

# Receiving your grant: £10,000 to £250,000

30/01/2024

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This guidance sets out how you will receive your grant. It also explains what we expect of you before, during and after receiving it.

## Introduction

After you have been awarded a grant, it is important to understand the next steps you must take. The funding you will receive is public money from National Lottery players, and it is important that it is managed in an accountable way.

By reading and understanding the requirements outlined in this guidance, your completed application, the application guidance and the terms and conditions (including our definitions), you can make sure that your project will be compliant with our requirements.

If, after reading these documents, you have outstanding questions or concerns, please get in touch for further support. Your first point of contact with The National Lottery Heritage Fund is your Investment Manager.

Additional guidance is also available in the [Funding](#) and [Good practice guidance](#) sections of the website.

## Project timeline

1. give us more information about your project **before** you can agree to your grant
2. agree to your terms of grant within **six months** of the date you received the email inviting you to do so
3. deliver your project activity
4. submit completion report within **three months** of completing your project
5. comply with agreed terms for the duration of your grant contract

## Give us more project information

Once we have told you that you have been awarded a grant, you will be able to sign into your account and give us more information about your project. This will include questions about:

- jobs and training opportunities which will be supported through your project
- any volunteers or visitors your project might have
- your project's environmental impact
- how you will acknowledge and promote your grant

These questions are not part of your application – your answers will not affect your grant award. We ask these questions to help gather data on the impact of our funding. We collect evidence from across our portfolio to help inform our practice and how we deliver our strategy.

To help you to answer these additional questions about your project, read the [Give us more project information guidance and questions](#).

You will need to complete this task before you can agree to the terms of your grant and start your project.

## **Agreeing to the terms and conditions**

Once you have given us more information about your project, you will receive an email inviting you to sign into your online account to check and agree your project details, and to agree to and sign the terms and conditions of your grant.

To agree to the grant, you will need to:

- check the details we have about your project are correct
- send us any new evidence for your project, for example cash contributions, permissions or licenses
- tell us if there are any significant changes to your project since you submitted your application, for example changes to project partnerships or cash contributions
- Tell us details of two legal signatories for your organisation, so we can send them a link to download, read, sign and upload the terms and conditions. If you are a legal signatory for your organisation, you will be taken directly to the terms and conditions process at this stage without the need for an email.
- download, read and sign the terms and conditions

You will also need to send us, if applicable:

- Proof of property ownership including, for example, up-to-date copies of the Land Registry title register (with plan), leases and evidence of any existing mortgages. If the name on these ownership documents does not exactly match your organisation name, let us know before you agree to the terms and conditions so we can update it.
- an updated project plan and risk register if there are substantial changes to your project since you applied for your grant
- a project cashflow forecast, showing when you expect to receive any cash contributions and grant payments
- a project management structure and methods for choosing consultants, contractors and suppliers

Before we can process your terms and conditions, you will need to, if applicable:

- have secured all cash contributions, statutory permissions and any necessary licences
- met our ownership requirements

You must submit this information within six months of receiving the email.

While we have a standard contract for most projects, we may vary our processes and terms depending on the specific circumstances of your project. If applicable, you will be told about any additional terms at this stage.

Once we have processed the information you have provided, we will confirm this to you in an email. 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 start any work before receiving this permission, it is at your own risk.

## **How we will pay your grant**

After you have agreed to the terms of grant, you will be asked to sign into your online account to provide your bank details.

Once you have provided your bank details and they have been verified by us, the first payment is processed and 50% of the grant is paid into the bank account for which you provided details.

After you have spent the first 50% of your project costs, you will be able to submit an online payment request for the next 30% of your grant. You must provide evidence to demonstrate how the first 50% of your project costs were spent.

We will pay the remaining 20% of your grant in arrears once you have spent all of your project costs. You must submit a final payment request and evidence to demonstrate how the previous payment of 30% of your grant and this final 20% were spent. You must also provide the completion report, evaluation and evidence of [acknowledging the grant](#) as agreed in your contract.

Once you have made your final payment request, we will not accept any further requests for payments from you. You should therefore agree your final accounts with your contractors and suppliers before you apply for the final grant payment.

If your project involves the acquisition of heritage, we will pay the full grant amount needed for the purchase in a single payment.

We aim to release all grant payments within 10 working days of receiving a payment request and the required supporting documents.

If you spend less than your agreed costs and your project completes under budget, you will need to return to us any funds from your National Lottery grant that have been paid to you and have not been spent. We will agree with you the amount to be returned as part of completing your project.

## **Completing your project**

You must submit a completion report within three months of completing your project. We may also request additional updates on your progress during the lifetime of your project. We will let you know the frequency that best supports you and reflects the risk of the project.

You will be given a grant expiry date based on the project timescale that you identified in your application. You must complete your project and send us your completion report by the grant expiry date.

If you experience delays in delivering your project, you can request an extension to the grant expiry date. We cannot guarantee an extension, and if your project takes more than a maximum of five years to complete from the date you agreed to the terms of grant, we may close your grant and ask for the repayment of all or part of the funds you received.

The length of time which your grant contract terms apply **depends on the core activities** carried out in your project.

For **activity** based projects, for example an exhibition or an event with no digital outputs or capital works, the terms and conditions end on the project completion date.

For projects creating **digital** outputs, for example the creation of a website, the terms and conditions apply until five years after the project completion date. If the lead applicant is a private owner of heritage, the terms will apply for five years from the project completion date.

For **capital** based projects, for example new building or restoration works, the terms apply until five years after the project completion date. If you are a private individual or for-profit commercial organisation the terms and conditions will apply for 10 years after the project completion date.

If your project involves **buying** a heritage item, land or building, the terms and conditions will apply indefinitely. If you want to sell, destroy or dispose of what you have bought in future, you must ask for our permission and we may claim back all, or part of, your grant or require share of proceeds in proportion to the value of the grant. You can find more information about acquiring buildings, land or heritage items in the application guidance.

When we have received all the necessary documentation to record your project as complete, we will confirm this with you. This will be known as the project completion date.

By complete we mean:

- your project is finished, and you have achieved your approved purposes
- you have appropriately [acknowledged your grant](#)
- you have evaluated your project and submitted a completion report
- you can supply high resolution digital photographs documenting your project
- if your project involved capital works, you have provided a practical completion certificate
- if applicable, you have listed the project's digital outputs and provided the web address (URL) of the website or websites where they can be accessed
- if applicable, you have filed your conservation plan with the relevant public library, archive and/or database, and shared the details of this with your Investment Manager

We will continue to keep in contact with you at intervals after the project is completed, including through our customer surveys.

## Working with us

We encourage you to keep in touch with us, so we can hear about the things you are achieving throughout your project.

While it is not always possible for us to visit or meet the organisations we fund, please invite us to key project events and openings and we will aim to send a representative where possible.

We understand that problems or significant issues can arise during a project. This could include any issues within your organisation, changes to project costs, serious delays, failure to achieve your approved purposes or deliver against our investment principles. You must get in touch with us as soon as possible, so that we can respond and support you as appropriate.

We expect you to respond promptly to any requests for information and to discuss any substantial changes to your project with us. We will keep you updated about any changes to National Lottery grant policy or practice that may impact your funding.

You cannot change the approved purposes of your project without our prior written agreement. If you would like us to consider any changes to your approved purposes you must send us written details of the reasons for the request and explain how it will affect:

- the quality of your project
- the cost of your project
- the time you need to complete your project
- the future viability of your project

We may then re-assess the project or take any other action we consider necessary. It may be determined that we give permission for the change only if you agree to additional terms and conditions as required.

Any changes that are agreed with us must be in writing and should also be reported in your project updates and/or completion report as applicable.

If you need to make minor budgetary changes and move funds between the cost headings you provided in your application in order to achieve your approved purposes, you can report on this in your project update. You must demonstrate how these changes helped you to deliver your project.

You must get in touch with us in advance if you want to propose any substantial changes to these cost headings and for any major spending of your contingency budget.

If the total project cost increases during the project, we will only consider increasing your grant in exceptional circumstances. In this case you will have to provide further information which will be reviewed on a case-by-case basis.

## **Project updates**

When agreeing to the terms and conditions of your grant, we will let you know how many project updates we expect you to provide during the delivery of your project.

Using these updates, we will monitor the progress of your project to confirm that it is delivering the project as detailed in your application and the approved purposes set out in your grant contract.

Your project updates should include:

- photographs showing the progress of your project (mandatory)
- a record of activities or events that you have arranged (mandatory)
- job descriptions/details of recruitment (mandatory if applicable)
- procurement reports (mandatory if applicable)
- progress in reaching key milestones, for example appointment of contractors or staff
- issues arising so that we can respond and support you as appropriate

You will need to sign into your online account and select the project you would like to provide an update for. You will then need to answer a series of questions to provide an update on how your project is progressing.

Once you have provided this information and uploaded any supporting evidence, you will be able to submit your project update.

You will also be able to submit a payment request if needed.

## **Providing evidence of expenditure**

You must provide invoices for all expenditure over £500. All invoices submitted to us should be for eligible works towards the project we have agreed to fund. They should also be clear, readable and not damaged or tampered with.

The invoice should be addressed to the organisation submitting the payment request.

Invoices must have:

- an invoice number
- the date they were raised
- the date payment is expected and the payment terms
- how payment is made and to who
- company details, including name, address, email address, telephone number, company number, VAT registration number (if VAT registered)
- a description of the services provided
- the gross (without VAT), VAT amount if VAT registered and the net (total) amount due

You may provide a separate table detailing costs under £500, including this total as one line of expenditure in your payment request.

Salary costs should be evidenced by providing payslips or a letter signed by a member of your organisation with financial authority.

If your project involves an acquisition of heritage, you will need to provide us with an invoice for the full purchase price.

All grant funds spent on the project should be reported against the cost headings in your application.

We cannot cover the costs of VAT that you can reclaim. It is your responsibility to seek appropriate advice about reclaiming VAT.

If your VAT status changes during your project we will reduce our contribution to the costs where you have managed to claim back the VAT.

## **Community grants**

As part of your project, you may have asked us to contribute towards a pot of money that you can use to fund other groups or organisations, who we call community grant recipients, to complete pieces of work that will contribute to the overall aims of your project. This is called a community grant.

Before you launch your community grant scheme, you will need to send us details about your application, decision making and progress monitoring processes. This should be sent to your Investment Manager who will review and approve it.

When making a payment request to us, you must include a list of community grant recipients as evidence of expenditure. The list must include how much each grantee was awarded, the date of the decision to award the grant and must be signed by two people from your community grant decision panel.

You are responsible for monitoring the progress of community grants and ensuring compliance with the terms you have agreed to during your project application. You will need to decide how you will keep in touch with each community grant recipient and what information you want to see from them. This can be proportionate depending on the size of the grant and what it was awarded for.

You should tell us how the community grant scheme is progressing in your project updates to us and evaluate the overall effectiveness of community grants within your project in your completion report.

## **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.

### **20th May 2024**

Added a new point about supplying a document which shows your 'project management structure and methods for choosing consultants, contractors and suppliers', if applicable.