



# Application Guidance

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

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# Introduction

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

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

This guidance is for applications for grants from £3,000 to £10,000.

This guidance will tell you more about the programme and the types of project we can fund. You will also find the following resources useful when making your application. You can find these documents on our website:

- **Application form and help notes:**  
This document includes the application questions so you can see what we will ask you before you begin your application. It includes some help notes to help you answer the questions (these are also included in the application form when you click this icon: )
- **Receiving a grant:**  
This document tells you what you need to do if you are successful and has more detail about our requirements.
- **Standard terms of grant:**  
This document outlines the terms of our grants.
- **Good practice guidance:**  
A link to documents on a range of topics to help you achieve a high quality project.



This icon is shown next to links to further information available online

# About the programme

## Programme name

National Lottery Grants for Heritage

## Grants from

£3,000 to £10,000

## Applications from

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

## Requirements

Your project must not start before we make a decision and it must focus on heritage in the UK

## Project length

Up to one year

## Deadlines

There are no deadlines so you can apply whenever you are ready

## Assessment process

We will assess your application and give you a decision in eight weeks

**Your project must not start before a decision is made and it must focus on heritage in the UK**

# Application checklist

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



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

## If applicable

- I can meet the ownership requirements for the grant funded property
- I have any permissions or licences I need (for example, listed building consent or bat licence)

# Who can apply?

## Under this programme, we accept applications from:

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

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

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

We will ask to see your constitution or governing document (see Supporting documents on p.6). You must have at least two people on your board or management committee who are not related by blood or marriage or living at the same address.

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

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

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

# What can we fund?

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

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

## As a guide, this could include:

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

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

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

## We will only fund projects that:

- have a clear plan with a defined start, middle and end
- have not already started
- and will last up to one year

**We can cover a wide range of direct project costs. As an example, your project could include:**

- volunteer expenses
- training costs
- event costs (including room hire, refreshments and equipment)
- small capital works
- new staff posts
- professional fees (for example, legal costs)
- costs to improve access to your heritage
- activities to help you strengthen your organisation
- costs associated with taking on new responsibility for heritage (for example, feasibility studies)

**We cannot cover the following:**

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

**If your project will benefit people in Wales, you must use the Welsh language when you carry out your project. You can find guidance on using the Welsh language in your project on our [website](#). **

**Private owners of heritage****If you are a private owner of heritage, we will not fund:**

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

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

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

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

# Before you apply

## All of the projects that we support need to:

- achieve one or more of the outcomes on this page, including the mandatory one
- be environmentally friendly
- promote the role of the National Lottery in making the project possible
- carry out evaluation

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

## Guidance

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

### The following are essential reading for all projects:

- [Information on acknowledging your grant](#) 
- [Evaluation guidance](#) 

**Outcomes are changes, impacts or benefits that happen as a direct result of your project.**

## Outcomes

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

All of the projects we fund will achieve one or more of these outcomes. The number of outcomes you achieve will depend on what you want to deliver and should be proportionate to the size of grant you are requesting or the specific focus of your project.

We expect projects to achieve some outcomes more strongly than others. Please focus on the outcomes that are strongest for your project, as we will monitor your progress against these and you will use them to evaluate the change your project has made. All projects must achieve the **'wider range of people will be involved in heritage'** outcome as a minimum.

- **A wider range of people will be involved in heritage (mandatory outcome)**
- Heritage will be in better condition
- Heritage will be identified and better explained
- People will have developed skills
- People will have learnt about heritage, leading to change in ideas and actions
- People will have greater wellbeing
- The funded organisation will be more resilient
- The local area will be a better place to live, work or visit
- The local economy will be boosted

**You can find more information about our outcomes and how you can measure your progress against them in the [Application form and help notes](#)  for this programme.**

## Promotion of your National Lottery grant

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

You can find ideas on acknowledgement and promotion, and the branding we expect you to use, on our [website](#). 

## Evaluation

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

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

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

**Your evaluation report (10 pages max) should include the elements outlined in the table opposite:**

Report section	To include:
<b>Executive summary</b>	An overall summary of the project activities and outcomes. It should be possible to read this and get a good grasp of what happened in your project and what impact the overall project has had.
<b>What was planned to happen</b>	This should highlight a brief background to the project, setting out why the project was started in the first place, what you planned to do and what difference the project intended to make and why.
<b>What actually happened</b> (This should be the longest section of the report)	This section should detail what took place as part of the project under a coherent set of project activity headings. The difference your project made or is making should follow on from the areas of outcome and impact highlighted in the 'What was planned to happen' section. This section should also reflect on areas such as project management, staffing, timetable, and approach to ongoing evaluation.
<b>Summary of lessons learnt</b>	What are the key things that the organisation has learnt? On reflection, what would you do differently next time?

# Your contribution

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

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

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

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

## Cash contributions

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

## Non-cash contributions

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

## Volunteer 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 to calculate the value of your volunteer time:

Professional volunteer (for example, accountancy or teaching)	£50 per hour
Skilled volunteer (for example, leading a guided walk)	£20 per hour
Volunteer (for example, clearing a site or acting as a steward at an event)	£10 per hour

# Developing your idea

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

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

## People

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

## Specialist support

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

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

## Community

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

## Resourcing

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

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

## Budgeting

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

**Your budget should be realistic and based on research, quotes or previous experience.**

## Evaluation

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

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

## Further resources

You can read more about other projects on our [website](#) 

You can talk about your idea with other applicants, grantees and staff on the [Online Community](#) 

We also provide a range of useful templates on our [website](#)

# How we assess your application

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

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

We will assess your application and give you a decision in eight weeks.

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

You should answer all of the questions in the application form and make sure you describe your project in question 1b.

This is the only section of the application form that is directly presented to our decision makers. It is your opportunity to explain your project in your own words.

**We will assess your application and give you a decision in eight weeks.**

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

- whether your project is relevant to heritage in the UK
- the needs and opportunities your project will address
- how strongly your project will achieve our outcomes
- overall value for money
- potential risks to the project's success
- your approach to environmental sustainability

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

## Application process



**Read the application guidance and plan your project**



**When you are ready, send us your online application**



**We will assess your application in 8 weeks**



**Your application will go to a monthly decision meeting**



**We will contact you to let you know the decision**

# Supporting documents

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

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

## 1. Governing document (for example, constitution)

**We do not need to see your governing document if:**

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

**Your governing document should include the following:**

- the name and aims of your organisation
- a statement that prevents your organisation from distributing income or property to its members during its lifetime

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

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

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

The Charity Commission provides [guidance](#)  on creating a governing document.

## 2. Accounts

Include your most recent audited or accountant verified accounts.

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

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

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

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

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

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

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

**Please do not submit any extra documents, as we will not use them in assessment.**

#### 4. Condition survey (if applicable)

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

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

**If your project involves the conservation of heritage, you must provide a condition survey or another appropriate document such as a draft or outline conservation plan.**

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

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

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

# What happens after you apply?

## If your application is successful:

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

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

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

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

## Reporting

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

## Terms of grant

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

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

- **Activity:** the date the project finishes (known as the Project Completion Date)

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

**When you finish your project, we will ask you to submit a completion report and your project evaluation.**

## If your application is unsuccessful:

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

## Legal and policy requirements

### Ownership requirements

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

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

## Digital outputs

We have specific requirements, which are set out in our Standard terms of grant, for 'digital outputs' produced as part of any project.

We are using the term 'digital output' to cover anything you create in your project in a digital format that is designed to give access to heritage or to help people engage with and learn about heritage.

For example, this could be digital images, sound files or data, a website with heritage material, an app, virtual reality, or a film made using digital technology.

The requirements do not apply to digital outputs that have no heritage content or do not engage people with heritage, for example, a website that contains only information about your organisation/ project or events listings.

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

- 'usable' (the output functions as intended and is kept up-to-date) and 'available' (the output is available to the public as intended; all the digital files are held securely; you can give access to the digital files on demand) for five years from project completion
- free of charge for non-commercial uses for five years from the the Project Completion Date
- licensed for use by others under the Creative Commons licence 'Attribution Non-commercial' (CC BY-NC) for five years from the Project Completion Date, unless we have agreed otherwise

#### We expect:

- websites to meet at least W3C Single A accessibility standard
- you to use [open source technologies](#) [where possible](#)
- you to contribute digital outputs to appropriate heritage collections

Guidance for digital projects can be found on our [website](#) [↗](#)

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

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

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

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

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

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

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

# Additional information

The evaluation budgeting and reporting section below is relevant for all projects. You should also read the following sections if they are relevant for your project:

[Buying land and buildings](#)

[Buying heritage items and collections](#)

[Projects involving land, habitats and species](#)

[Third party ownership requirements including for community grants](#)

## Evaluation budgeting and reporting

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

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

**We aim to fund projects that create positive and lasting change for people and communities.**

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

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

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

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

### 1. Activities

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

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

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

## 2. Visits

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

## 3. Volunteers

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

## 4. Training

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

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

## 5. New staff

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

For more information on evaluation, read the guidance on our [website](#). 

## Buying land and buildings

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

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

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

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

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

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

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

### The information we need about the purchase:

- a location plan to scale, clearly identifying the extent of the land or building to be purchased and any relevant access to the land and building
- one independent valuation. This should include a detailed explanation of how the assessment of the market value was reached. We welcome valuations by the District Valuer. We may also arrange for our own valuation. We will normally be prepared to support a purchase at a figure up to 10% above the top of any range in an accepted valuation
- evidence that the current owners are the owners (have legal title) and have the right to both sell the land and/or building and transfer the title to the new owner; and evidence of any legal covenants, or rights (such as fishing, shooting, mineral, drainage), or long- or short-term tenancies, or rights of way or access, or any other interests which are attached to the land or building

### Buying heritage items and collections

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

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

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

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

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

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

**If your project includes buying a heritage item, land or building, the terms of the grant will last indefinitely.**

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

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

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

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

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

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

## Costs

### The eligible costs associated with a purchase include:

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

### Ineligible costs include:

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

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

### The information we need about the purchase

#### You will need to provide:

- information about the history and significance of the item(s)
- a statement about why you are the right organisation to own the item(s). This should be supported by what you say in your policies, such as your acquisition or collections-management policy
- evidence that you will become the full owner of the item(s) or a good case for well-planned joint ownership
- documentary proof of the provenance (origin) of the item(s). Examples of proof include sale documents, legal documents, export documents, written statement by the current owner, history of the item(s)

- evidence that the current owners are the owners (have legal title) and have the right to both sell the item(s) and transfer the title to the new owner
- an independent valuation on an open-market basis for the item(s) you wish to buy; this should include the valuer's reasoning to support the valuation, not just a statement of the value; you do not need to commission a valuation for an item (or items) which is the subject of an export stop or part of the Treasure Valuation Process
- evidence that you have followed current guidance on portable antiquities, illegal trade, and items and collections that could be sensitive. You should provide a statement outlining your research into the relevant laws and guidelines on ethical acquisitions
- a description of how you will manage the item(s) and keep it secure, both at the time you buy it and in the future
- a conservator's report saying whether the item(s) have conservation needs and, if so, how you will meet those needs. The report should include evidence that your organisation has the right environmental conditions to house the purchase

## Projects involving land, habitats and species

### Biological-recording projects

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

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

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

### The information we need about agricultural state aid

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

### Working on private land

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

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

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

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

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

Even when working on private land we will expect some degree of public access to be provided. We also accept the principle of zoned levels of physical access within your project area and that physical access may not always be appropriate or desirable for habitat conservation reasons.

There should already be public access to the land that you own, and you may also have some infrastructure, for example paths or hides, that can help to accommodate increased public access.

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

### Third party ownership requirements

#### 1. For landscape and nature projects

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

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

#### Details of the parties:

1. Confirmation as to how the land is held (freehold or leasehold)
2. A description of the property (including plans)
3. Covenants on the part of the land owner to maintain the land and provide public access in accordance with the terms of the grant (as applicable)
4. A provision that any onward disposal should be subject to the third party agreement
5. That the agreement will last from the start of the work on the third party land until 10 years following Project Completion.

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

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## 2. For capital works to built heritage: (for example, historic buildings, ornamental gardens)

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

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### Legal costs

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

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### What next?

Use our handy checklist at the beginning of this guidance to make sure you are ready to apply. You can then [apply online](#) .

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## Contact us

You can find more information about contacting us on our [website](#). 

If you want to find out about our complaints process, please visit our [website](#). 

