

**NATIONAL  
HERITAGE  
MEMORIAL  
FUND**



## **Business Plan for 2018-19**

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## Contents

Foreword: Our purpose and role.....	4
1. Introduction, our aims and our values.....	5
1.1 Background .....	5
1.2 Aims .....	6
1.3 Our impact as HLF .....	6
1.4 Our values .....	7
1.5 How we are organised .....	7
2 Our Corporate Strategy .....	9
2.1 Overview.....	9
2.2 Current position and drivers for change .....	9
2.3 Market opportunities for HLF.....	9
2.4 Our vision and role.....	9
3 Our response to the Tailored Review .....	11
4 Transforming how we work.....	12
5 Our strategy for National Lottery grant giving .....	13
5.1 Strategic Framework 4 2013-2019.....	13
5.2 Our project outcomes.....	13
6 Strategic Framework 4 – our progress to date.....	15
6.1 Grant programmes and initiatives .....	15
6.2 Balance and spread of funding .....	15
6.3 Leadership and sharing learning.....	15
6.4 Preparing for our new strategic funding framework from 2019 .....	16
7 Our focus in 2018-19.....	18
7.1 Challenges.....	18
7.2 Corporate priorities .....	19
8 Our people .....	23
8.1 Our staffing details.....	23
8.2 Our commitment to diversity and equality .....	23
9 Our grant programmes .....	25
9.1 Overview.....	25
9.2 Our programme budgets for 2018-19.....	25
9.3 Our open and targeted programmes .....	26
10 Our operating costs .....	28
11 Our Service Standards .....	29
11.1 National Heritage Memorial Fund Decisions .....	29

11.2 Heritage Lottery Fund Decisions .....	29
11.3 Grant Payments.....	30
11.4 Customer Satisfaction.....	30
12 Our risks and how we manage these.....	31
13 Our commitment to transparency and data publication .....	32
14 How to contact us.....	33
Appendix on our grant programmes: Applications and Awards.....	34

## **Foreword: Our purpose and role**

The National Heritage Memorial Fund (NHMF) - also operating as the Heritage Lottery Fund (HLF) - holds a unique position across the United Kingdom.

The NHMF is able to provide financial assistance towards the acquisition of assets of national heritage that are at risk of loss.

HLF complements the NHMF role by providing grants to sustain and transform heritage through projects that make a lasting difference for heritage, people and communities.

We help people to get involved in the UK's heritage and make a positive impact by enriching lives and communities, and bringing economic value to the UK. We do this across all parts of the UK whilst being reflective of the different operating environments we operate in. We seek to respond sensitively and seek to adapt to the different circumstances across the UK and to reflect the varying Policy Directions we receive.

We have established a reputation built on trust and confidence. We are trusted by the public, stakeholders and Government to distribute funding wisely and in support of successful projects.

We are an expert in grant making. We are independent, measured and focused on quality.

We have developed the relationships, and skills, to work with others in partnership to improve heritage and the quality of people's lives.

In 2018-2019 we will be undergoing a transition to our new Strategic Funding Framework for 2019-2024, and starting to implement our first Corporate Strategy for 2018-2021 through a business transformation programme.

We have recently consulted stakeholders on our vision, role and priorities. Building on earlier consultation with National Lottery Players, validated by a large-scale survey of the general public, and supported by our 2017 Tailored Review, we have ambitious plans to extend our reach and the impact of National Lottery investment, and diversify both our income and role.

# 1. Introduction, our aims and our values

## 1.1 Background

This business plan sets out what we are aiming to achieve in 2018-19, and the resources that we plan to use in that year. This covers both the National Heritage Memorial Fund (NHMF) and the Heritage Lottery Fund (HLF).

The National Heritage Memorial Fund was set up by Parliament in 1980 to save the most outstanding parts of our heritage at risk of loss to the nation, as a memorial to those who have given their lives for the United Kingdom. NHMF is unique in its ability to provide financial assistance towards the acquisition, preservation and maintenance of such a wide range of heritage treasures from trains to masterpieces of art, wildlife havens to manuscripts.

The past 12 months have seen NHMF award grants to a broad sweep of the UK's most important heritage:

- NHMF helped to fund two export stopped items this year. Particularly pleasing was that the Potteries Museum and Art Gallery managed to acquire the First Day Wedgwood vase. They previously secured an NHMF grant for acquisition but failed to secure the vase at auction. The vase subsequently had an export deferral licence placed on it, allowing the museum a second chance. Another grant from NHMF meant the vase was returned home to the Potteries. After a sale to the Metropolitan Museum of Art New York last year, a bust of Queen Victoria by Alfred Gilbert was subject to an export licence deferral because it met all three Waverley criteria. The Fitzwilliam Museum in Cambridge was successfully raised funding and the bust has joined their established collection of works by Gilbert.
- Unusually we supported two museums in the same auction to acquire archival material related to Sir Marc Brunel. Between them they were able to acquire the majority of items for sale from this important Brunel family collection. The Brunel Museum acquired an album of 30 watercolours of and designs for the Thames Tunnel, compiled by Sir Marc Brunel in 1834. The SS Great Britain Trust acquired material which includes both engineering and personal family items related to Sir Marc.
- The Victoria & Albert Museum acquired a very different archive; a set of fifty one original designs by the 19th century architect and designer Owen Jones, which were hand painted for his book *Examples of Chinese Ornament* (1867.) Jones derived some of his designs from studying objects in what was then the South Kensington Museum and is currently known as the V&A.

- We also supported the acquisition of two watercolours by the outstanding British artist, Eric Ravilious. In particular, the Fry Art Gallery in Essex was able to secure a work very close to their hearts. *Two Women in the garden* which depicts Charlotte Bawden and Tirzah Garwood, Ravilious' wife, in the garden of Brick House in Great Bardfield. This village, where Ravilious was part of the artists' community of the 1930s and 40s, is a close neighbour to the gallery.
- Two highly significant archaeological acquisitions were grant aided by NHMF. The National Museums of Scotland acquired the Galloway Hoard, the most important Viking hoard to be found in Scotland, exceptional as an assemblage of rare items. Ely acquired the East Cambridgeshire Bronze Age Gold torc dated to c1300-1100BC. The torc is larger than any other from the Bronze Age found in England.

A small grants team handles the UK wide NHMF grants business.

In 1994, the NHMF and its trustees were also given the task of distributing the heritage share of National Lottery money for good causes, which it now operates through the Heritage Lottery Fund (HLF).

The NHMF operates as an Arms-Length Body from government under the sponsorship of the Department for Digital, Culture, Media and Sport. We work under the direction of a Board of Trustees. Our chair is Sir Peter Luff.

The NHMF continues to act as the fund of last resort, being able to act very quickly in emergencies. The Heritage Lottery Fund gives grants to sustain and transform heritage through projects that make a lasting difference for heritage, people and communities.

Although our origins are in the NHMF, this now accounts for a small but still important element of our work - about £5M a year in grants. HLF is otherwise the main focus of our activity on which we expect to spend around £190M in 2018-19 in grants.

## **1.2 Aims**

Using money raised by National Lottery players, the Heritage Lottery Fund role is inspiring, leading and resourcing the UK's heritage to create positive and lasting change for people and communities, now and in the future.

## **1.3 Our impact as HLF**

- Over the last twenty-four years we have been trusted by the public, stakeholders and successive governments to distribute National Lottery money wisely, supporting successful heritage projects right across the UK;
- We are an expert grant maker, experienced in ensuring that our funding achieves great results. We are independent, considered and focused on quality;

- We have developed the relationships and skills to work with others to improve heritage and quality of life across the UK and;
- Thanks to National Lottery players, our investment has had an enormous impact on the nation's heritage, transforming it for people and communities. With around £190M to distribute this year, HLF will be one of the most important sources of heritage funding, and will continue to make investments which unlock the huge potential of the UK's heritage.

In 2018-2019 we will build on our track record, taking initial steps to extend our reach and impact, and diversify our income and role, as we implement our Corporate Strategy.

## 1.4 Our values

We use our values to underpin and support our strategies for grant giving for the remainder of the current Strategic Framework, and in planning for the next to run from April 2019 onwards. They will also play a crucial part in underpinning the new corporate strategy for the organisation itself, as well as how we work on a day to day basis.

In our work we aim to:

Always act with **integrity** by being impartial and professional.

Be **trusted** for our expertise and judgement.

Be **collaborative** by working in and learning from partnerships across HLF, with stakeholders and National Lottery players.

Be **inclusive** by embracing all aspects of heritage, and the interests of all people and communities.

Be **forward looking** by advancing the cause of heritage, encouraging new and innovative thinking.

These values define:

- A fundamental part of our culture and the way we work;
- A framework for our leadership and management and,
- Our behaviours.

During 2018-19, we will continue to build these values into our strategic and business planning, incorporate them into our business transformation programme, make them an integral part of a new performance management system and promote them through internal communications.

## 1.5 How we are organised

We have four departments: Operations, Strategy & Business Development, Communications, and Finance & Corporate Services.

Scotland, Wales, Northern Ireland and each of the English regions have a dedicated local team within Operations providing advice and support to applicants, and assessment and monitoring of grant applications. Each team provides a common service to their areas but adapted and devolved to the particular local needs.

Our Board is made up of 14 appointed trustees in total, including the Chair, bringing differing areas of expertise. In 2018-19 we will see several Trustees retire after their terms and we expect replacements to be appointed early in 2018-19. These new trustees will have a full induction process. They meet throughout the year and consider grants for non-delegated programmes – the larger spending programmes with awards above £1M, and some specific national programmes. The Trustees represent all parts of the UK.

Country and regional committees covering Scotland, Wales, Northern Ireland and the English regions approve grant decisions for programmes with spend from £100K to £1M.

Senior Operations staff have delegated authority to approve grants of up to £250K under the Resilient Heritage programme.

Operational staff have delegated authority to approve smaller grants on a local basis where these are below £100K.

In 2018-19 we will undertake a review of our organisational design to look critically at our skills, competences and our organisational effectiveness to support our new corporate strategy, and to respond to the Tailored Review undertaken by DCMS last year.



## **2 Our Corporate Strategy**

### **2.1 Overview**

Our Corporate Strategy for 2018-2021 reinforces the direction we've been taking for several years, setting out our role as the largest dedicated source of funding for heritage across the UK, and taking further steps towards a stronger leadership position, with a particular focus on the opportunities beyond pure grant giving. The goal is to drive change and increase our impact across the UK's heritage, by strengthening our leadership role and standing up for the benefits that heritage can deliver to society.

### **2.2 Current position and drivers for change**

With reduced public funding and reduced National Lottery investment the need to diversify sources of income for the UK's heritage is pressing. Trends in private and social investment suggest opportunities, but the sector as a whole needs further support to build capacity to engage and work with these. Through our National Lottery money we can lever investment from others into the heritage market, and there is evidence that relatively small-scale interventions in capacity building can increase income generation in the sector. But we also need to make efficiencies in our own business to address the challenge of reduced income. New market opportunities may enable us to do this by increasing the volume of our grant-making and thereby providing economies of scale.

### **2.3 Market opportunities for HLF**

We have identified opportunities to leverage other sources of money to grow and diversify the funding market for the UK's heritage, whilst building a strong and sustainable business model for HLF in the face of a challenging financial climate. We are pursuing a new business development strategy to complement our National Lottery and Memorial Fund grant-making activity. We are currently exploring viability and market testing of opportunities in a range of areas. We will take forward the ideas with most potential during 2018-2019 and develop full business plans.

### **2.4 Our vision and role**

Our vision is that by 2021 HLF will be a strong strategic, thought leader and change-maker for the full breadth of heritage across the UK, demonstrating and championing the impact and benefits to society that heritage achieves, and leveraging investment and support from others to strengthen this position. Heritage will be more widely recognised as a vital contributor to the nation's GDP, social cohesion, better places and individual well-being.

We will deploy National Lottery income as grants, loans or other financial interventions where they will create most long-term value for society. We have described this change in our role as moving from distributing money raised by the National Lottery to make a lasting difference for heritage and people in the UK, to:

Inspiring, leading and resourcing the UK's heritage to create positive and lasting change for people and communities, now and in the future.

We recognise the significant challenges involved in delivering a more ambitious role and expanded impact for HLF at a time of retrenchment and reducing income. The business transformation programme (see section 4) will be key to navigating these and achieving our vision for the future.

### 3 Our response to the Tailored Review

The review was a positive endorsement of our work and its breadth, and shows that HLF is a highly regarded organisation that has transformed communities and heritage across the UK.

Tailored reviews take place for all non-departmental public bodies every few years, and DCMS consulted with our stakeholders to find out their views about how we are working.

DCMS concluded that we perform well as an organisation, with 79% of survey respondents seeing us as a 'very' or 'extremely' effective funding body.

Our staff are highly regarded as open, helpful and valuable sources of support, and our role as a UK-wide funder with a sole focus on heritage is highly valued.

The review notes that HLF is operating within the context of reducing National Lottery receipts and local authority funding. As a result, it recommended that HLF should become more strategic, effective and efficient to ensure National Lottery funding continues to support the resilience of the heritage sector, benefits people and preserves heritage for future generations.

[The review made a series of recommendations](#) for how we can further strengthen our effectiveness and performance. These include clarifying our priorities in our upcoming Strategic Funding Framework and strengthening our strategic partnerships with other funders, experts and Governments across the UK.

[Many of the recommendations are already being implemented](#), including strengthening communications, data management, research and evaluation.

We published an implementation plan (see link above) to track and deliver the recommendations. We will continue to work hard with DCMS and other partners, to ensure maximum value for National Lottery players and the best possible support for the heritage sector.

## 4 Transforming how we work

Like all organisations, we recognise we need to adapt and change how we work in the evolving environment we work in.

That environment has changed in many ways. For example, the referendum to leave the European Union, the continuing devolutionary arrangements across the UK, the impacts of austerity and reduced public sector spending are just a few headlines.

The Tailored Review last year, whilst recognising our achievements over the last two decades, also recognised the need for us to adapt and change to respond to this different environment, and provide even better value for money for National Lottery players and the communities and sectors we serve.

We have therefore set up a business transformation programme to change the way we work. Last year saw the preliminary planning and preparation for this work, and 2018-19 will be the first year of delivery and implementation. We expect this transformation to happen over three years before it is fully completed.

To make HLF 'fit for the future', the programme's goals are to deliver:

- The new three-year Corporate Strategy starting in March 2018;
- A simpler, more customer-focused National Lottery funding framework in 2019;
- A radically improved grant management process and system in 2020;
- IT modernisation to improve operational efficiency and customer satisfaction;
- The corporate infrastructure (skills, structure, and support services) to support our strategic direction and,
- More agile ways of working and a stronger, more positive culture.

The programme currently comprises the areas below, underpinned by programme management, change communication and change management activities.

- Corporate Strategy delivery;
- Strategic Funding Framework delivery;
- Process redesign;
- Governance and decision-making changes;
- IT modernisation and digital;
- People and estates and,
- Brand, marketing and communications.

## 5 Our strategy for National Lottery grant giving

### 5.1 Strategic Framework 4 2013-2019

2018-19 will be the final year of HLF's Strategic Framework 2013-19, *A lasting difference for heritage and people*. In this Framework we have remained true to the core principles that have defined our distinctive approach since 2002 - we invest in the full breadth of the UK's heritage, and have identified outcomes we want our funding to achieve for heritage, people and communities.

Following a review of the Framework at its mid-point (September 2015), we delivered a range of responsive measures in 2016-17 in the areas of organisational resilience, skills and young people. These were launched in 2016-17 and applications approved in 2017-18. A number of projects across the UK are now in delivery following an investment of more than £20M.

Trustees agreed to extend the current Strategic Framework for a further year to 2019, and undertake full consultation on the next Strategic Funding Framework during 2017-18 and 2018-19 whilst linking this into the Tailored Review conducted by DCMS that reported in November 2017 (see above).

### 5.2 Our project outcomes

In assessing applications, we take account of the broad range of outcomes we know heritage projects can deliver, give extra weight to those outcomes we value most, such as learning, and are proportionate in our expectations of projects at different levels of grant. The project outcomes we assess are:

#### Heritage outcomes

With our investment, heritage will be:

- better managed\*
- in better condition\*
- better interpreted and explained
- identified and recorded.

#### Outcomes for individuals

With our investment, people will have:

- learnt about heritage\*\*
- developed skills\*
- changed their attitudes and/or behaviour
- had an enjoyable experience
- volunteered time.

#### Outcomes for communities/society

With our investment:

- environmental impacts will be reduced\*
- more people and a wider range of people will have engaged with heritage\*
- organisations will be more resilient
- local economies will be boosted

- local areas/communities will be a better place to live, work or visit.

\*These outcomes are weighted for grants over £100K in our open programmes

\*\*This outcome is weighted for all grants in our open programmes

## **6 Strategic Framework 4 – our progress to date**

### **6.1 Grant programmes and initiatives**

We continued six programmes from our previous Strategic Plan (Heritage Grants, Your/Our Heritage, Parks for People, Landscape Partnerships, Townscape Heritage and Young Roots). In the first two years of the Strategic Framework we then added 6 new rolling programmes (Sharing Heritage, Start-up Grants, Transition Funding, First World War: Then and Now, Grants for Places of Worship and Heritage Enterprise), and 5 time-limited initiatives (Skills for the Future, Catalyst umbrella, Catalyst small grants, Catalyst Endowments, and Collecting Cultures).

We reviewed our progress and achievements at the mid-point of the framework in 2015-16, and as a result identified a number of new developments and priorities which we delivered in 2016-17: a new Resilient Heritage programme; a third investment in Heritage Endowments with match-funding grants; a third round of the Skills for the Future programme; and a young people's programme Kick the Dust.

In 2017-2018 we completed the roll out of the Great Place Scheme UK wide, with awards in Scotland, Wales and Northern Ireland, and ran a second investment in Re-thinking Parks (see below). We also took steps to begin simplifying and streamlining our programme portfolio, making our overall grant-making offer easier for applicants to navigate. We made the last awards under our Grants for Places of Worship programme and produced new guidance and resources to support places of worship in making applications through the open programmes, Our Heritage and Heritage Grants.

### **6.2 Balance and spread of funding**

To ensure we achieve an optimal balance and spread of funding, we made three spending commitments in our Strategic Framework:

- Around 75% of funding would be available through “open programmes”. In 2017-18 this was 74%;
- £30M a year would go to small grant programmes (under £100K) – we have achieved this to date and,
- Delegation of grants up to £2M to country and regional committees/teams (£2M limit applied to years up to and including 2017-18) – we have achieved this too.

### **6.3 Leadership and sharing learning**

We continued to engage with the Government's White Paper in England in 2017-2018. We contributed expertise to the Taylor Review: sustainability of English churches and cathedrals. As part of our response, we are working in partnership to deliver an innovative and capacity building fund to support congregations in transforming how they care for places of worship, alongside the National Churches Trust, All Churches Trust, the Plunkett Foundation and the Pilgrim Trust.

Alongside the Arts Council England, we contributed research, data and advice to the Mendoza Review of museums in England. We have developed a Memorandum of Understanding with the Arts Council England governing our work with museums in

England in 2018-2019 and begun to deliver other responses to the review. We also contributed to the DCMS' Digital Culture project, which reported in March 2018, and have made policy commitments to build the capacity of the heritage sector to use digital technology more effectively to conserve heritage and engage people with heritage, as well as to become more resilient.

Also with Arts Council England, we contributed to a pilot crowd funding match funding scheme for cultural organisations, run by NESTA. Results of this research project were launched in October 2017, demonstrating significant non-financial benefits from crowd-funding for the organisations involved. We are asking for views on the future role of matched crowd-funding in our Strategic Framework 2019-2024 consultation.

In line with our Tailored Review recommendations and direction of our Corporate Strategy, in 2017-2018 we made our first commitment to an Impact Fund to distribute loans to the heritage sector, to be run by the Architectural Heritage Fund with contributions from Historic England, Historic Environment Scotland and Charity Bank. We are investigating other ways in which HLF can become an investor in impact funds.

Our second *State of UK Public Parks* report provided comprehensive evidence for the Parliamentary Communities and Local Government Committee Inquiry into the *Future and Funding of Public Parks in England* which was held in November 2016, and at which HLF gave both written and oral evidence. In December 2017, we re-formed our partnership with Big Lottery Fund England and Nesta to run a second phase of our successful Re-thinking Parks initiative. The initiative supports park managers and users to replicate successful park funding and management models tested in the first phase, whilst also offering funding to prototype new innovations using digital and technology to make parks more financially sustainable. We aim to support over 15 projects across the UK with a total joint grant budget of £2m. We have set aside a further £5m for investment in an innovation programme in 2018-2019, Future Parks.

We have further developed our online communities as a focus for sharing learning and good practice across the sector. We provide an open space for applicants and grantees to share information, advice and questions about any kind of heritage project. Our forums around Parks, Landscapes, Young People, Skills and Resilience continue to provide a focus for those with shared interests around these themes. We will continue to promote these in 2018-19.

#### **6.4 Preparing for our new strategic funding framework from 2019**

In 2017-2018 we undertook extensive consultation with National Lottery Players, the general public, external stakeholders, staff and committee members on views about heritage and the future of National Lottery investment in heritage under our next Strategic Funding Framework for 2019-2024.

For the first time we explored in depth National Lottery players' ambitions for the income generated through the tickets they buy. Their [vision](#) for the UK's heritage, and the wide-ranging social and community benefits that investment in heritage can offer, has helped shape our consultation with stakeholders and the general public from January to March 2018. This was also informed by discussion sessions held with heritage stakeholders alongside our Tailored review in spring 2017. We will be discussing the findings with our



Board in April and May, publishing our feedback on the consultation and how we will respond in September, and launching our new programmes and the Strategic Funding Framework itself in January 2019. Alongside these strategic discussions and communications, we will be developing the guidance, resources, business processes and website to support the SFF from 2019, and briefing and training our staff and committee members.

2018-2019 will be a transitional year. As we manage a reduced grant budget of £190M we have minimised the number of separate programmes we offer, closing the Landscape Partnerships and Parks for People programmes to new applications. Applicants with parks and landscape projects will be able to apply through the Heritage Grants programme. We have also announced that we will pause the Major Batch grants over £5M in 2019-2020 while we consider the responses to our consultation so there will be no Major Batch deadline in 2018-2019.

To enable the transition to the new Funding Framework to be delivered as efficiently and effectively as possible, we will close our larger grant programmes to new applications in August, for final decisions in December. Applications through our delegated programmes Our Heritage, Resilient Heritage, Sharing Heritage, First World War: Then and Now, and Young Roots will continue throughout the year with final decisions in March 2019.

## **7 Our focus in 2018-19**

### **7.1 Challenges**

We recognise that 2018-19 is set to be a demanding and challenging year.

The operating environment for heritage overall remains extremely volatile with the uncertainty, and social impacts, associated with the UK's vote to leave the EU in June 2016 a significant change. A more uncertain climate for the National Lottery in recent years has also contributed to increased volatility in returns to the good causes, following record returns in recent years.

Nonetheless we expect to be able to make awards totalling £190M in 2018-19. We will continue to work closely with Camelot, Gambling Commission, DCMS and the other lottery distributors to understand the underlying trends and impacts on future income projections.

In the meantime, we have developed a flexible approach that aligns income, commitments and our reserves to ensure that these do not get out of kilter. Our financial objective is to protect existing investment as far as possible, whilst bringing on stream new projects as we continue to invest in the heritage sectors across the UK. We will seek to maximise the spread and distribution of grants below £100K across all countries and regions, whilst still making investments in larger projects too, albeit on a reduced basis.

We will seek to carefully manage and address the challenges through our management of risk, relationships and business approach.

#### **Challenges for the UK**

- Continued austerity across the UK, with the impact of reduced public expenditure continuing to put pressure on additionality of the National Lottery spend;
- Uncertainty generated by Brexit, and the nationalist sentiment, social divisions and plural identities of 'Britishness' that this has highlighted and;
- Devolutionary developments at local level in England and individual country issues across the UK.

#### **For heritage a need to:**

- Develop new sources of sustainable income;
- Foster more diversity and be more inclusive;
- Build capacity and skills, in order to be more inclusive and more entrepreneurial;
- More actively demonstrate its role in wider social and economic agendas – e.g. - health and well-being, regeneration;
- Act as a focus for public and community involvement through asset transfers and community businesses and;
- Stay relevant in a digital age with other urgent social and economic pressures.

## 7.2 Corporate priorities

Delivering our HLF grant programmes in accordance with our current strategic framework, and our NHMF grants in line with our funding agreement, is the core of our work and the starting point and context for our annual priority-setting. This comprises the vast majority of our activity and is reflected in our departmental plans, staff objectives and personal development plans. This is even more critical in 2018-19 as we transition from one strategic funding framework to a new one.

We will continue to provide locally based support to applicants and grantees across the UK, responding quickly and effectively to changing demand, ensuring access to our funding, and being ready and able to deal with projects facing difficulty and protect our investment.

We will maintain our progressive agenda, working responsively and collaboratively to support the sector. We will continue to make a compelling, evidence-based case for the value and impact of heritage, and the vital role of National Lottery funding. In doing so, we will ensure we are accountable to governments, the sector that we serve, as well as National Lottery players too.

We place a high value on our staff, respecting their professionalism and commitment alongside their skills and competences. We will try to enhance all of these through our learning and development opportunities.

In this context we have identified the following priorities for 2018-19, and grouped these into areas of common themes:

<b>Priority – Headline/Title</b>	<b>What does this mean? (the what)</b>	<b>What are we going to do to deliver this priority? (the how)</b>
Delivery of the first phase of business transformation programme.	<ul style="list-style-type: none"> <li>Business Transformation team to deliver first phase of the business transformation programme.</li> </ul>	<ul style="list-style-type: none"> <li>Lead, manage and resource the programme appropriately;</li> <li>Engage our leaders in the changes;</li> <li>Communicate and engage staff in the changes and,</li> <li>Deliver the approved investment and projects.</li> </ul>
Implementation of the new Corporate Strategy.	<ul style="list-style-type: none"> <li>All Departments to consider the implications of the Corporate Strategy for their areas of work and set out plans for implementation.</li> <li>Corporate Strategy to be communicated to</li> </ul>	<ul style="list-style-type: none"> <li>Set out our plans for implementation by 30 April 2018;</li> <li>Cascade the new strategy across the Fund;</li> <li>Promote via our website;</li> <li>Complete feasibility of new business options by April 2018;</li> <li>Draw up an implementation plan and identify any new resources we need and;</li> <li>Support the delivery of a diversified business model, including brand</li> </ul>

Priority – Headline/Title	What does this mean? (the what)	What are we going to do to deliver this priority? (the how)
	<p>all staff and decision takers.</p> <ul style="list-style-type: none"> <li>• Short designed version produced for external audience.</li> <li>• Feasibility study of new business opportunities; followed by plan to resource and implement actions.</li> </ul>	<p>development and marketing plans for any new products/services.</p>
Implementation of Tailored Review, Mendoza Review and DCMS Digital Project recommendations.	<ul style="list-style-type: none"> <li>• Tailored Review implementation plan drawn up and monitored monthly, with regular reports to DCMS.</li> <li>• SBD to lead on delivery of recommendations of Mendoza Review and grant-making commitments of Digital Project; with resources to be identified for the latter.</li> <li>• SBD to lead on delivery of more strategic priorities, and other actions identified for the next Strategic Funding Framework.</li> </ul>	<ul style="list-style-type: none"> <li>• Complete SFF consultation and tie together responses to Tailored Review;</li> <li>• Work with DCMS and ACE on the development of the Mendoza Review Action Plan;</li> <li>• Implement Memorandum of Understanding with ACE;</li> <li>• Develop campaign of digital capacity-building grants for launch in 2019/20;</li> <li>• Work with ACE and partners to pilot Digital Maturity Index and Digital Culture Code;</li> <li>• Ensure progress against review recommendations is published and;</li> <li>• Continue to implement improvements from Business Process Review, in line with simplification agenda and develop options for new grant management process/system.</li> </ul>
Transition year for new Strategic Funding Framework (SFF).	<ul style="list-style-type: none"> <li>• Operations and SBD to coordinate simplification of portfolio for 2018-19.</li> <li>• Consultation and policy development for SFF 2019-24.</li> </ul>	<ul style="list-style-type: none"> <li>• Simplified portfolio to be delivered;</li> <li>• Public and stakeholder consultations completed and built into delivery planning;</li> <li>• SFF to be delivered to agreed timetable, including new resources, online forms, and policy changes;</li> <li>• Deliver a new website which supports the new SFF;</li> </ul>

Priority – Headline/Title	What does this mean? (the what)	What are we going to do to deliver this priority? (the how)
		<ul style="list-style-type: none"> <li>• Prepare for roll-out of SFF, including ‘strategic campaigns’ in 2019/20;</li> <li>• Continued management of the existing grant portfolio across the UK;</li> <li>• Ensure staff are trained on new processes pre SFF launch and;</li> <li>• New Priority Development Areas (or equivalent) in place for new SFF launch.</li> </ul>
Managing implications of lottery income changes.	<ul style="list-style-type: none"> <li>• We will work with GamCom, DCMS and Camelot on revised projections and modelling.</li> <li>• We will put into place new budgetary arrangements agreed by the Board for budgets.</li> <li>• We are tracking and reporting on revised budgets and arrangements.</li> <li>• We will continue to handle and manage risks coming from the lottery income position.</li> </ul>	<ul style="list-style-type: none"> <li>• Agree revised income projections and model with Camelot, GamCom and DCMS;</li> <li>• Agree more transparent reporting and data with GamCom, DCMS, Camelot;</li> <li>• Track impacts of budgets and new arrangements nationally, and by country/region, programme;</li> <li>• Report on risks to Board of new arrangements alongside new financial reports and indicators/KPIs and;</li> <li>• Provide strategic communications advice to manage expectations and ensure staff/sector/customers/governments feel well informed.</li> </ul>
Digital project incorporated in Business Transformation programme.	<ul style="list-style-type: none"> <li>• Making digital a key feature throughout the Heritage Lottery Fund’s Business Transformation programme, with a particular focus on upskilling staff.</li> </ul>	<ul style="list-style-type: none"> <li>• We will ensure that digital capability is a significant feature in our own Business Transformation programme and;</li> <li>• We will appoint a Digital Trustee to our Board, a new senior post to lead work internally and in its grant-making in the 2018-19.</li> </ul>
Supporting the National Lottery brand and developing the HLF brand.	<ul style="list-style-type: none"> <li>• Providing support to the National Lottery brand and developing the HLF brand.</li> </ul>	<ul style="list-style-type: none"> <li>• Embed the shared One National Lottery in our communications and wider work;</li> <li>• Promote National Lottery funding by increasing public/player awareness of the contribution heritage projects make to</li> </ul>

Priority – Headline/Title	What does this mean? (the what)	What are we going to do to deliver this priority? (the how)
		<p>communities and individuals across the UK;</p> <ul style="list-style-type: none"> <li>• Continue to improve grantee recognition of The National Lottery through enhanced partnership working and improved acknowledgement approach and resources and;</li> <li>• Promote/market our expertise, knowledge and research, advocating the value of heritage as a good cause and supporting the emerging Corporate Strategy as appropriate.</li> </ul>

## 8 Our people

We recognise that our skilled and dedicated workforce are our greatest asset and that the successful delivery of our corporate strategy and business objectives will only be delivered through continuing investment in our staffing resources. In 2018/19, as part of our Business Transformation Programme, we will be commencing a review of our organisational structure and processes to ensure our services are able to meet the future needs of our staff, customers and stakeholders. Linked to this work, we will also review our staff policies and procedures, invest in a new HR Management Information System, and focus our HR services to better support managers led and manage their people.

We will continue our investment in learning and development for our staff, to ensure they have the skills and competences to deliver our goals, and we will also be undertaking actions to strengthen our commitment to diversity and inclusion in our workforce (see below).

### 8.1 Our staffing details

During 2018-19 we expect to employ about 265 staff (full time equivalents), either in permanent roles, or in fixed term appointments.

These staff will be deployed in our departments as follows:

Operations:	Around 66% of our staffing
Strategy & Business Development:	Around 11% of our staffing
Communications:	Around 8% of our staffing
Finance & Corporate Services*:	Around 14% of our staffing
Business Transformation	Around 1% of our staffing.

*(\*Includes our Secretariat, Chief Executive and her office support)*

Our staff are employed in different grades across our organisation according to the responsibilities and scope of their roles, and details of the grades, structures, etc. can be found on our website and at the [direct.gov.uk](http://direct.gov.uk) website.

### 8.2 Our commitment to diversity and equality

We recognise and appreciate the value of having a diverse staff group, and recognise our responsibilities to ensure that all of our staff processes are equitable and transparent. We also recognise the role that our staff play in leading and supporting diversity in our grant making processes and the wider heritage sector, including ensuring applicants for our funds promote inclusion and diversity in their projects.

We actively promote diversity and equality through our organisation and in our recruitment and selection processes.

Our staff diversity details are:

Gender Profile: Female 76% and Male 24%

Ethnicity Profile: White 77 %; BAME 11%; Undeclared 12 %

Declared disability: 4%

Age Profile: Under 40 years 51%; 41-60 years 46%; and 61 years + 3%

We will be undertaking further work to promote and champion a diverse workforce in 2018/19, including benchmarking our policies and processes against national best practice. We will endeavour to ensure that our staff diversity reflects the diversity of our customers and stakeholders.



## 9 Our grant programmes

### 9.1 Overview

#### National Heritage Memorial Fund

In 2018-19 we will receive £5M Grant In Aid as the second year of our new settlement for the NHMF. We continue to prudently invest the NHMF Endowment Fund to align with our investment strategy, and try to retain the value of the endowment at par to the initial grant in 1980. The successful investment of our Endowment Fund means from 2018-19 we will generate an extra £750K to add to the Grant in Aid budget for further grants from the Memorial Fund.

#### Heritage Lottery Fund

We estimate that our share of the National Lottery good causes income will be £290M to £300M for 2018-19. Along with DCMS, we continue to monitor income levels and fluctuations to ensure they remain consistent with optimising the level of grant giving, setting prudent levels of commitments (given that many projects take some time to complete), and maintaining a sensible level of funding of our reserves in the National Lottery Distribution Fund (NLDF).

Our grant budget will therefore be £190M for 2018-19. As we position for the new strategic funding framework we will also align our programmes to be the core open programmes.

Our programmes in 2018-19 will be;

- Grants over £1M and those determined on a UK-wide basis - about £93M will go to grants of £1M+
- Grants under £1M delegated to the English regions, Northern Ireland, Scotland and Wales will amount to £46M
- Grants under £100K delegated to officers across the UK will amount to £46M.

### 9.2 Our programme budgets for 2018-19

The planned programme budgets are:

Heritage Grants (Under £1M)	£46M*
Heritage Grants (£1M to £5M) and (over £5M)	£80M*
Our Heritage/Sharing Heritage/Young Roots	£36M
First World War: Then and now	£2M
Resilient Heritage	£8M
Future Parks	£5M
Townscape Heritage	£8M**
Contingency	£5M

\*Including Heritage Enterprise

\*\* Programme closed in 2017-18, final decisions will be made in 2018-19.

### **9.3 Our open and targeted programmes**

Our open programmes for 2018-19 will be:

#### **Heritage Grants Programme**

This offers grants over £100K for projects that make a lasting difference for heritage, people and communities in the UK. It caters for all types of heritage and a wide range of projects, including the very largest and most complex. To receive a grant, projects requesting less than £1M must achieve at least one of our outcomes for each of heritage, people and communities, projects requesting £1M or more should achieve more than one outcome for each.

#### **Our Heritage**

Our Heritage offers grants from £10K to £100K for all types of heritage projects, including small and medium-sized capital projects (for example, smaller parks and green spaces, community buildings, museum collections and archives), as well as activity projects exploring language, cultures and memories. To receive a grant, projects will need to achieve at least one outcome for heritage and one outcome for people.

#### **Sharing Heritage**

Sharing Heritage is for the smallest grants of £3K to £10K. This grants programme is for any not-for-profit group wanting to explore, share and celebrate their community's heritage. Activities we can support include events, celebrations, producing local history publications, conservation of individual heritage items, acquisitions, volunteer training and support. To receive a grant, projects will need to achieve at least one outcome for people.

Our targeted programmes for 2018-19 are:

#### **Resilient Heritage**

Resilient Heritage offers grants from £3K to £250K to organisations seeking to increase their capacity and capabilities to withstand risks, and pressures, in their operating environment, and to become more financially sustainable. It is a flexible programme open to past grantees of HLF and new groups, and funds all of the types of activity previously supported through Start-up Grants, Transition Funding and Catalyst small grants, as well as enabling some innovative approaches and ways of working.

#### **Heritage Enterprise**

The Heritage Enterprise programme offers grants of between £100K and £5M for the conservation and adaptation of historic buildings for an end-use that actively contributes to sustainable development. The programme supports projects that seek to bring back historic buildings into active commercial use, helping to improve the local built environment whilst at the same time stimulating economic growth.

## **Young Roots**

The Young Roots grant programme is for young people aged 11 to 25 years old who want to explore their heritage and develop skills. Grants of between £10K and £50K are available for partnerships of heritage, and youth organisations, to help young people shape and deliver their own projects.

## **First World War: Then and Now**

This programme offers grants between £3K and £10K for local, community projects which explore, learn about, and share the heritage of the First World War. The programme aims to leave a legacy of First World War community heritage to mark the centenary. This is in addition to the First World War projects we are likely to support through our other grant programmes. This will be the last year of this programme with final decisions in March 2019.

We will continue to evaluate programmes to understand their impacts, benefits and value so that we can apply lessons learned to improve the programmes.

## 10 Our operating costs

We recognise the importance to National Lottery players and taxpayers that they wish to maximise the amount spent on grants, and to keep our own costs on administration down to the minimum level.

We are set a limit by DCMS that our total lottery operating costs should be less than 8% of National Lottery income. Our track record on achieving this has been good to date:

2014-15	5.2%
2015-16	5.8%
2016-17	6.9%
2017-18	6.6%

DCMS have also set a limit for processing costs to be no more than 5% of National Lottery Income. Our track record on achieving this has also been good to date:

2014-15	3.7%
2015-16	4.1%
2016-17	4.8%
2017-18	5.0%

In 2018-19 DCMS have agreed to changes in the calculation of our efficiency targets. This will now be a single figure of 8% and be calculated:

- Using a three year rolling average of lottery income (two years actual plus one years projected);
- Excluding non-recoverable VAT and,
- Excluding exceptional items.

We expect to meet the 8% target in 2018-19. The target will decrease to 7.75% in two years' time.

## 11 Our Service Standards

We have set targets in our Strategic Framework to deliver timely and satisfactory services to our applicants and grantees as follows:

### 11.1 National Heritage Memorial Fund Decisions

The decision on an application will normally be taken at the next available decision meeting following assessment in:

Urgent acquisitions            3 months

Other projects                6 months

Grant payments will be made to the grantee within 15 working days from receipt by NHMF of the payment request.

### 11.2 Heritage Lottery Fund Decisions

A number of our grant programmes have published application deadline and decision dates. We will meet those deadlines.

For those applications without fixed deadlines, decisions will normally be taken at the next available decision meeting following assessment in:

Heritage Grants first round            12 weeks

Heritage Grants second round        12 weeks

Heritage Grants Major Batch second round 12 weeks

Heritage Enterprise first round        12 weeks

Heritage Enterprise second round     12 weeks

Landscape Partnership second round   16 weeks

Grants for Places of Worship first round 12 weeks

Grants for Places of Worship second round 12 weeks

Townscape Heritage second round     12 weeks

First World War: Then and Now        8 weeks

Our Heritage (including transition funding) 8 weeks

Sharing Heritage (including Start-up grants) 8 weeks

Young Roots                                8 weeks

### **11.3 Grant Payments**

Grant payments will be made to the grantee within 9 working days from receipt by HLF of the payment request.

### **11.4 Customer Satisfaction**

We will undertake a survey of successful and unsuccessful applicants, and aim to maintain customer satisfaction with our assessment processes at no less than 80%.

We will undertake a similar survey of those to whom we have awarded grants, and aim to maintain customer satisfaction with our monitoring and post-award processes at no less than 85%.

The proportion of applicants that find the HLF website easy to use will be at least 87%.

We will publish decisions on our website within a maximum of twenty working days, and will actively promote a wide selection of our awards via the media, to generate awareness amongst potential applicants and National Lottery players.

## 12 Our risks and how we manage these

Like all organisations we face risks. Our approach to managing risks is to mitigate those risks so they come within what we are prepared to tolerate. We recognise that it is often impossible to eliminate risk entirely. We maintain a corporate risk register setting out the main strategic risks to us as an organisation. This is regularly reviewed by the executive staff as well as our Audit Committee and Board. Our main risks that we presently anticipate for 2017-18 are as follows, along with what we will do to manage those risks:

No.	Our corporate risks	Our actions to mitigate these
1	Lottery income declines.	<ul style="list-style-type: none"> <li>• Understand revised projections and long term implications.</li> <li>• Update model for projections.</li> <li>• Work with DCMS, GamCom and Camelot for improved projections and reporting.</li> </ul>
2	Diversifying activities under Corporate Strategy may prove unsuccessful.	<ul style="list-style-type: none"> <li>• Opportunities under strategy being tested for economic viability, costs and benefits.</li> <li>• Governance and legal appraisal review.</li> <li>• Look for additional skills/competences as early part of Organisational Design work.</li> </ul>
3	Tailored Review recommendations are not successfully implemented.	<ul style="list-style-type: none"> <li>• Overall control plan in place.</li> <li>• Sensible timetabling overall and for specific recommendations agreed with DCMS.</li> <li>• Quarterly tracking arrangements in place.</li> </ul>
4	Adverse reaction to business change and transformation.	<ul style="list-style-type: none"> <li>• Clear messages on business transformation.</li> <li>• Early and clear engagement with staff on propose changes.</li> <li>• Specialist internal communications resource appointed.</li> <li>• Baseline data on engagement and morale.</li> <li>• Directors lead engagement on change.</li> </ul>
5	Strategic Funding Framework places too many demands on us to be successfully delivered.	<ul style="list-style-type: none"> <li>• 2018-19 to be transition year.</li> <li>• Delivery plan set out with different phases.</li> <li>• Critical path established with milestones and dates/periods.</li> <li>• Additional resources to be made available as needed.</li> </ul>

## 13 Our commitment to transparency and data publication

We recognise our obligations to National Lottery players and taxpayers in explaining how we use their monies and funding.

We publish on our websites (see below) the following:

- Tenders and contracts worth £10K or more where we are seeking suppliers/business partners to help us deliver our business. We welcome bids from all potential suppliers especially small, medium enterprises whom we haven't worked with as yet;
- Contracts awarded for such services and support where we have let those contracts;
- Our organisation charts and senior staff salaries. These are also published in our Annual Reports and Accounts (which are also available on our websites);
- Our Board and Committee decisions on grant applications;
- Our governance structures;
- Details of our Trustees and Regional Committee members as well as our senior staff charged with the day to day running of the NHMF and HLF;
- Our full Strategic Framework 4;
- Our online communities and opportunities to share experiences and ideas;
- Opportunities for jobs and working with us including committee membership and trustee vacancies when they arise;
- Any special initiatives or programmes;
- Details of all grant programmes with guidance on how to apply, requirements and links to our online portal for lodging applications;
- How we work with you to deliver your project and outcomes;
- Our research and evaluation reports and;
- Other corporate information.



## **14 How to contact us**

If you want to know more about our work please visit us at:

[www.nhmf.org.uk](http://www.nhmf.org.uk) or [www.hlf.org.uk](http://www.hlf.org.uk)

Or you can ring us on 0207 591 6000, or textphone on 0207 591 6255

Or by appointment at:

7 Holbein Place  
London  
SW1W 8NR

## Appendix on our grant programmes: Applications and Awards

Number of applications to all programmes since beginning of Strategic Framework 4

Update after year end for 2017-18 outturn data. KA

Programme	2013-14	2014-15	2015-16	2016-17	2017-18
Catalyst Umbrella Grants	18	-	-	-	-
Catalyst: Endowments	-	-	-	-	-
Catalyst: Small Grants	139	-	-	-	-
Collecting Cultures	-	57	-	-	-
First World War:Then and	564	578	292	252	334
Grants for Places of Worship	375	348	323	324	311
Heritage Endowments	-	-	-	40	-
Heritage Enterprise	43	35	33	36	35
Heritage Grants under £2m	295	283	276	263	297
Heritage Grants £2-5 m	70	48	65	68	63
Heritage Grants Major	19	19	12	24	12
Kick the Dust	-	-	-	67	-
Landscape Partnership	24	23	14	19	22
Our Heritage	1,098	933	867	917	954
Parks for People	33	27	25	17	12
Resilient Heritage Over10k	-	-	-	75	148
Resilient Heritage Under10k	-	-	-	47	72
Sharing Heritage	679	440	619	893	697
Skills for the Future	-	-	-	81	-
Start Up Grants	67	78	105	76	-
Townscape Heritage Initiative	25	30	24	28	23
Transition Funding	31	42	49	28	-
Young Roots	132	170	191	156	125

- n.b. Great Place Scheme information has been added into the Heritage Grants figures.  
Stories Stones and Bones information has been added into Sharing Heritage figures.

Value (£m) of applications to all programmes since beginning of Strategic Framework 4

Programme	2013-14	2014-15	2015-16	2016-17	2017-18
Catalyst Umbrella	7.0	-	-	-	-
Catalyst: Endowments	-	-	-	-	-
Catalyst: Small Grants	1.3	-	-	-	-
Collecting Cultures	-	12.60	-	-	-
First World War:Then and Now	4.5	4.63	2.55	2.25	2.96
Grants for Places of Worship	48.0	50.59	49.12	50.91	48.06
Heritage Endowments	-	-	-	28.20	-
Heritage Enterprise	98.3	73.99	70.36	88.41	62.88
Heritage Grants under £2m	217.8	228.27	209.22	209.02	194.64
Heritage Grants £2-5 m	244.3	168.38	223.30	243.12	211.31
Heritage Grants Major	183.4	203.81	141.48	224.05	103.99
Kick the Dust	-	-	-	52.59	-
Landscape Partnership	48.9	50.13	29.72	36.94	48.20
Our Heritage	63.3	50.61	48.90	50.98	52.75
Parks for People	61.2	45.25	57.03	41.95	26.27
Resilient Heritage Over10k	-	-	-	6.80	12.22
Resilient Heritage Under10k	-	-	-	0.44	0.64
Sharing Heritage	5.43	3.68	5.23	7.71	5.84
Skills for the Future	-	-	-	37.30	-
Start Up Grants	0.7	0.72	0.99	0.69	-
Townscape Heritage	34.4	39.38	35.25	40.47	31.19
Transition Funding	2.0	2.29	3.36	2.11	-
Young Roots	4.5	5.84	7.41	5.98	4.68

Number of awards under all programmes since beginning of Strategic Framework 4

Programme	2013-14	2014-15	2015-16	2016-17	2017-18
Catalyst Umbrella Grants	9	-	-	-	-
Catalyst: Endowments	13	-	-	-	-
Catalyst: Small Grants	125	-	-	-	-
Collecting Cultures	-	23	-	-	-
First World War:Then and Now	336	528	213	215	214
Grants for Places of Worship	187	174	158	179	111
Heritage Endowments	-	-	-	15	-
Heritage Enterprise	11	14	16	12	10
Heritage Grants under £2m	107	88	116	107	94
Heritage Grants £2-5 m	25	18	23	24	15
Heritage Grants Major	8	8	9	6	4
Kick the Dust	-	-	-	-	12
Landscape Partnership	9	9	13	12	8
Our Heritage	463	465	444	487	440
Parks for People	17	12	13	16	10
Resilient Heritage Over10k	-	-	-	36	87
Resilient Heritage Under10k	-	-	-	19	52
Sharing Heritage	385	276	307	480	388
Skills for the Future	39	0	0	18	-
Start Up Grants	22	47	59	45	-
Townscape Heritage Initiative	9	14	9	10	-
Transition Funding	18	22	35	24	-
Young Roots	95	104	118	97	71

Value (£M) of awards under all programmes since beginning of Strategic Framework 4

Programme	2013-14	2014-15	2015-2016	2016-2017	2017-18
Catalyst Umbrella	4.88	-	-		-
Catalyst: Endowments	8.5	-	-		-
Catalyst: Small Grants	1.14	-	-		-
Collecting Cultures	-	5.12	-		-
First World War:Then	2.73	4.19	1.91	1.93	1.89
Grants for Places of Worship	26.78	28.01	28.59	31.12	20.08
Heritage Endowments	-	-	-	10.35	-
Heritage Enterprise	28.89	26.73	16.92	29.45	17.86
Heritage Grants under £2m	97.28	83.37	97.37	110.1	61.15
Heritage Grants £2-5 m	90.75	69.10	88.10	89.80	55.69
Heritage Grants Major	104.39	83.28	100.67	61.50	44.78
Kick the Dust					10.41
Landscape Partnership	21.08	20.27	31.20	24.73	19.71
Our Heritage	25.50	23.72	24.92	26.89	23.32
Parks for People	35.53	36.19	32.43	35.39	27.08
Resilient Heritage Over10k	-	-	-	4.23	6.26
Resilient Heritage Under10k	-	-	-	0.18	0.48
Sharing Heritage	3.06	2.32	2.68	4.11	3.20
Skills for the Future	20.37	-	-	10.13	-
Start Up Grants	0.21	0.44	0.56	0.42	-
Townscape Heritage	11.13	20.91	14.14	17.12	-
Transition Funding	1.19	1.15	2.51	1.75	-
Young Roots	3.22	3.47	4.44	3.59	2.54

\*figures exclude withdrawn projects

#### Success rates by programme in Strategic Framework 4

Programme	SF4 (to date)
Catalyst Umbrella Grants	50%
Catalyst: Endowments	46%
Catalyst: Small Grants	89%
Collecting Cultures	41%
First World War:Then and Now	79%
Grants for Places of Worship	50%
Heritage Endowments	38%
Heritage Enterprise	35%
Heritage Grants under £2m	40%
Heritage Grants £2-5 m	36%
Heritage Grants Major	41%
Kick the Dust	18%
Landscape Partnership	50%
Our Heritage	50%
Parks for People	57%
Resilient Heritage Over10k	60%
Resilient Heritage Under10k	66%
Sharing Heritage	57%
Skills for the Future	27%
Start Up Grants	56%
Townscape Heritage Initiative	42%
Transition Funding	68%
Young Roots	64%

Note: Grants to commemorate the First World War have also been made under several programmes not only First World War: Then and Now. Great Place Scheme projects have been included within the Heritage Grants programme figures and Stories Stones and Bones projects within the Sharing Heritage programme figures.