

Towards the Heritage Lottery Fund's new strategy 2013–2019



Below is a summary of what we have learned from our recent public consultation **Shaping the future – for heritage, for everyone!** carried out between 31 January and 28 April 2011. This will inform the development of our strategy for the period 2013-2019.

Our approach to the consultation

We ran two consultation questionnaires – one covering in detail our strategic framework, changes to programmes and new opportunities and challenges; and a second asking a small number of more general questions about our approach to funding of heritage, UK wide and locally, designed to engage directly with the Lottery playing public. Over one thousand people (1117) responded to the latter consumer consultation and strongly endorsed our approach – with 87% agreeing we should continue to support the full breadth of the UK's heritage, and 69% agreeing we should continue to fund the full range of projects we do now, from small community heritage initiatives to major transformational capital projects.

We received a further 1068 responses to the more detailed consultation, representing individuals, organisations and networks of organisations with a professional or voluntary interest in heritage across the UK. The summary below refers to responses to this questionnaire.

Our strategic framework

There was clear support for our proposal that we adopt a single strategic aim, described in the consultation as 'making a positive and lasting difference for heritage and people'. We regard this as a further step in delivering integrated benefits for both heritage and people that we have always championed. Two-thirds of respondents welcomed this development - some saying it was 'less confusing', 'clearer', 'more straightforward' and 'more flexible'. However, we noted that customers would need further guidance to interpret our expectations and requirements in preparing applications and understanding how we reach decisions. There was also concern that by not using the words 'conservation', 'participation' and 'learning' we might lead people to think we were placing less emphasis on any of these areas, which is certainly not our intention. We will work through these issues more fully as we develop our strategy.

Balance and direction of funding

Our approach to working at a local level, within a UK-wide organisation, providing help and support through the grant administration process, was strongly endorsed by nine out of ten respondents. Overall, there is no strong appetite for major changes in the current balance of our funding between targeted and open programmes, nor for giving any greater priority to protecting past investment over supporting new projects. However, you did want us to give clear priority to heritage identified as being at risk, and we will consider how this can be taken into account more explicitly in our application and assessment process.

Some of you – notably in the natural heritage sector – felt that your heritage had done less well than others in receiving a fair share of funding. Linked to this, there was support for including 'types of heritage that have benefited least from HLF funding in the past' in our framework of priorities for receiving development help in making applications to us.

Almost two-thirds of you supported the suggestion that we extend our role in building the financial sustainability of voluntary heritage organisations, and the consultation also endorsed HLF playing a stronger role in encouraging a culture of giving, of time and money, from private supporters of heritage. We can already fund costs associated with fundraising and business planning through development grants for larger projects, and recently made a further response to this interest through our £20m investment in the Catalyst programme, announced in early July. This programme, which will open later this year, will provide match-funding for heritage organisations wanting to build endowments, and will include further measures to develop fundraising capacity in the sector.

Changes to our current grant programmes

The consultation produced the strongest endorsement of all for a simpler grants programme for small grants under £10,000, with 96% of you in favour. A very high proportion of respondents (86%) also welcomed the proposal for a medium-sized grant programme, with a single-round application process, and a higher maximum grant than is currently available under the Your Heritage programme.

Our Heritage Grants programme, with grants for all types of heritage from £50,000 upwards is clearly widely valued. We reduced our requirements for partnership funding for Heritage Grants and parks projects last autumn, in response to the challenging economic conditions applicants are currently facing. This is something we will keep under review. Two-thirds of you would like us to maintain this reduction beyond 2013, while others stressed the need for flexibility to agree partnership funding levels on a case by case basis.

All of our priorities for targeted programmes were welcomed, with the strongest support for our Young Roots and Landscape Partnerships programmes. We appreciate the detailed and thoughtful feedback you gave on our specific proposals for changes to these programmes. Two-thirds of you endorsed the proposal that heritage-led regeneration should continue to be a focus for HLF. Although there were no strong differences of opinion between the countries across the UK on almost all issues in the consultation, in Wales and Scotland there was particularly strong support for the approach to investing in place-based heritage we have delivered through the Townscape Heritage Initiative.

Two-thirds of you who have had grants from us in the past felt the work you did to achieve an award from us was in proportion to the amount of money you asked for, and many of you acknowledged the steps we have taken to improve our application processes since 2008. However, around a quarter of you believe making an application to us is still too onerous. Given the difficult funding environment facing the sector over the next few years, it will be a very high priority for us to address your concerns on this as we review our processes and develop new programmes.

Additional opportunities and challenges

Our proposals to introduce new measures to help the sector meet the challenges of climate change and take advantage of the opportunities offered by digital media both attracted a good level of support, although we noted some caution that the introduction of new requirements in either area might complicate the application process. In detailed feedback, many of you commented on the strong potential of digital media to extend the reach of heritage projects and engage new audiences. Our proposal to run further targeted initiatives on skills was met with greatest enthusiasm, with over half of you expressing very strong support, and eight out of ten overall wanting to see this. Many of you also commented positively on HLF's role in facilitating the sharing of knowledge and skills across the sector.

Your responses to our question on heritage in private ownership were more mixed, although there was strong agreement with the principle of HLF doing 'a little more' provided that there were clear public benefits. On acquisitions of portable heritage, over half of you favoured a change of policy in our approach to urgent acquisitions, and there was support from museums, libraries and archives for the principle of HLF funding strategic collecting.

Next steps

We will be doing more work to develop our proposals in the areas where the consultation gives us a clear mandate to move forward, and our Board of Trustees will discuss these in the autumn. We will keep you informed over the winter of any developments that could have an impact on the planning of new applications to us from late 2012-2013 onwards, and will publish our new strategy in full, with details of our funding portfolio for 2013-2019, in spring next year.

Dame Jenny Abramsky
Chair

Carole Souter
Chief Executive