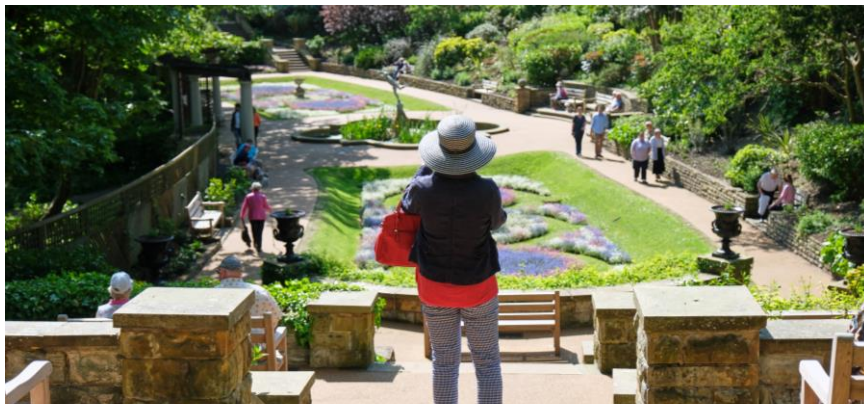


# BHP Charities Conference November 2024



L-R: Holgate Windmill, York. The Awakening Leeds 2023, JMA Photography. Tees-Swale Naturally Connected. First Light Pavillon, Andrew Brooks. South Cliff Gardens, Tony Bartholomew. South Asia Gallery, Manchester Museum. Restored Spurn Lightship at Hull Marina, Hull Maritime

# Contents

- Introduction to Heritage Fund
- Heritage 2033 – Our Strategy
- Our Investment Principles
- Our Approach

# Introduction



**Helen Featherstone**  
Director, England - North



**Louise Clare**  
Senior Engagement Manager, England - North

# Who We Are



# Our 10-year Vision

As the largest funder for the UK's heritage, **our vision is for heritage to be valued, cared for and sustained for everyone, now and in the future.**



# National Lottery 30th Birthday

- 2024 is a landmark year for the National Lottery Heritage Fund, marking our 30th Birthday celebrations
- Since 1994, we have invested over **£8.2billion** of National Lottery funding in more than **46,000 projects** across the UK
- In the North, we have awarded over **£2billion** to more than **12,200 projects** across the region over the last 30 years





# Heritage 2033



# Heritage 2033

- 18 months ago on 2 March 2023 we launched our new and ambitious strategy 10 year strategy: Heritage 2033
- It is an exciting and significant time, setting out our strategic direction for the next 10 years.
- Presenting our vision for the future of the UK's heritage and for what our investment will achieve.
- The strategy is based on widespread public, sector and staff engagement and wider research.



# Heritage 2033

- Since we have launched our new strategy, in the North we have assessed 136 applications
- Awarded 64 grants £10,000 - £250,000
- Awarded 6 projects over £250,000
- The success rate is currently 55% for grants under £250,000
- The success rate is currently 66% for grants over £250,000

# Heritage 2033

## Early indications

- Heritage is central to successful projects
- Projects are being supported when they need our support and not having to invest large amounts upfront to access our funding
- The sector is still struggling considering the financial climate, cost of living crisis and post covid
- Costs are still volatile, although stabilising
- Seeing less applications from non-heritage organisations that focus on community work
- Really strong and exciting projects

# Our Investment Principles

Thanks to  
National Lottery  
players



heritagefund.org.uk  
@HeritageFundUK

### **Saving heritage**

- Improved condition and understanding of heritage
- Reduced amount of 'heritage at risk'
- Delivered transformational long-term projects
- Made digital heritage more accessible

### **Protecting the environment**

- Put landscapes and habitats into recovery
  - Increased understanding of and connection to nature
- Reduced the negative environmental impact of our funding portfolio
- Improved heritage's ability to adapt to climate change

### **Organisational sustainability**

- Increased organisations' commercial and governance capabilities
- Developed skills and capacity across heritage
- Embedded resilience in projects we fund
- Strengthened heritage's contribution to local economies

### **Inclusion, access and participation**

- Increased diversity of heritage workforces and audiences
  - Reduced barriers for people under-served by heritage
- Enabled more people's heritage to be recognised
- Championed digital technology to improve access

**Our investment principles and what we'll achieve by 2033:**

# Our Approach

# Open Funding Programme

## £10,000 - £250,000

- Area or nation decision
- No deadlines to apply
- Decision within 8-weeks
- Last up to 5 years
- Payment terms 50% in advance, 30% in advance and 20% in arrears
- Optional Project Enquiry Service

## £250,000 - £10 million

- Area or nation decision
- Quarterly deadlines
- Decision within 12-weeks
- 2 stage application process: development phase and delivery phase
- Development phase up to 2 years and delivery phase up to 5 years
- Development grants **over £250,000**, and all delivery grants, are made in arrears.
- Under £1m, 5% contribution, Over £1m, 10% contribution
- Mandatory Expression of Interest Form

## SUBMISSION



You submit your application and supporting documents through our application portal.

## CHECKS



Your application is checked to make sure it is complete. You will receive a decision within 8 weeks, once this is confirmed.

## CASE PAPER



Our investment team review your application and write a 'case for funding' based on our funding criteria and the evidence you provide.

## MEETING



This goes to a decision meeting where your project is considered alongside other grant requests, against a limited budget.

## DECISION



The outcome of your application is communicated to you by an Investment manager.



8-week assessment period

# Resources

- Application questions & guidance
- Receiving a grant / terms of grant
- Good practice guidance
- Understanding heritage toolkit
- Acknowledgement toolkit
- Case studies, news and blogs
- Similar projects

[Our new Heritage 2033 National Lottery programme is open for grants from £10,000 to £10million](#)



[Success for heritage projects in the National Lottery Awards](#)



[Sharing radical heritage demands a radical approach](#)



[Two awards for a programme putting nature at the heart of thriving urban places](#)



[RHS Garden Wisley elevates accessibility and participation through collaborative initiatives](#)



[Visit our Habitats of Hope exhibition at the Horniman Museum](#)



[Five tips for more robust and innovative](#)



[12 towns and cities to benefit from programme to bring disused heritage buildings back to life](#)



[Nominate your #HeritageTreasures on 11 January 2024](#)



[Celebrating the music pioneer Delia Derbyshire on Doctor Who's 60th anniversary.](#)



[How the heritage sector can make the](#)



[National Lottery support saving at-](#)



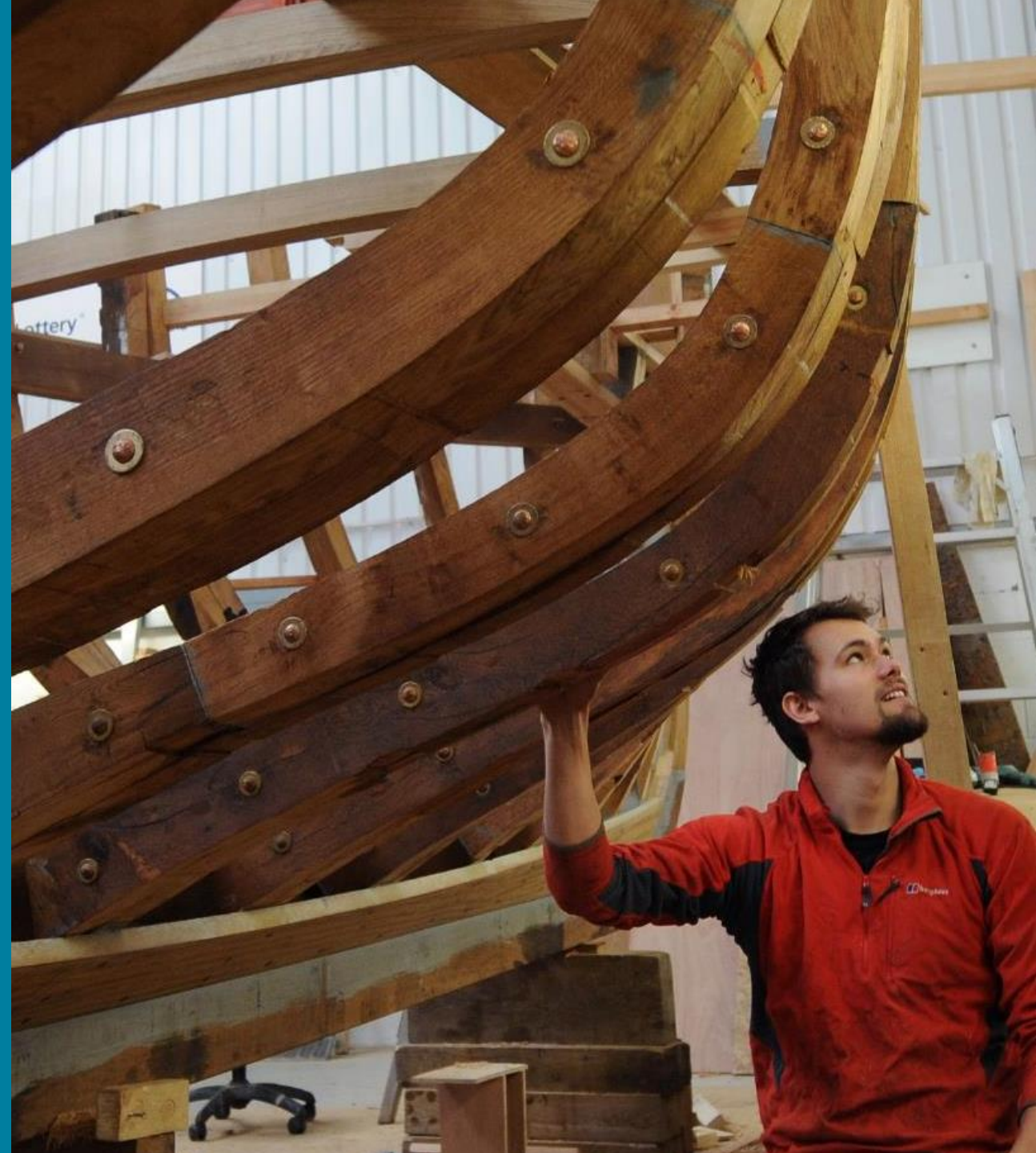
# Need and opportunity

People

Priorities

Place

Potential



# Things to Consider

- Heritage Places
- Double Funding
- Subsidy Control
- Timelines
- Other funding deadlines
- Match Funding
- Cash Flow
- RIBA Stages



# Top Tips

- Vision and need and demand
- Read all the guidance that applies to your project
- Ensure you provide the full set of supporting documents
- Present a coherent and cohesive project
- Risk and risk mitigation
- Mandatory costs for acknowledgement, contingency and evaluation



# Next Steps

