



National Lottery Heritage Grants

£10,000 – £250,000

Helping you apply

The National Lottery Heritage Fund [Who we are and what we do](#) film



Our strategy Heritage 2033 sets out our long-term vision for investing around £3.6 billion pounds on heritage in the UK. It would be a really good idea to read our strategy – it only takes about 10 minutes to read, has some inspiring photographs and gives you a really clear idea about what we want to achieve.

[Heritage 2033 – our 10-year strategy | The National Lottery Heritage Fund](#)



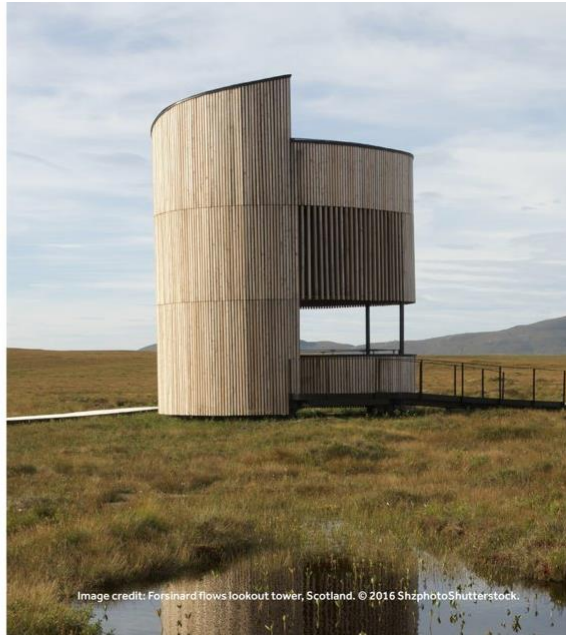
We have designed this workshop for organisations with a heritage project in mind and a broad idea of what they are planning to deliver. It does not matter if you have submitted a Project Enquiry Form or not received advice from us directly yet – just that you can bear your project vision in mind as we go through the session.

- What is your idea?
- What is the heritage you are working with?
- What are you planning to deliver as part of your project?

We hope that today's session will help you think about how you will put your ideas together into a good quality application. Once you press submit, your application will come into your local Area or Country team for assessment and decision.

Who do we fund?

- not-for-profit organisations
- private owners of a heritage asset
- partnerships



You might be keen to know WHO we fund – under this programme, we accept applications from:

- **Not-for-profit organisations** such as charities, trusts, community or voluntary groups, CIO's (charitable incorporated organisations), CIC's (community interest companies), parish councils, town councils, local authorities and other public sector organisations.
- **Private owners** of a heritage asset (for example, a building, land, object or collection) where public benefit can demonstrably outweigh any private gain.
- And **partnerships**. We class a partner as another organisation or third-party body that is integral to the delivery of your project.

Organisations need to have a bank account, a governing document with clear, non-profit distribution rules, and two or more members that are not related or living at the same address.

If after reading the guidance online you remain unsure about your eligibility, please [contact your local team](#) who can review your documentation.



The projects we fund:

- connect **people** and **communities** to the UK's heritage
- take into account all **four** of our **investment principles**



We fund projects connecting people with the UK's Heritage. Projects that value, care for and sustain heritage for everyone across the UK, now and in the future.

- Importantly we don't define heritage – we see it as anything from the past that you value and want to pass on to future generations.
- We support a wide range of heritage from museums, libraries and archives; to historic buildings; to nature and habitats; from our industrial legacy; to cultural traditions, stories and memories; celebrations and more...
- Heritage can mean different things to different people, but Heritage is about what is important to you!

If you are struggling to fully understand or explain your heritage - either the heritage itself or the importance of it to your community - there is a great page on our website which offers some hints, tips and questions to help you more fully understand your heritage. Please have a look and share it with the people involved in your project!

It is also useful to know now that **WE CANNOT FUND** so

- any works that would be considered your organisation's statutory responsibility;
- we can't cover existing costs or any activity that has taken place before the grant is awarded
- OR fund a project that promotes the cause or beliefs of political or faith organisations.
- We also can't fund artificial grass

And projects must take into account ALL FOUR investment principles.

[National Lottery Heritage Grants £10,000 to £250,000 | The National Lottery Heritage Fund](#) If after reading the guidance online headed 'Who can Apply' & 'Governing Document' you remain unsure about eligibility, please contact your local team who can review your documentation

[What we fund | The National Lottery Heritage Fund](#) describes the breadth of heritage we fund and includes a lovely introductory film.

[Understanding your heritage | The National Lottery Heritage Fund](#) offers some hints, tips and questions to help you more fully understand your heritage



no deadlines to apply



decision in 8 weeks

projects that last up to 5 years



partnership funding



optional project enquiry service

Payment terms:

50% in advance

30% in advance

20% in arrears

- There is no deadline, so you can apply whenever you are ready. Please apply when your application is at its best, and don't rush!
- Decisions are made locally, and it takes about 8 weeks to hear back from us once an application has passed checks.
- Projects can last up to 5 years. Projects will need to have a clear plan, with a defined start, middle and end and its duration appropriate to your heritage, what you plan to deliver and the people taking part. For example, nature focused projects may need to be seasonal and so longer than average OR a project working with under-served communities may need more time to embed partnerships and build trust with participants.
- Awarded projects will get 50% of the grant in advance - once you have spent (and evidenced) the first half of your total eligible project costs, we will give you the next 30% in advance and we will pay the final 20% of your grant when you have finished your project and sent us a final completion report, evidencing the last 50% of spend and your project evaluation. It is useful to explain how you will cashflow your project with this payment schedule in mind.
- Partnership funding-wise - we do ask who else you have approached for funding. For this reason, we recommend that you consider whether other funders, organisations, or people might be able to support your project. This could be cash or non-cash support. Describing support of this kind helps show us that there is an interest in and commitment to your project.
- If you have no match, you should still explain why you are unable to raise funds or non-cash contributions from your own resources or other sources. We understand match is not always possible. While we can fund total project costs you may need to consider how you will cash flow the project – especially that 20% retention.

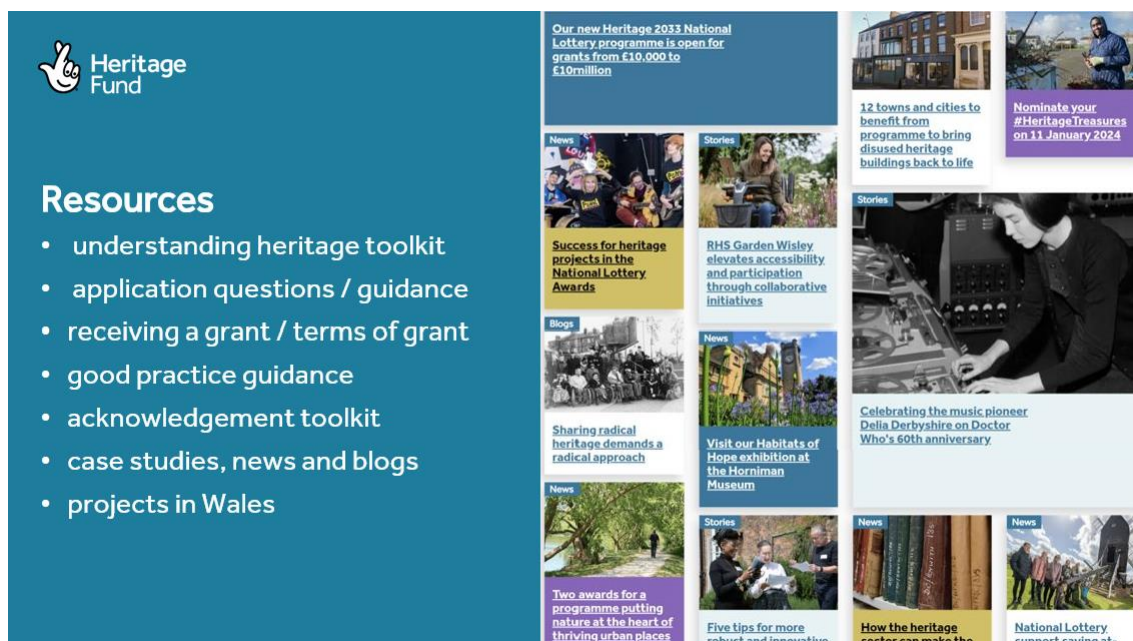
- If you haven't done so yet - you can use our optional Project Enquiry service to get feedback on your project idea.

Project Enquiry: £10,000 to £250,000 | The National Lottery Heritage Fund



Once you submit your application, our checks team will look to see you have attached the **mandatory** supporting documents, and that they meet our requirements.

After you have passed the initial checks stage, we THEN *aim* to give you a decision in eight weeks. In this time our Investment Managers will begin assessing your application, reviewing all the supporting material and putting together your 'case for funding' to present to decision makers. Occasionally due to high demand or other reasons it may take longer – if this were the case you would be informed.



There are lots of useful resources available to help you develop your project and apply for our funding:

- Support from staff, using our project enquiry service and this webinar.
- We have spoken about our programme guidance already which outlines the funding criteria and described our Understanding Heritage feature.
- And our website is a goldmine of resources to help you.
- There are of course the application questions to use as you draft your bid.
- Other essential reading includes the Receiving a Grant and Terms of Grant documents, as this sets out what will happen if your grant is awarded and the terms you will need to follow. For example, the Terms of Grant explains the social and ethical standards we would expect, how long the terms of grant will last and even how long you need to keep the paperwork! As the government can audit us or your project up to 7 years after the project ends. Reading them is more boring than planning the project BUT they are relatively short and contain vital information.
- We also have good practice guidance available on our website where you will find help on topics such as Inclusion, Digital, environmental sustainability, organisational resilience etc. some are heritage-specific...Landscape, seas and nature as well as intangible cultural heritage; some activity-specific such as oral histories or interpretation. So it is worth checking if there is something there that might be useful.
- We do ask you to acknowledge our grants and there is again a toolkit online bringing together ideas, templates, logos and guidance on what you might be able to do – proportionate to the grant size.

- You can find examples of other projects we have funded in the In Your Area section of our website or less local to you in the News and Stories features. We would also recommend speaking to other groups and organisations that have previously received funding from us as they may be able to offer advice and support – they might be able to offer insight into what went well for them and what didn't work so well to help inform your project.
- If you are delivering a project in Wales, you must include the Welsh language in all aspects of your work. We ask that you plan and budget for a bilingual project and you will find more information on our website.
- We know that some people may need additional support to access our materials and complete our application process. Examples of the different types of assistance we can provide and how to request additional support can be found, again, on our website.

So please do take some time to consider these resources as they will provide you with all the information you need to submit a strong application.

[Project Enquiry: £10,000 to £250,000 | The National Lottery Heritage Fund](#)

[Understanding your heritage | The National Lottery Heritage Fund](#)

[National Lottery Heritage Grants £10,000 to £250,000 | The National Lottery Heritage Fund](#) Sections 1-5

[Good practice guidance | The National Lottery Heritage Fund](#)

[Acknowledging and celebrating your grant | The National Lottery Heritage Fund](#)

[In your area | The National Lottery Heritage Fund](#)

[Welsh bilingual project good practice guidance | The National Lottery Heritage Fund](#)

[Reasonable adjustments | The National Lottery Heritage Fund](#)

Our investment principles



Applications to National Lottery Heritage Grants will be rooted in these four investment principles: Saving heritage; Protecting the environment; Inclusion, Access and Participation; and Organisational sustainability. It is these principles that will guide all our decision making. You need to take all four into account, but the strength, focus and emphasis on each principle is for you to decide and demonstrate in your application.

We want these principles to enable you to apply for what you really need but set in the context of what makes a good project and application to us - allowing us to understand the strengths and potential of your project.

We see these Investment Principles as four interlinked elements which work together as the building blocks for strong heritage projects. Hopefully this diagram can stick in your mind and help to illustrate how you may be able to respond to each of the four areas in an application to us. It can also help to illustrate where your project's strength lies, possibly putting greater emphasis on one or two principles.

[Investment principles | The National Lottery Heritage Fund](#)



**Saving
heritage**

**Conserving and valuing
heritage, for now and
the future.**

This one is all about conserving the heritage that we are working with – enabling people to value it, understand it, fix it, share it, DO IT even, in the case of traditional skills or dance.



**Protecting the
environment**

**Supporting nature recovery
and environmental
sustainability.**

If your project's focus is Landscapes, Nature or Parks, you might place extra emphasis on our protecting the environment investment principle in your application.



Strengthening heritage to be adaptive and financially resilient, contributing to communities and economies.

If you are developing an organisational sustainability focussed project, tasks such as business planning or viability appraisals could take up the majority of your project focus

OR you may have tasks that may also be tied into environmental measures which overtime reduce costs or focus on reaching new audiences (your project then might have tasks aligned to two principles).



Supporting greater inclusion, diversity, access and participation in heritage.

And finally - do you have an inclusion or access driver within your project? Or have plans for participatory activities? If so, you are likely to have strengths aligning with this principle.

The important thing to remember is that we are still looking for good projects, with a clear ambition, based on consultation, well-rounded across these areas, with good management plans in place. The application form is designed to draw out all this information.

Proportionality is considered – the more money you are requesting the more details and information we will be seeking from you.

Saving heritage

Conserving and valuing heritage for now and the future.

Why? To ensure heritage remains accessible, relevant, sustainable and valued.

How? Commit funding to protect, conserve and revitalise heritage.

Image credit: Hyde Park Picture House / Ollie Jenkins



Our first investment principle is Saving Heritage – we want to support projects that conserve and value heritage for now and the future. We want our support to enable heritage to remain accessible, relevant, sustainable and valued.

Through all our programmes and initiatives, we will commit funding to protect, conserve and revitalise heritage at risk. By heritage at risk, we mean heritage of all kinds that is in poor condition or at risk of loss, decline, damage, neglect or simply of being forgotten to ensure it is valued and better understood (so not just listed things!)

There is a place-based element to this principle and so if any projects do have a place making ambition, please have a word with your local team.

Our assessors will be looking to see if your plans are realistic, achievable and appropriate for the project, the heritage and your organisation. Show us that you clearly understand what you are doing to Save Heritage and the impact your project can make.

But it is up to you to tell us what you want to do and why – and to explain that your project will be of high quality. This could be telling us that any conservation work will be professionally delivered, or memories will be collected by trained individuals.

Saving heritage

Title: Save our Steamship

Award: £130,000

Organisation: Steamship Sir Walter Scott Trust

Area/Country: Scotland

Vision: This project will carry out essential repairs to the Sir Walter Scott Steamer. Once restored she will explore the heritage of Loch Katrine and the Trossachs. The Trust will create an inclusive exhibition onboard which will include visual and audio elements.

Achievements:

- full repair enables steamship to operate
- conservation training placements
- greener fuel transition
- accessible exhibition
- partnerships developed with specialist access and training providers



These case studies are real projects from across the UK, as chosen by the team delivering today. This pie chart hopefully demonstrates that the balance and focus is up to you – if we illustrated how this project took our investment principles into account, it would look like this.

This is one of our projects in Scotland and you can see from the Trust's vision statement that they wanted to bring their Steamship back to life. We have pulled together some of the things that we think are great achievements:

- Much of the work was necessary repairs to the deck to ensure that the ship was fully operational again. The project provided four fully funded training work placements over the course of the project in partnership with Stirling Community Enterprise and Stirling Council. These opportunities offered hands-on experience of traditional skills required to maintain the ship or related industries. And the four placements reached employment! (Hence the larger orange Saving Heritage part of the pie chart).
- Boilers were replaced with more efficient, greener fuel ones to reduce the ship's carbon emissions. (a good bit of Protecting the environment seen in green there given their loch-dwelling heritage asset)
- Collaboration with organisations that support and advocate for people with disabilities ensured that the Sir Walter Scott Steamer itself could cater for a range of access needs and ensure that interpretation onboard was inclusive. (Inclusion, Access and Participation in pink)
- Organisational sustainability wasn't the main focus of their project so there is a smaller purple section, HOWEVER they were able to highlight how an operational steamer would increase visitors, engagement and income, and two placements moved on to become full-time employees, all of which added to the organisation's sustainability.

Protecting the environment

Supporting nature recovery and environmental sustainability.

Why?

To help the UK meet its nature recovery target and mitigate the impact of climate change.

How?

Support natural heritage and environmentally sustainable projects.

Image credit: Back from the Brink / Neil Aldridge



Our next principle is Protecting the Environment and again this principle must be taken into account in all projects that come to us.

We want to support heritage projects that reduce adverse environmental impacts and help heritage to adapt to our changing climate.

It is probably useful to consider this principle with two different hats on – one from a nature and landscape perspective and one from an environmental footprint perspective. Some projects may be doing both.

Nature and Landscape focused projects will see us support projects – both rural and urban – that help habitats and species thrive, reducing and mitigating the impacts of climate change, while helping people connect to our unique natural heritage. We aim to put landscapes and habitats into recovery, so they support abundant natural heritage and healthy natural systems. And of course, we want to better support people's understanding and connection with nature across towns, cities, and the countryside.

Swapping hats to other heritage sectors, this Investment principle could mean measures to reduce any negative environmental impact and your organisations carbon footprint. If projects involve construction, we will encourage restoration, conservation, and reuse, rather than new build.

As before we will be looking to see if your project's plans are realistic, achievable and appropriate for the project, the heritage and your organisation. Show us that you clearly understand what you are doing to Protect the Environment and the impact your project can make.

We will look at your project in relation to your vision and proportionally to the size of grant you are requesting. A £10k project may simply be using local suppliers, public transport or something simple. If you are requesting a larger grant amount, we might expect you to be thinking about larger measures or joining the 'fit for future network'

That network and other ideas are described in our good practice guidance.

[Environmental sustainability good practice guidance | The National Lottery Heritage Fund](#)

Inclusion, access and participation

Support greater inclusion, diversity, access and

Why?

To ensure everyone has opportunities to learn, develop new skills and explore heritage.

How?

Investing in volunteering, heritage careers, co-creating projects, leadership, governance and heritage skills.

Image credit: Big City Butterfly / Chris O'Donovan



All of our investment principles apply to both a wide range of heritage and activity, and this one is no exception. Be sure to tell us about the things that are specific to the project, so we know it is a defined project rather than your day-to-day business.

We want to involve a more diverse range of people in heritage; see investment in volunteering; more heritage careers; communities co-creating projects; inspiring leadership; strong governance...all sorts of people-driven projects which develop knowledge and skills.

We want to enable organisations to remove barriers to access and participation, particularly for people who are under-served by heritage. This may include creating digital heritage resources to make heritage more accessible and enjoyable and promote better access to heritage information, enabling projects to increase impact and reach

The vast majority of our projects (by number) enable communities to explore and share their heritage, enrich lives and enable everyone's heritage to be recognised.

As before we will be looking for projects that are engaging, appropriate, professionally supported and fit well with the project ambition. It might be useful to tell us if you think your project outputs will be sustainable – will access improvements be permanent? Might a particular activity be able to be delivered by staff in future? Would an exhibition tour local libraries?

Inclusion, access and participation

Title: An Tobar & Brian's Wood Native Woodland Project

Award: £61,900

Organisation: An Tobar CIC

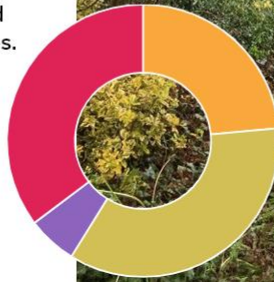
Area/Country: Northern Ireland

(National Lottery Project of the Year 2022)

Vision: Enhancing Brian's Wood and improving people's access to and knowledge of natural heritage. We plan to install accessible pathways, railings, seating areas and interpretation as well as native Tree-planting activities.

Achievements:

- 450+ local primary pupils welcomed
- nature and cultural heritage workshops designed for under-served groups
- trails and outdoor classrooms for year-round activities
- skills in delivering online heritage workshops



Another Case Study here, which on the face of it sounds like a nature project, with habitat enhancements alongside tree planting – seeing a good proportion of the project Protecting the Environment – with the green segment representing that activity.

But we felt that the core of this project was its people centered approach – being inclusive, making access improvements and using its participatory activities to connect people to nature. Represented by the pink segment

- They welcomed over 450 local primary school children to the native woodland located on a 40-acre farm.
- Activities reached women aged 55+, carers of dependents with disability/illness, families with lower socio-economic backgrounds with additional needs and/or physical disability all underserved by natural heritage.
- Some of these activities were nature based, others were cultural heritage-based activities such as poetry trails, nature trails and outdoor classrooms in the new seating areas.
- Whilst not focussing on organisational sustainability it was clear that year-round activities and staff developmental skills to deliver online heritage workshops would be beneficial in that area.
- Also, although Saving heritage was not the key focus, by improving access, visitor experiences and enhancing the site they have taken this into account by increasing understanding and valuing heritage.

Organisational sustainability

Strengthening heritage to be adaptive and financially resilient, contributing to communities and economies.

Why?

To develop skills and capacity leading to a sound long term future that benefits communities and economies.

How?

Providing organisations with capacity and expertise to develop their long-term organisational governance and leadership **plans**.

And our last principle – Organisational Sustainability.

This can mean different things to different organisations at different points in their journey. We want to support organisations to develop skills and capacity to ensure a sound long term future and encourage heritage investment that benefits communities and economies.

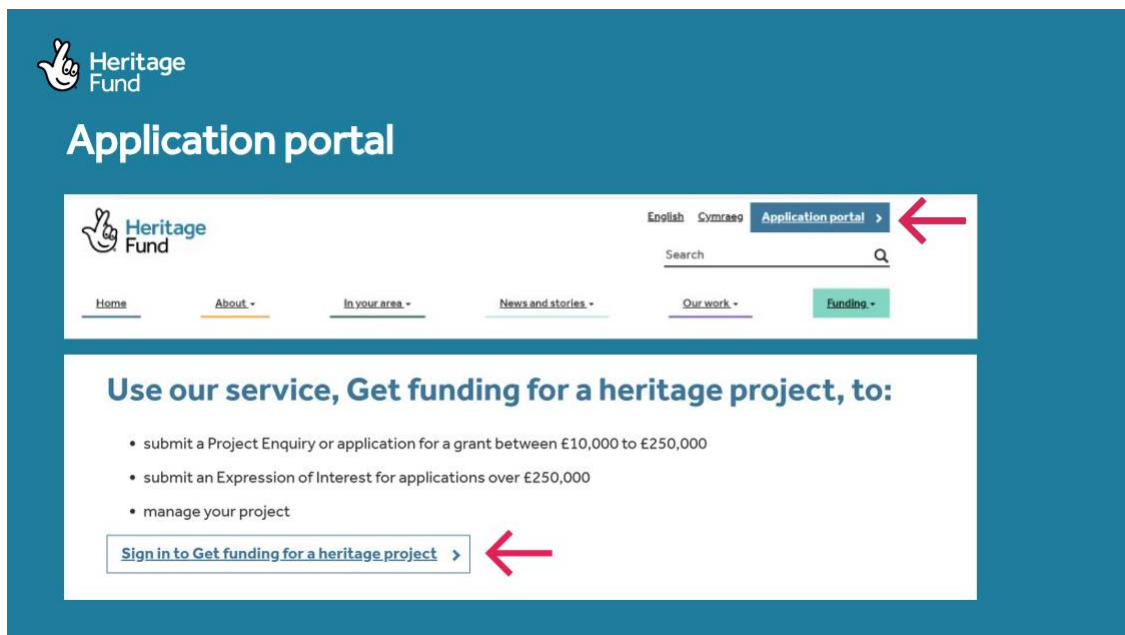
This could be through supporting organisations to increase their financial and organisational sustainability by developing commercial skills and digital skills and strengthening governance and leadership. It is up to you here to make the case for what you need.

We will be looking for your project to support your organisational journey, needs and future plans. So please be realistic about your needs and describe these elements as best you can.

If this is the focus of your project, you may find some of the good practice resources and our business support and enterprise hub useful.

[Business Support and Enterprise Development | The National Lottery Heritage Fund](#)

[Organisational sustainability and resilience good practice guidance | The National Lottery Heritage Fund](#)



Firstly, you will need to register for the application portal (if you haven't done so already through the Project Enquiry process or a previous application). You can see the 'Application Portal' button on the top right of every page on our website. Then follow the 'Get funding for a heritage project' instruction.

You'll need to register your organisation with an email and password. Please use your organisations legal name as stated on your governing document AND use an email address and password that other people in your organisation can be privy to as there is only one login for each organisation. When you first register there are quite a few questions related to your organisation, these require relatively short fact-based answers. Once these are in you won't have to repeat them again – unless you need to update them.

We recommend that you gather as much information as possible before starting your application so that you have everything you need ready to go. You can have a look at all the questions by looking at the summary application questions page on the website.

[National Lottery Heritage Grants £10,000 to £250,000 Application Questions | The National Lottery Heritage Fund](#)



Heritage
Fund

Portal view

About your heritage focus

**Tell us about the heritage
you will focus on as part of
this project**

Related link

[See all questions and your
answers](#)

You have 500 words remaining

Save and continue

Our portal should look familiar as it is based on the Government Gateway model and is relatively intuitive to use. It has one question per page with either text boxes or select an option button. You can see how many words you have remaining to use, can save as you go along and have an option to see the overview of your questions and answers completed thus far.

The next few slides look at the questions where we are expecting detailed information about your project, your answers for these will help our Investment Managers (who assess the application) to understand your project and what the grant will fund.



The application form starts by asking for your project's vision. "Describe what your organisation would like to achieve through your project". You need to be ready to answer this relatively succinctly as you have 150 words here.

We start with this for good reason – as this is the chance for us to get not only an overview but get excited with you as to what you plan to achieve, feel your motivation and that this is the right project at the right time for your organisation.

This answer is seen by our decision makers too. So, it just shows how important it is. Think of your application form as telling us a story, it should flow and be connected. All the information you provide in the other questions and supporting documents should detail your vision and help us understand that your project is appropriate, realistic and practical.

So, in this section tell us what you hope to achieve and what you hope the legacy of your project will be.



About your heritage focus

Question: Tell us about the heritage you will focus on as part of this project.

Consider: Why is it important?
Who is it important to?

Next question: Is the heritage at risk?



We are The Heritage Fund, and we want to fund projects that connect people and communities to heritage. So, this is an important question... “Tell us about the heritage you will focus on as part of this project” and you have 500 words to do so.

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

Provide factual information about the heritage. For example:

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

Tell us:

If there is any official recognition of this heritage. For example, it may be a listed building (if so, give its grade) or a Site of Special Scientific Interest.

- What is important about the heritage? for example, it may be a source of artistic, architectural or scientific interest.
- Who the heritage is important to? This could include experts and/or the local community.
- Why is the heritage distinct or unique? What is special about it?
- How does it relate to other heritage? in the local area perhaps, or nationally?

You don't need to describe anything other than your heritage here. The rest of the questions aim to get the remainder of the information about your project that we need as each question builds on the prior one.

For example: The next question asks if your heritage is At Risk or is under-threat in some way. Here you can select yes or no. If yes, another text box for 500 words

appears, and so you should have sufficient word count to describe both what your heritage is AND if it faces any threats, within the wordcounts for each specific question.



About your project

Question: Have you received any advice from us about the project?

Question: Have you received any advice from anyone else about this project?

About the need for your project

Question: Why does your project need to happen?

Consider: Why is your project important?

The project section in the form begins with a set of short, factual questions, project title, start and end date and location. However, within this section, and the following section on need and demand, there are some good questions that will help you show us why we really should fund your project.

When you are thinking about your project it is important to consider as early as possible: what will make your project stand out to decision makers, what makes it feel special to you, why should we fund your project, what needs does it address? Or opportunities does it offer? And why is NOW the right time for your project to happen?

Questions such as: "Have you received any advice from anyone else about this project?" (500 words) can demonstrate any consultation you have done with your local community and those who will be involved in your project, so we know you are doing something that is really needed. And similarly, any specialist advice you have received, so we know your project is appropriate and well-planned. We would encourage you to talk to people outside of your organisation during your project planning process.

We also ask "why does your project need to happen?" You can use up to 500 words to build upon the advice and consultation answer to explain what need and opportunity your project is addressing. Describe who else wants it to happen and what differences it will make. There might be a particular opportunity you are responding to like an anniversary, a wider strategy being launched, another project happening in your area or even the availability of other funding.

To answer this well you should be thinking about:

- Why your project is important to your local **community** and why they want this to happen
- Are there any **key dates** or anniversaries that your project hopes to celebrate?

- Conversations and **consultation** you've had with other people, organisations, partners and relevant agencies to show how your project supports local strategies
- Are there specific **barriers** to people engaging with your heritage? And opportunities to remove them?
- **Funding** availability (or lack of it) may be a need/opportunity as perhaps it won't be available in the future



So, you have established your vision, heritage focus and need and demand – so what do you plan to do?

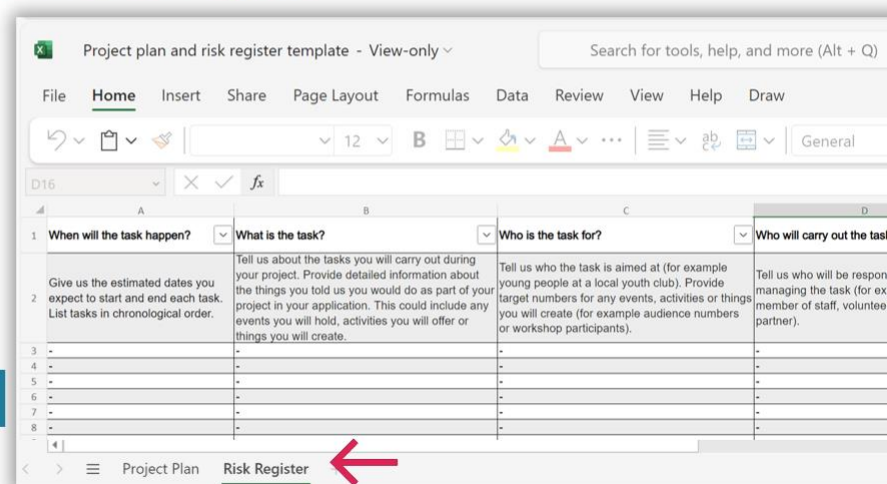
In the application form we then ask, “Tell us what you will do during your project”. There are only 500 words for the answer, so just enough to explain the main tasks that you are planning. Please provide an overview, describing any:

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

This overview helps us to understand what your project is all about. The assessors will then look to your Project Plan to review the more detailed information about each element of your project.

Project plan and Risk register

- Who?
- What?
- When?
- Where?
- Why?
- How Much?



Your Project plan is a vital supporting document. You should include every aspect of your project in as much detail as you can. Be as specific as you can including names and numbers where possible.

It should include the 'who,' 'what,' 'where' information. But this is YOUR document, so there may be additional information that you need to provide. The Project Plan doesn't have to be in Excel, but it MUST have this information in.

Don't forget that there is a second tab in this template (as indicated by the red arrow on the slide).

The second tab demonstrates what information we need for your project's Risk Register. We know that all projects face challenges and risks. Tell us about the challenges or risks you have identified, which could have an impact on your project and explain how you will manage these. We expect to see contingency within your project costs to help manage challenges or risks you identified.

This is a useful document as you can keep using it whilst you deliver your project.

[Project plan and risk register template | The National Lottery Heritage Fund](#)



We have tried to flesh out a common project task.

So, we could say - in May we are going to recruit a project manager, the task is for the organisation and the project, so we have the best person in the role. The recruiting managers will be our Exhibitions curator and a member of the project board as they have skills in recruitment. We are going to do this at our head office so that we can demonstrate what our workspace is like and introduce colleagues. We expect to reimburse travel costs for 10 candidates and have an allowance for access and refreshments.

This tells us more than 'May', 'Recruitment', 'Us', 'a Manager', 'Our office' which are weaker answers overall.

So again, thinking in this way:

Over summer we will showcase our project findings in an exhibition of photos, ephemera and memories. The exhibition is for participants to celebrate their work AND for invited interest groups and passing audiences. It will be at the community centre, and so on.

Our assessors want to see information to illuminate each project task – admin, governance, evaluation, induction, training, everything! So, they can understand and feel confident in what you are planning to deliver.

A cost column is included to help you to build your budget; to make sure you have not forgotten anything; and to back up the information in your cost table so we know why you need the grant.

The project plan, project vision, and budget are key parts of the application, so they should mirror each other and flow well.

Please work on this document at the same time as your application. Don't leave it until the last minute! Some people prefer to write these two first as it can really help you complete the rest of the application form.



Capital works

Question: Will capital works be part of your project?

Consider: ownership and permissions
any legal requirements
condition surveys

Consider: digital assets

Image credits: TBC



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

With a simple yes/no feature, projects that have no capital work involved get to skip a few questions. Those of you who are undertaking capital works will get the kind of questions you are no doubt expecting.

We will need to understand ownership, if any permissions are required; for example, are there any legal aspects we need to know about? Also, it is useful for us to understand the condition of the asset you are working with, if you are doing any conservation work. You have up to 500 words to tell us about these aspects, and you can upload any evidence you have as supporting documents, such as a Condition Survey.

You are likely to be expecting these questions if you are repairing a building or doing some habitat improvements, but you might not be expecting to click YES if you want to create a website or an app as part of your project. But in this sense, you are creating an asset, and we see this as a capital element in your project.



Digital works

Question: Will you be creating any digital works as part of your project?

Consider: Available
Open
Accessible



Image credits: The Story, Durham County Council and Digital Heroes, Heritage Trust N

Digital works are things you create in a digital format which are designed to give access to heritage. They could also help people engage with and learn about heritage. For example, a collection of digital images or sound files, an online heritage resource or exhibition or a smartphone app.

Anything you create in a digital format will need to meet our digital requirements, including ensuring that the digital outputs you create with grant funding are available, open and accessible. You can read more about our digital requirements, good practice and examples on our website. Please read this information thoroughly and share this with anyone who is helping you to create your digital assets.

In this capital activity section of the form please also answer YES even if you are only doing a little bit of capital activity. This is so that assessors do have all the information they need.

[Digital good practice guidance | The National Lottery Heritage Fund](#)



Text boxes for the four investment principles precede these project management questions. 500 words for each principle.

There is a question too on Subsidy Control. We consider it less likely in grants of this size BUT if in doubt please seek professional advice.


In the 'delivering your project' section of the form we are looking for you to demonstrate that your organisation should run this project, with partners if useful, that you have robust management plans, risk mitigation and evaluation plans. Your Application, Project Plan and Risk Register will all help us understand how you plan to manage your project.

What we are wanting to know is:

- Are the people involved in your project experienced? Have they run projects like this before? If not, have you built in the relevant professional support? Are the Project Management plans logical, timetabled, and overall are they realistic?
- Do you have the right support? This could be project partners or other community networks. Have you spoken to similar projects to inform your bid?
- Budget-wise, are you asking for an amount of money you can manage? What do your accounts tell us? Is your partnership fundraising realistic?
- Can you cash flow the project?
- AND is evaluation planned in this project (answer yes - it is a requirement. And we expect to see costs for this in your budget)

To note in this section of the form – this is where we ask if any of your project is happening in Wales. If so, we want to understand how you will use the Welsh Language in your project, and we will be looking to see if translation is planned and costed.

[Subsidy control | The National Lottery Heritage Fund](#)



Cost Table (portal view)

Add a cost

You will need to add a new cost for each separate project cost.

For example, if you are recruiting three new staff members to manage your project, you will need to add three different new staff costs. Each cost will need to have its own description and amount.

Cost type

New staff

Description of cost

You have 50 words remaining

Amount

£

VAT Amount

£

[Add this cost](#)

Cost type

New staff

New staff

Professional fees

Recruitment

Purchase price of heritage items

Repair and conservation work

Event costs

Digital outputs

Equipment and materials including learning materials

Training for staff

Training for volunteers

Travel for staff

Travel for volunteers

Expenses for staff

Expenses for volunteers

Other

Publicity and promotion

Evaluation

Contingency

Your project costs do need to be fully worked up at the point of application as we cannot offer you more money once awarded if you have got your costs wrong. So you will need to work off realistic estimates or quotations.

Our procurement good practice guide explains that, once awarded, we would want to see 3 quotes for any goods, works or services over £10,000. Under that, it is up to you, but you should still consider ways to demonstrate good value for money in any cost tabled.

The cost table is organised using a drop-down list to select a cost heading. If you have plans to recruit a staff member and two consultants, you would add 1 new staff line and 2 professional fees lines to your cost table. There is a description field which helps you explain what the cost is for and how it relates to your heritage and project.

Remember the cost table is seen by assessors and decision makers so well explained cost descriptions are very useful.

[Procurement good practice guidance | The National Lottery Heritage Fund](#)

Project costs

Drop down lists

Description field

Cash and non-cash

Evaluation

Acknowledgement

Contingency

How much will your project cost?	Cost type	description	Amount
	Purchase price of heritage items	buying some history	£55
	New staff	volunteer coordinator	£55
	Contingency	contingency	£50

Are you getting any cash contributions towards your project?	description	Secured	Amount
	Local Authority support	Yes, no evidence yet	£200

Are you getting any non-cash contributions towards your project?	description	Amount
	volunteer time	£5,000
	Total	£5,000

Volunteers	description	Hours

There are separate tables to help you record your cash and noncash contributions to the project – again with drop downs and description fields. Please note that this form is not automated, so please do check the final figure you are requesting before submitting.

We expect to see a cost for evaluating your project – so please do include costs – the amount will depend on the complexity of your project or if you are paying a professional to deliver the evaluation aspect. There will be a cost even with in house evaluation so please include one.

We also expect to see costs for acknowledging you project under the ‘publicity and promotion’ heading.

So too contingency – we expect to see this, especially in the current climate. Contingency budget will be held there for IF or WHEN you need to use it and you will request to draw down against that budget heading.

Overall, we look at everything in the application, your project vision, how it will be delivered, and how much it costs and consider value for money.



Supporting documents

Mandatory:

- governing document
- accounts
- project plan and risk
- costs for evaluation, contingency and acknowledging your award

If applicable:

- job descriptions
- briefs for commissioned
- full cost recovery calculation
- images (max six)
- evidence of support (max six)
- ownership documents
- condition survey
- partnership agreement
- evidence of cash contributions

At the end of the application form you will see a list of Supporting Documents. Some say 'MUST' and are mandatory, some say IF applicable. Meaning, you need to identify which you are required to upload.

The form will ask you to upload each in turn.

Your governing document, accounts and Project Plan, are mandatory:

Your governing document should include the following:

- the legal 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 governing document does not include the above. And please make sure your project clearly falls within the objects of your organisation.

We do not need to see your governing document if:

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

We ask you to 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.

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

Top tip from our application checks team – make sure you use your full legal name and that this is the same in your application, governing document and accounts.

Your project plan and risk register, as we know, will be a logical explanation of all the things you will do to deliver your project and how you will manage risks. Please use the template on our website for this.

It is highly likely that you would need a job description or briefs as there will be people carrying out tasks during your project and so do bear that in mind – this is the most consistently forgotten supporting document.

It is also highly likely that you would have evidence of support given the consultation we have advised.

So, in short – remember to upload ALL the required supporting documents. If you don't submit all of the mandatory documents (governance document, the accounts and project plan), our checks team will contact you.

Additional time taken here will delay the assessment of your application as it cannot be passed from checks to assessment teams. Please make sure you check if you need to submit any other documents like job descriptions, briefs or a partnership agreement.

Top tips

- 1 all four investment principles have been considered
- 2 evidence for need and demand
- 3 supporting documents attached
- 4 use Plain English
- 5 word count – there for a reason
- 6 keep a separate draft
- 7 take regular breaks
- 8 share the load with critical friends

If you only remember 3 things:

1. We hope that we have made it clear that it is essential to take into account all four investment principles and that you now feel confident in doing so.
2. Please evidence the need and demand for your project – in the form itself, your project plan, supporting evidence – anywhere you can sing about it.
3. And please remember If you don't submit all the mandatory supporting documents, we will have to ask you for them, and this can take extra time and delay your decision. So please make sure you have submitted all that are relevant to your project

And more generally speaking:

Try to write clearly and don't use jargon. There are so many different topics within heritage that your project can focus on. Try to be as clear and straightforward as you can when describing what your project is about and how you are going to deliver it.

Our application forms do have word counts for questions. The word count is also a good indication if we expect a longer answer. Make sure that your answers fit within each limit.

It is a good idea to keep a separate copy of your application answers, such as in a Word document, as a back-up for all your answers, then copy and paste them directly into the online application form.

And finally – writing an application takes time and patience. Take breaks and come back to it with fresh eyes and get other people who will be involved in the project to help you. A critical friend, or someone who isn't involved in the project at all, may also be able to give you feedback on what you have written from an outsider's perspective.

Next steps

- evaluation form
- support pack
- online resources
- application form

Image credit: TBC



And finally - the next steps:

Remember to browse around and explore the resources and guidance on our website that we have signposted to, and before submitting your application, check back to the information to finish developing your project idea.

Perhaps [sign up to our newsletter](#) to keep up to date.