisation is delivering, but which are essential for the running of your organisation.
- If you are an organisation in the voluntary sector, we can cover a proportion of your organisation's overheads, which must be appropriate to the time or resources used for your project. 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
    - rely upon volunteers to carry out their aims

Other costs (development phase)

- Include development phase costs that do not fit within any of the other cost headings. Please make sure you give a clear description of what these costs are.
- You might include costs here for any scoping or planning work you will do to address the investment principles during your project.
- If your project is taking place in Wales, make sure you include sufficient costs for translation into the Welsh language.
- You may also wish to include costs for reasonable adjustments here.

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 volunteer time.
- Volunteer time must be included in both the cost and income section of your application. This is because we recognise the value of this contribution.

Non-cash contributions

- This is 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.
- Non-cash contributions must be included in both the cost and income section of your application. This is because we recognise the value of this contribution.

New staff

- Include costs for staff who will be working on your project. Make sure to also include any applicable on-costs.
- This could include new fixed-term contracts, secondments, apprenticeships and the costs of freelance staff to help deliver your project. Do not include the costs of paying trainees here.
- In some circumstances it may be appropriate to include costs for maternity leave and/or redundancy payments. We expect your organisation to keep to good human-resource practice and follow all relevant laws, including paying at least the National Living Wage to all project staff members.

Contingency

- This cost heading is mandatory. Contingency is used to pay for unexpected costs required to deliver your project.
- We would expect the amount of contingency included to help manage your identified challenges or risks. It should also reflect the scale of your project.
- Make sure that you only include your required contingency here and not within the other cost headings in your application.

Development phase project income:

- local authority
- other public sector
- central government
- private donation – individual
- private donation – trusts/charities/foundations
- private donations – corporate
- commercial/business
- own reserves
- other fundraising

- loan/finance
- non-cash contributions
- volunteer time

Supporting documents required during the development phase

Before we assess your application, we need to see your supporting documents.

Some supporting documents are mandatory – these are documents which every project must provide for their development phase application. Other supporting documents are only mandatory if they apply to your project: for example, if you are commissioning any work, we will need to see briefs for that work.

Choose a clear, descriptive file name for each supporting document so we can easily identify each one.

Supported file types: .jpg, .doc, .docx, .pdf, .xls, .xlsx, .ppt, .pptx, .zip, .kml, .csv, .bmp, .tiff, .rtf, .png, .txt, .msg, .mp4, .eml, .ods, .odt, .webp

[Upload files]

List of supporting documents for the development phase:

Timetable for the development phase

This should be a detailed timetable for the development phase of your project. This is a **mandatory** document for all development phase projects.

Risks for the development phase

This is a document, known as a risk register, which tells us about any risks to the development phase of your project and how they will be managed. This is a **mandatory** document for all development phase projects.

Timetable for delivery phase

This should be a summary timetable for the delivery phase of your project. This is a **mandatory** document for all development phase projects.

Risks for the delivery phase

This is a document, known as a risk register, which tells us the risks to the delivery phase of your project and how they will be managed. This is a **mandatory** document for all development phase projects.

Main risks document for after the project is completed

This is a document to tell us about the main risks facing the project after it has been completed and how they will be managed. This is a **mandatory** document for all development phase projects.

Accounts

You must provide your most recently audited or accountant verified accounts for the last three years and your management accounts for the current year. Accounts need to be:

- in the **legal name** of your organisation
- **dated**
- signed with a **handwritten signature**; this does not include digital signatures
- Include the **title** of the person who is signing them. This person must be a director, trustee, accountant, or other senior figure in your organisation.

If your organisation's accounts are older than 18 months, you must also provide three months of your most recent bank statements. This should be the three months before the date you submit your application.

If your organisation was set up less than 14 months ago and does not have a set of audited accounts, you must provide your last three bank statements or a signed letter from your bank confirming that your organisation has opened a bank account.

We do not need to see your accounts if you are a public organisation, for example a local authority or university.

This is a **mandatory** document for all development phase projects unless your organisation is exempt from providing them.

Detailed cost breakdown

You must provide a spreadsheet detailing the costs you outlined when completing the project costs section of your application.

We require a detailed spreadsheet of project expenditure and income, with reference to the budget headings used in your application, itemising each aspect.

This is a **mandatory** document for all development phase projects.

Partnership agreements

If you plan to work with a partner to carry out your project, you will need to provide a partnership agreement. This document should outline both partner's roles and responsibilities and should be signed by all parties. This document should reflect the needs of your project and you may need to seek independent advice on how to best write an agreement.

A partner is another organisation or third-party body that is integral to the delivery of your project, for example the owner of an item, building, land or collection that is involved in your project. 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.

Job descriptions

If you plan to recruit new staff or apprentices to help you deliver your project, you need to provide a job description for each new post. Each job description should include the proposed salary and working hours.

Briefs for commissioned work

Briefs describe any work you plan to commission during the development phase of your project. If you are commissioning work, for example, from an artist or an architect, then you should upload a brief.

The brief should describe the works, how long they will take, and how much they will cost.

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

Images

You should provide up to six images that help illustrate your project. For example, an image of a map of the area showing the locations involved in your project, if it is taking place across more than one place or across a large area.

Please make sure you have all the permissions required to share these with us, as we may use these to tell people about your project, including our decision makers. If your project is successful, we may use any images to promote your project.

Evidence of support

You should provide up to six pieces of evidence of support from other organisations or individuals who are committed to helping deliver your project or are key to your project's success. This could include:

- permission from landowners to access sites
- confirmation from a local museum that they will host your exhibition
- confirmation from a local community group that their members will take part in your planned activities
- offers of support from other funding organisations
- independent valuations for land, buildings or heritage items you intend to buy

We do not need to see general statements in support of your project.

Calculations of full cost recovery included in your development phase costs

If you have included full cost recovery as a cost heading in your project costs, you must provide a document that shows how you have calculated this. 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 cannot accept applications that include full cost recovery from public sector organisations (for example, government-funded museums, local authorities or universities).

Business plan

You must submit your organisation's current business plan. A business plan is not the same as a project plan. It focuses on the overall organisation and not specific project activities.

If you do not have a business plan, please upload the document you work with to manage your heritage. If you are an organisation which manages multiple sites or are, for example, a Local Authority, upload the documents most relevant to the heritage. This is a **mandatory** document for all development phase projects.

Condition survey

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

The survey or report should also indicate the relative priority of the proposed works so you know which are the most critical and need to be tackled most urgently. There are other types of survey which could take place, such as a building performance and energy efficiency survey.

Ownership documents

If you are planning any capital works, or intending to purchase land, buildings or collections, please provide copies of any relevant ownership documents. For example, Land Registry ownership documents or a lease or heads of terms.

Heritage Enterprise supporting documents

If you are making a Heritage Enterprise application, you should also upload:

- a viability appraisal that provides a reasonable indication of the conservation deficit
- design specification for any capital works to be undertaken during the development phase
- Two or three of the most recent and relevant documents that describe the vision and strategy for the area, if applicable. For example, documents from the local development framework, area action plan, master plan, regeneration strategy or tourism strategy.

Declaration

Confirm declaration

We run qualitative user research to help us to develop our products and services. This could be from a 20-minute survey to a two-hour interview.

Tick this box if you would like to be involved in our research, or find out more. [Tick box]

I have read and agreed with the declaration. [Tick box]

a) Data Protection

We are committed to being as open and transparent as possible. This includes being clear about how we assess and make decisions on our grants and how we will use your application form and other documents you give us. We follow all data protection laws and regulations that are applicable and in force from time to time (the 'Data Protection legislation'). As defined by the Data Protection legislation the Trustees of the National Heritage Memorial Fund (who administer the National Lottery Heritage Fund) is a data controller. Our Privacy Policy contains additional information including contact

information for our Data Protection Officer. It can be found on the National Lottery Heritage Fund website.

As part of the application process we will collect your name, contact information and position at the organisation you represent as well as any additional personal information you supply about others involved in your project. We may share this information with one of the consultants on our Register of Support Services if they are appointed to help support you on your project. We do not transfer your data to any third parties based outside of the EU.

We may use your application form and other documents you give us, and the data contained within:

- To decide whether to give you a grant.
- To provide copies to other individuals or organisations who are helping us to assess, monitor and evaluate grants.
- To share information with organisations and individuals working with us with a legitimate interest in National Lottery applications and grants or specific funding programmes.
- To hold in a database and use for statistical purposes.
- If we offer you a grant, we will publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and in the publications or websites of relevant Government departments and any partner organisations who have funded the activity with us.
- If we offer you a grant, you will support our work to demonstrate the value of heritage by contributing (when asked) to publicity activities during the period we provide funding for and participating in activities to share learning, for which we may put other grantees in contact with you. This may include sharing your information and any subsequent publicity with third party partner distributors.

b) Freedom of Information

As a public organisation we are subject to the Freedom of Information Act 2000 and Environmental Information Regulations 2004 which give the public a right of access to the information that we hold, unless any exemptions apply. This includes any recorded information provided to us by our applicants and grantees.

When you complete the Declaration at the end of the application form, you are confirming that you have no objection to us releasing the application form and any other information you provide to us to anyone who asks to see them once your application has completed the assessment process. If there is any information that you don't want made publicly available, please explain your reasons below:

[Text box]

If we receive a request for information we will always consult you first and will take your comments into account and will apply the exemptions in the Freedom of Information Act 2000 and Environmental Information Regulations 2004. However, the decision to release or withhold your information is our decision and we will not be responsible for any loss or damage you suffer as a result of our meeting these responsibilities.

We may contact you from time to time to keep you informed about the work of The National Lottery Heritage Fund.

[Tick box if you would like to be kept informed of our work]

- I confirm that the organisation named on this application has given me the authority to complete this application on its behalf.

- I confirm that the activity in the application falls within the purposes and legal powers of the organisation.
- I confirm that the organisation has the power, if awarded a grant, to accept and pay back the grant.
- I confirm that, as far as I know, the information in this application is true and correct.
- I consent to my personal data being used as described and understand that should the requirement change from that described I will be informed at the earliest convenience.

Delivery phase application questions

About the project

Project title.

Tell us the title of the project.

Is this your organisation's first application to us?

[Select yes or no]

If no:

Please tell us the reference number of your most recent application. [Text field – 255 characters]

Please tell us the project title of your most recent application. [Text field – 255 characters]

Describe what your organisation would like to achieve through your project.

We will use your answer to tell people about your project including our decision makers.

Tell us what you hope to achieve and what you hope the legacy of your project will be.

We publish details of applications and grant awards on our website and in public databases. This is in line with our commitment to transparency and open data principles. We will use the information you have provided when answering this question to describe your project.

[Text field – 150 words]

Tell us what you will do during your project.

Provide a detailed overview of what you will do during your project.

For example, describe any:

- activities that you will be doing
- events that you will be hosting
- items or resources that you will be creating
- heritage items or buildings you will be restoring
- landscapes you will be improving

This helps us to understand what your project is all about.

[Text field – 5,000 characters]

Where will your project take place?

- Project street [Text field – 255 characters]
- Project city [Text field – 255 characters]
- Project county [Text field – 255 characters]
- Project post code [Text field – 100 characters]

For landscape projects, please provide an Ordnance Survey grid reference for your landscape. [Text field – 5,000 characters]

If your project will take place across different locations, please use the postcode where most of the project will take place.

Explain what need and opportunity your project will address.

[Text field – 5,000 characters]

Why does your project need to happen now?

[Text field – 5,000 characters]

Who else have you approached about funding your project?

At this grant level you must contribute towards the costs of your project, depending on the amount of grant you are applying for.

Tell us about any funding:

- you have secured to help towards the cost of your project
- you are planning to apply for to support this project
- you will raise through fundraising or crowdsourcing

If you are providing the minimum required, or you are unable to provide any partnership funding, please explain why.

Tell us if you have raised any non-cash contributions to help you deliver your project.

[Text field – 5,000 characters]

Tell us what advice you have received in planning your project and from whom.

If you have spoken to anyone from The National Lottery Heritage Fund about your project, tell us about the advice you received and how you have used that advice to develop your project.

Tell us if you have received any specialist advice about your project from anyone else. This could be experts in the heritage your project focuses on or other organisations who will support you to deliver your project.

This could include:

- any consultation you have done with your local community and those who will be involved in your project
- any project proposal advice, such as from an architect or conservator
- any pre-application advice on planning and/or listed building consent matters, such as from your local authority or an archaeologist
- advice about how to address wellbeing for your project participants, such as from a charity or local group who can provide support which is relevant to their lived experience

[Text field – 5,000 characters]

Will your project be delivered by a partnership?

[Select yes or no]

If yes: Who are your partners?

Provide a named contact from each organisation.

Tell us who your partners are, the nature of your partnerships and how you will work together.

If you are working with any other organisations to carry out your project, we would like to see your partnership agreement. This document should outline all partner's roles and responsibilities and should be signed by all parties. This agreement should reflect the needs of your project and you may need to seek independent advice.

You do not need to provide a partnership agreement unless any other organisations are delivering a significant part of your project.

[Text field – 5,000 characters]

Will any of your project take place in Wales?

- No, none of our project will take place in Wales [Tick box]
- Yes, all or some of our project will take place in Wales [Tick box]

If yes: Tell us how the Welsh language will be used in your project.

If your project will take place in Wales, you must include the Welsh language in all aspects of your work.

Please tell us how you will use the Welsh language in your project, and make sure that this information is included in your project budget and plan. Please include budget for translation costs under the 'Other' costs category in the project costs section.

[Text field – 500 words]

About the heritage

Tell us about the heritage in your project and why it is important to your organisation and community.

Provide a description of the heritage as it is today. If different types of heritage are involved, describe each of these.

Provide factual information about the heritage. For example:

- If your project is about heritage that is not physical (such as memories or cultural traditions), tell us about the subject and time period, if relevant.
- If your project is about physical heritage (such as a building, ship, historic object, collection or nature reserve), give us factual information about it, such as its size, when it dates from, the surviving features, its condition and why it is important to your local area.

Tell us:

- if there is any official recognition of this heritage, for example, it may be a listed building (if so, tell us its grade) or a Site of Special Scientific Interest
- what is important about the heritage, for example it may be a source of artistic, architecture or scientific interest
- who the heritage is important to, such as experts and/or the local community
- why the heritage is distinct or unique
- how the heritage relates to other heritage, for example in the local area or nationally

[Text field – 5,000 characters]

Is the heritage considered to be at risk?

[Select yes or no]

If yes: Explain why and how you consider the heritage to be at risk.

Explain why the heritage is under threat, and what actions have been taken (if any) to minimise the risk.

For example, it could be at risk of loss through physical damage or neglect, or financial shortfalls. In the case of oral and community histories, it could be at risk of loss through people passing on. Public access to the heritage may also be at risk of loss.

If your project involves a building or a monument, tell us if it is on a buildings or monuments at Risk Register: for example, Historic England’s Heritage at Risk Register.

If your project involves several buildings in a conservation area, tell us if the conservation area is on an at Risk Register.

If your project involves natural heritage, tell us if the landscape, geology, habitat or species is at risk and in what way (for example, identified in a Biodiversity Action Plan as a priority).

Tell us:

- the current condition of the heritage
- how it is currently managed and by who
- how people currently engage with the heritage

[Text field – 5,000 characters]

Will you be undertaking any capital work as part of your project?

[Select yes or no]

If yes: Please provide details.

Capital works are defined as works that create or improve an asset. These can include physical works to landscapes, nature and buildings, repair, conservation, new build, digitisation, or work to stabilise the condition of objects.

Examples of capital work:

- conservation of a heathland
- repairs to a historic building
- digitisation of a photographic archive

Tell us if any capital works will be part of your project, even if this is a small part of your overall project. Give us an initial breakdown of the work you intend to carry out.

[Text field – 5,000 characters]

If you are undertaking any capital work (including repair or refurbishment) to land, buildings or heritage items, tell us who owns it.

- your organisation
- project partner
- neither
- N/A

Please provide details about your capital works owner.

If capital works are part of your project, you will need to tell us who owns the heritage. If you have them, we need to see any ownership documents. You can upload these later on in the application.

If your organisation owns the heritage, tell us:

- if your organisation has the freehold of the building or land, or own outright the heritage items
- if your organisation has the lease of the building or land and how many years are left to run on the lease
- If your organisation has, or is planning to take out, a mortgage or other loans secured on the building or land, or heritage item. If so, give us details of the lender and the amount of the mortgage or loan. If you have one, upload an ownership document.

If a partner organisation owns the heritage, tell us:

- the name of the partner organisation
- if the project partner has the freehold of the building or land, or own outright the heritage items
- if the project partner has the lease of the building or land and how many years are left to run on the lease

- if the project partner has, or is planning to take out, a mortgage or other loans secured on the building or land, or heritage item
- if so, give us details of the lender and the amount of the mortgage or loan

If you do not currently meet our ownership requirements, tell us the date when you expect to do so.

[Text field – 5,000 characters]

Are there are legal conditions, restrictions or covenants associated with the heritage asset which may affect your project?

[Tick box]

Please provide details.

Tell us if the register of title or other ownership documents contain any restrictions or limitation on its use or ownership, or if it requires any consents for any dealings. If so, you will need to give us the full details and evidence that these are satisfied.

This could include:

- a Restrictive Covenant limiting the type of use for the land or property
- a restriction giving another party a right to be notified of any dealing or state conditions that would need to be resolved before the property is sold

[Text field – 5,000 characters]

Does your project involve the acquisition of a building, land or heritage items?

Select one of:

- yes
- no

Managing your project

Has your organisation taken on a project of this scale in the last five years?

Please provide details.

[Text field – 5,000 characters]

Tell us why this is the most appropriate project for your organisation to take on at this time.

What other strategies have been considered? What will you do if the project does not go ahead?

[Text field – 5,000 characters]

Our funding is subject to the Subsidy Control Act 2022. Tell us whether you consider the funding applied for to be a Subsidy within the Act and any advice you may have taken.

If your application is successful, it is important to remember our grant comes from public funds and may be subject to the Subsidy Control Act 2022.

Find out more about subsidy control in the Legal and policy requirements section of the programme guidance.

[Text field – 500 words]

Does your organisation need to undertake any capacity building activity to better deliver your project?

For example, do you need to review your financial or human resources system, develop your business plan or build fundraising capacity? Do you need to bring in any extra skills or expertise?

Tell us whether you will be making changes to the governance of your organisation to enable you to deliver your project more effectively. You can include the costs of professional support for a governance review.

What work have you undertaken to strengthen the capacity of your organisation to deliver this project during the development phase?

[Text field – 5,000 characters]

Tell us about any jobs or apprenticeships that you will create to deliver your project.

Tell us about any jobs and/or apprenticeships that will be created and will be directly involved in delivering your project. Tell us what their main roles will be and whether they are full-time or part-time positions.

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, tell us how they are qualified for the role created by the project. Tell us how you will manage the work they are currently doing, or if this is coming to an end.

You will need to provide a job description for each role created for the delivery phase of your project as a supporting document to your application.

[Text field – 5,000 characters]

Who are the main people responsible for the work during the delivery phase of your project?

Provide detailed information about the team that will work on your delivery phase, including the person who will take overall responsibility.

Tell us if you will need extra support from consultants or new staff.

Explain who is responsible for making decisions and approving changes to your project. Describe the reporting structure and how often meetings will take place.

Describe how you will choose the services and goods needed during your delivery phase.

You will also need to send us:

- project management structure
- briefs for any consultants

If you are sending us a project business plan, tell us where to find the information above in this.

[Text field – 5,000 characters]

What work will you do during the delivery phase of your project?

Provide outline information about what your project will do during your delivery phase.

[Text field – 5,000 characters]

How do you plan to cash flow the delivery phase of your project?

Grant payments are made in arrears. You therefore need to ensure you are able to successfully cash flow the expenditure of your project in order to avoid experiencing financial difficulties. The exception to this is a development grant of less than £250,000.

You will need to provide a cash flow with your delivery phase application.

Tell us about any financial reserves, income from your organisation or other sources of funding you will access to cash flow the delivery phase of your project.

[Text field – 5,000 characters]

Delivery start date.

[Select date]

You will not be able to start the delivery phase of your project until your application has been successful.

Delivery end date.

[Select date]

Are there any fixed deadlines or key milestones that will restrict your project's timetable?

Please tell us about any immovable dates that will affect your project and are beyond your control.

For example:

- dates when partnership funding offers expire or secured funds must be spent by
- anniversaries that your project is designed to celebrate
- external events that are key to your project’s success

[Text field – 5,000 characters]

Our investment principles

Our four investment principles will guide all our grant decision making under our 10-year strategy, Heritage 2033.

Our investment principles are:

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

You must take all four investment principles into account in your project. You may focus more on some investment principles than others.

For example:

- if your project is focused on restoring natural landscapes, you might want to emphasise both saving heritage and protecting the environment in your application
- if your project is focused on recording and sharing oral histories and skills development, you might concentrate more on inclusion, access and participation and organisational sustainability

The strength of focus and emphasis on each principle is for you to decide and demonstrate.

Explain how your project will save heritage.

[Text field – 5,000 characters]

Explain how your project will protect the environment.

[Text field – 5,000 characters]

Explain how your project will increase inclusion, access and participation.

[Text field – 5,000 characters]

Explain how your project will improve your organisational sustainability.

[Text field – 5,000 characters]

After the project ends

How will you maintain the benefits of your project and meet any related costs?

Tell us how you will manage the benefits of your project after the funding ends.

For example:

- what will happen to the things you produce as part of the project, for example if these will be donated to a local archive or kept on display by your organisation
- how you will manage the heritage in the future, for example if you will keep employing staff to help maintain a site you have restored
- how you will deal with any costs related to maintaining the heritage once the project ends, for example utility costs for a newly opened building

[Text field – 5,000 characters]

How will you evaluate the success of your project and share the learning?

You must evaluate your project and provide a written evaluation report once you finish your project.

You will need to create an evaluation plan at the start of your project. This will be an outline of how you are going to collect data to measure, analyse and understand what you are doing and ultimately to provide evidence about what your project has achieved.

Tell us who will carry out your evaluation. This could be staff within your organisation or an individual or organisation who you will need to employ. You should provide a brief for this work as a supporting document.

We would expect to see costs for your evaluation included in your project costs.

[Text field – 5,000 characters]

Project costs and income

Tell us how about the costs and income for your project.

You should include all costs and income relating to your project.

There are different headings for each cost type you can choose from, and for each type of income you might receive to support your project.

The delivery phase costs are split into three categories: capital, activity and other.

Choose the income type which best suits each source of income you will be receiving.

Delivery phase costs:

Capital costs:

Purchase price of heritage items

- Eligible costs include the purchase price itself, valuations, agent's fees and buyer's premium for purchases at auction.
- You cannot include seller's fees.
- If you are a private owner of a physical heritage asset or commercial organisation you cannot include costs here.

Preliminary works

- This includes scaffolding, any preliminaries or pre-construction archaeology.

Repair and conservation work

- This includes costs of work to repair, restore or conserve a heritage item, building or site.

New building work

- This only related to new building work (for example, an extension to a building or work to install an exhibition). If you are a commercial organisation, you cannot include costs here.

Other capital work

- Include any other costs for capital work here.

Digital outputs

- Costs for creating any digital works and meeting our digital requirements.

Equipment and materials (capital)

- This might include historic costumes, hard hats to give site access, art materials or leaflets and publications.

Other costs (capital)

- Please use ‘other’ for any costs that do not fit within the given cost headings. Give a clear description of these costs.

Professional fees (capital)

- This includes any person appointed for a fixed term to help with planning and delivering capital work in your project. This may include a project manager, architects or a quantity surveyor.

Activity costs:

New staff

- Include costs for staff who will be working on your project. Make sure to also include any applicable on-costs.
- This could include new fixed-term contracts, secondments, apprenticeships and the costs of freelance staff to help deliver your project. Do not include the costs of paying trainees here.
- In some circumstances it may be appropriate to include costs for maternity leave and/or redundancy payments. We expect your organisation to keep to good human-resource practice and follow all relevant laws, including paying at least the National Living Wage to all project staff members.

Training for staff

- This includes the cost of all trainers and resources needed to deliver activities to help staff gain new or increased skills.

Paid training placements

- This includes the cost of all placements and resources needed to deliver activities to help staff gain new or increased skills.

Training for volunteers

- This includes the cost of all trainers and resources needed to deliver activities to help volunteers gain new or increased skills.

Travel and expenses for staff

- This may include the cost of travelling to a site or venue. Travel costs by car should be based on 55p a mile.

Travel and expenses for volunteers

- This may include food, travel and any other expenses. Travel costs by car should be based on 55p a mile.
- This also includes the purchase and hire of all vehicles, equipment and materials relating to the activities that your volunteers deliver during your project.

Event costs

- This includes any costs associated with the running of events, including room hire, refreshments and equipment.

Equipment and materials (activity)

- Examples may include historic costumes, hard hats to give site access, art materials or leaflets and publications. Do not include materials relating to training or volunteers here.

Other costs (activity)

- Include any other costs such as food for events, learning activities or premises hire. Please give a clear description.

Professional fees (activity)

- This includes any person appointed for a fixed fee to help with planning and delivering the activities of your project. This may include consultants or artists and storytellers.

Other costs:

Recruitment

- This can include the cost of advertising and any travel expenses for interviews.
- We expect your organisation to keep to good human-resource practice and follow all relevant laws.

Publicity and promotion

- We can fund promotional materials that relate directly to your project.
- If we give you a grant, you must publicise and acknowledge this so that as many people as possible know about the benefits of National Lottery funding for heritage.

Evaluation

- This cost heading is mandatory as all projects must be evaluated.
- Include costs for evaluating your project from the beginning. You may wish to employ an individual or organisation to support you with this.
- We recommend the costs are proportionate to the scale of your project.

Other

- Include any other costs here. Provide a clear description of each cost.

Full cost recovery

- Full cost recovery is a cost type used to cover indirect costs of a project. Indirect costs include overheads, or costs which are not directly related to the project your organisation is delivering, but which are essential for the running of your organisation.
- If you are an organisation in the voluntary sector, we can cover a proportion of your organisation’s overheads, which must be appropriate to the time or resources used for your project. 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
    - rely upon volunteers to carry out their aims
- Include any costs for full cost recovery here.

Community grants

- You can include costs for any payments to third party owners, including private owners, for activities and capital works that contribute to achieving your overall aims for your project.

Contingency

- This cost heading is mandatory. Contingency is used to pay for unexpected costs required to deliver your project.

- We would expect the amount of contingency included to help manage your identified challenges or risks. It should also reflect the scale of your project.
- Make sure that you only include your required contingency here and not within the other cost headings in your application.

Inflation

- Include any appropriate costs which will adequately cover predicted inflation. You should budget appropriately for inflation based on the project timescale, plus other factors such materials used, labour demands and location.

Increased management and maintenance costs (maximum five years)

- This includes any increased costs which may arise as a result of capital works which have taken place during your project.
- Increased management and maintenance costs must be included in both the cost and income section of your application form. This is because we recognise the value of this contribution.

Non-cash contributions

- This is 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.
- Non-cash contributions must be included in both the cost and income section of your application form. This is because we recognise the value of this contribution.

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 volunteer time.
- Volunteer time must be included in both the cost and income section of your application form. This is because we recognise the value of this contribution.

Delivery phase income:

- local authority
- other public sector
- central government
- private donation – individual
- private donation – trusts/charities/foundations
- private donations – corporate
- commercial/business
- own reserves

- other fundraising
- loan/finance
- increased management and maintenance costs (maximum five years)
- non-cash contributions
- volunteer time

Supporting documents required for during the delivery phase

Before we assess your application, we need to see your supporting documents.

Some supporting documents are mandatory – these are documents which every project must provide for their delivery phase application. Other supporting documents are only mandatory if they apply to your project: for example, if you are commissioning any work, we will need to see briefs for that work.

Choose a clear, descriptive file name for each supporting document so we can easily identify each one.

Supported file types: .jpg, .doc, .docx, .pdf, .xls, .xlsx, .ppt, .pptx, .zip, .kml, .csv, .bmp, .tiff, .rtf, .png, .txt, .msg, .mp4, .eml, .ods, .odt, .webp

[Upload files]

List of supporting documents for the delivery phase

Activity plan or area action plan

You must provide an activity plan or area action plan as applicable. If you are working on an area-based project, you must produce an area action plan. If your project relates to activities and people, you must produce an activity plan.

Timetable plan or area action plan

This is a summary timetable for the delivery phase of your project.

Cash flow

This should be detailed for the first year and an outline for consecutive years.

Income and spending forecasts

This should include a forecast income and expenditure account, a cashflow forecast showing the expected monthly cashflow and statements of assumptions underlying the forecasts.

These should cover five years following project completion.

Project management structure

Outline your project management structure so we know who will make decisions and how you will control change during your project.

Detailed cost breakdown

Mandatory spreadsheet detailing the cost breakdown in the Project costs section of the application, including additional columns comparing costs at the award of your development grant, your development phase review and the submission of your delivery phase application.

Risks for the delivery phase

Outline the risks to the delivery phase of your project and how they will be managed.

Main risks document for after the project is completed

Outline the main risks facing the project after it has been completed and how they will be managed.

Calculations of full cost recovery

If you have included full cost recovery as a cost heading in your project costs, you must provide a document that shows how you have calculated this. 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.

Briefs for commissioned work

Briefs describe any work you plan to commission during the delivery phase of your project. If you are commissioning work, for example, from an artist or an architect, then you should upload a brief. The brief should describe the works, how long they will take, and how much they will cost. Template brief for commissioned work. For fees over £10,000 you should get three competitive tenders or quotes. For fees over £50,000 we will expect you to provide proof of the competitive tendering process.

Job descriptions

If you plan to recruit new staff or apprentices to help you deliver your project, you need to provide a job description for each new post. Each job description should include the proposed salary and working hours.

Business plan

We would like to see a refreshed business plan for your organisation which incorporates the project you are applying to undertake. If you are an organisation which manages multiple sites or are, for example, a local authority, please revise the documents most relevant to the heritage you are seeking funding for to include the project activity.

Images

Provide up to six images that help illustrate your project. For example, an image of a map of the area showing the locations involved in your project, if it is taking place across more than one place or across a large area. Please make sure you have all the permissions required to share these with us, as we may use these to tell people about your project, including our decision makers.

Management and maintenance plan (if applicable)

If your project involves capital works, the creation of new material, or the purchase of a historic building, structure, transport heritage or land, we will ask you to prepare a management and maintenance plan as part of your delivery phase application.

The management and maintenance plan tells us how you will look after your heritage once the project is complete, including how you expect to maintain the benefits of your project in the future. We will expect you to make sure that the work we have funded is kept in good condition.

Design specification (if applicable)

It may be relevant to include a design specification that explains the way your project intends to display or share heritage.

Interpretation plan (if applicable)

Interpretation is the way we communicate stories and ideas about heritage to different audiences. It involves turning information into something accessible, relevant and engaging.

Include specific reference to the ways your project will deepen people's understanding of heritage, explore and make sense of historic sites and landscapes, objects, traditions or events.

Fully developed conservation plan (if applicable)

If your project involves capital works, the creation of new material, or the purchase of a historic building, structure, transport heritage or land, you should submit a conservation plan that details the understanding of your heritage and the opportunities to share your heritage with others that you identified in your development phase. You may address any risks and threats that you have identified.

Partnership agreements

If you plan to work with a partner to carry out your project, you will need to provide a partnership agreement. This document should outline both partner's roles and responsibilities and should be signed by all parties. This document should reflect the needs of your project and you may need to seek independent advice on how to best write an agreement. A partner is another organisation or third-party body that is integral to the delivery of your project, for example the owner of an item, building, land or collection that is involved in your project. 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.

Ownership documents

If you are planning any capital works, or intending to purchase land, buildings or collections, please provide copies of any relevant ownership documents. For example, Land Registry ownership documents or a lease or heads of terms.

Heritage Enterprise supporting documents

- a development appraisal
- an activity statement

Declaration

Confirm declaration

We run qualitative user research to help us to develop our products and services. This could be from a 20minute survey to a two-hour interview.

Tick this box if you would like to be involved in our research, or find out more. [Tick box]

I have read and agreed with the declaration. [Tick box]

a) Data Protection

We are committed to being as open and transparent as possible. This includes being clear about how we assess and make decisions on our grants and how we will use your application form and other documents you give us. We follow all data protection laws and regulations that are applicable and in force from time to time (the 'Data Protection legislation'). As defined by the Data Protection legislation the Trustees of the National Heritage Memorial Fund (who administer the National Lottery Heritage Fund) is a data controller. Our Privacy Policy contains additional information including contact information for our Data Protection Officer. It can be found on the National Lottery Heritage Fund website.

As part of the application process we will collect your name, contact information and position at the organisation you represent as well as any additional personal information you supply about others involved in your project. We may share this information with one of the consultants on our Register of Support Services if they are appointed to help support you on your project. We do not transfer your data to any third parties based outside of the EU.

We may use your application form and other documents you give us, and the data contained within:

- To decide whether to give you a grant.
- To provide copies to other individuals or organisations who are helping us to assess, monitor and evaluate grants.
- To share information with organisations and individuals working with us with a legitimate interest in National Lottery applications and grants or specific funding programmes.
- To hold in a database and use for statistical purposes.
- If we offer you a grant, we will publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and in the publications or websites of relevant Government departments and any partner organisations who have funded the activity with us.
- If we offer you a grant, you will support our work to demonstrate the value of heritage by contributing (when asked) to publicity activities during the period we provide funding for and participating in activities to share learning, for which we may put other grantees in contact with you. This may include sharing your information and any subsequent publicity with third party partner distributors.

b) Freedom of Information

As a public organisation we are subject to the Freedom of Information Act 2000 and Environmental Information Regulations 2004 which give the public a right of access to the information that we hold, unless any exemptions apply. This includes any recorded information provided to us by our applicants and grantees.

When you complete the Declaration at the end of the application form, you are confirming that you have no objection to us releasing the application form and any other information you provide to us to anyone who asks to see them once your application has completed the assessment process. If there is any information that you don't want made publicly available, please explain your reasons below:

[Text box]

If we receive a request for information we will always consult you first and will take your comments into account and will apply the exemptions in the Freedom of Information Act 2000 and Environmental Information Regulations 2004. However, the decision to release or withhold your information is our decision and we will not be responsible for any loss or damage you suffer as a result of our meeting these responsibilities.

We may contact you from time to time to keep you informed about the work of The National Lottery Heritage Fund.

[Tick box if you would like to be kept informed of our work]

- I confirm that the organisation named on this application has given me the authority to complete this application on its behalf.
- I confirm that the activity in the application falls within the purposes and legal powers of the organisation.
- I confirm that the organisation has the power, if awarded a grant, to accept and pay back the grant.
- I confirm that, as far as I know, the information in this application is true and correct.
- I consent to my personal data being used as described and understand that should the requirement change from that described I will be informed at the earliest convenience.

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.