



# Sharing Heritage

Grants from £3,000 to £10,000

## Application guidance



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**Front image:**

Young people learning to play church bells restored with our help. Photo: David Levenson.

# Sharing Heritage

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## Welcome

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Sharing Heritage provides grants of £3,000–£10,000 for small-scale heritage projects. This is the Heritage Lottery Fund’s smallest grant programme, and is suitable for groups who have never applied to us before, as well as more experienced organisations. Our application form is straightforward and we will assess your application in eight weeks.

Under Sharing Heritage, we can fund lots of different types of projects. In the application form, we will ask you what heritage your project focuses on, what activities you will do, and how you will share what you’ve done. You can find out more on p.6 of this guidance.

We describe the difference we want projects to make through a set of outcomes, which you can see on p.7 of this guidance. Your project must achieve at least one of our outcomes for people. In the application form, we will ask you to tell us which of these outcomes you think your project will achieve. The outcome we value most is that ‘people will have learnt about heritage’.

## Quick quiz

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If you answer ‘yes’ to the questions below, then Sharing Heritage could be the right funding programme for your project.

**1) Does your project focus on heritage?**

See p.4 for information about what heritage includes.

**2) Will your project achieve one of our outcomes for people?**

As a minimum, your project needs to achieve one outcome for people. See p.7 and [Appendix 1: Outcomes](#).

**3) Will your project take a year or less to complete?**

Under Sharing Heritage, we fund projects which last no more than a year.

**4) Are you a not-for-profit organisation with a constitution and a bank account?**

Find out more about the organisations we can fund on p.4.

**5) If you are planning to undertake capital work (physical work to a heritage item, building or land) do you own the property?**

Find out more about our ownership requirements in [Appendix 4: Property ownership](#).

**6) Will your project start only once you have received a grant from HLF?**

We cannot give a grant to a project that has already started.

## Heritage

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We fund projects which focus on heritage. Heritage includes many different things from the past that we value and want to pass on to future generations, for example:

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

## Who we fund

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Under this programme, we fund applications from:

- not-for-profit organisations; and
- partnerships led by not-for-profit organisations.

If you are applying as a partnership, you will need to decide which organisation will fill in our application form and receive the grant.

Whoever is involved in an application, it is important that benefits to the public outweigh private gain.

Here are some examples of who we fund:

- charities or trusts;
- community or voluntary groups;
- community/parish councils;
- Community Interest Companies;
- local authorities;
- other public sector organisations, such as nationally funded museums;
- social enterprises.

If you are successful in receiving a grant from us, your organisation will need a bank account.



## What we fund

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Under this programme, we fund projects that:

- make a difference to people, heritage and communities in the UK;
- have not yet started; and
- will last for no more than one year.

The assessment process is competitive and we cannot fund all of the good-quality applications that we receive. As a guide, the following are unlikely to win support:

- projects based outside the UK;
- projects where the main focus is meeting your legal and/or statutory responsibilities, such as the requirements of the Equality Act 2010;
- projects which promote the cause or beliefs of political and faith organisations.

## Points to consider

If your project involves the purchase of heritage items, land, buildings, or property, please refer to **Appendix 5: Buying land and buildings**, and **Appendix 6: Buying heritage items and collections**, as appropriate.

If your project involves undertaking any physical works, such as repair or conservation work to historic buildings, landscapes, archive collections or other heritage items, you will need to provide a condition survey. A condition survey is a short report that will tell us what condition the heritage is currently in, and will help you decide what works are needed.

You will need to supply one if you are planning any conservation work, such as restoring a memorial. If you are awarded a grant, you will need to ensure that you have all the statutory approvals or permissions that you need for your project in place before work starts. For more information, please read section 2.5 'Statutory permissions and licences' in *Sharing Heritage - Receiving a Grant*. You can find this document on our website.

If your project will create anything in a digital format which is designed to give access to heritage, or to help people engage with heritage, please read about digital outputs in **Appendix 3: Digital outputs**.

If your project involves doing physical work such as conservation or new building work, please read about property ownership in **Appendix 4: Property ownership**.

If your project is designed to benefit people in Wales, we expect you to make appropriate use of the Welsh language when you deliver your project.

## What we need to know about your project

We will ask you to tell us what your project will involve under the following headings:

### The heritage your project focuses on

See p.4 of this guidance for examples.

Please tell us about the heritage that your project will explore or conserve.

- If your project is about physical heritage (such as a building, archive or nature reserve), give us factual information about the asset, its size, when it dates from and why it is important to your local area.
- 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 will cover.



### What you will do

We will ask you to group your activity under these headings:

- Visits;
- Using collections;
- Talking to people;
- Recording things;
- Undertaking physical works; and
- Other.

Please be as specific as possible in your answers. Please include information on who will be involved in the activities, where they will take place, and use numbers where possible. For example, the number of interviews that you will do to record people's memories.



### How you will share what you have done with other people

This might include:

- Community events;
- Celebrating your project's achievements;
- Digital things like a smartphone app, DVD or website;
- Display boards;
- Exhibitions;
- Guides/trails;
- Leaflets or books;
- Packs for schools;
- Performances; and
- Events for professionals.

Please provide details about each of the activities and things that you will produce. For example, for exhibitions you should tell us how many you will have, where they will be, how long they will run for, and what they will cover.

You can see the full application form on our website: [www.hlf.org.uk/SharingHeritage](http://www.hlf.org.uk/SharingHeritage) and a list of any supporting documents that you may need to provide in **Appendix 2: Supporting documents**.

## The difference we want to make

We describe the difference we want to make to heritage, people and communities through a set of outcomes. Outcomes are changes, impacts, benefits or any effects that happen as a result of your project.

In the application form, we will ask you to tell us which of these outcomes your project will achieve.

We don't expect projects to achieve all of these outcomes. As a minimum, we expect a Sharing Heritage project to achieve one outcome for people.

The outcome we value the most is that **'people will have learnt about heritage'**. We describe this as a 'weighted outcome'.

You can find descriptions of these outcomes in **Appendix 1: Outcomes**. These tell you what changes we want to bring about and include some suggestions of how you can measure them.

**W** Weighted

### Outcomes for people:

With our support, people will have:

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

### Outcomes for heritage:

With our support, heritage will be:

- better managed
- in better condition
- better interpreted and explained
- identified/recorded

### Outcomes for communities:

With our support:

- negative environmental impacts will be reduced
- more people and a wider range of people will have engaged with heritage
- your local area/community will be a better place to live, work or visit
- your local economy will be boosted
- your organisation will be more resilient

## Costs we can cover

### Direct project costs

Your application should include all costs that are directly incurred as a result of the project. You cannot include costs for money you have already spent.

Here are some examples of direct project costs:

- paying someone to manage the project or help with your project accounts;
- extra hours for a member of staff;
- equipment and materials;
- training;
- running activities which engage people with heritage;
- promoting your project to a wider audience.

Direct project costs do not include:

- the cost of existing staff time; or
- existing organisational costs.

## Your contribution

You do not have to make a cash contribution to the costs of your project. Whether or not you are able to offer a cash contribution, we encourage you to gain support for your project in the form of non-cash contributions and volunteer time. This helps to show your commitment to your project.

Non-cash contributions are things you need for your project that you do not have to pay for, for example, the use of a room in a local business for regular meetings or materials being donated by a local building firm. We only accept non-cash contributions if they are costs we could pay for with cash.

Volunteer time is the time that volunteers give to support your project without being paid for their work. By this, we mean the time people are contributing to the project rather than taking part in it. This could include administrative work, leading a guided walk, clearing a site or working as a steward at an event. You should not include costs for the time of people who will take part in your activities. For example, in an archaeology project, the time of a volunteer who has organised a public dig can be included, but not the time of people learning to dig.

You can tell us about any non-cash contributions and volunteer time that you expect to receive when you complete question 7 of the application form. When completing this section, use the following rates to work out the financial value of the time any volunteers will contribute:

- Professional labour (for example – accountancy or teaching) – £350 a day
- Skilled labour (for example – administrative work, carpentry or leading a guided walk) – £150 a day
- Unskilled labour (for example, clearing a site or working as a steward at an event) – £50 a day



## Making an application

When you send in your application online, we will let you know that we have received it.

You must read **Appendix 2: Supporting documents** and ensure that when you submit your application you attach all of the documents applicable to your project. We will not be able to assess your application if we do not receive all the required information.

If we have any points of clarification, then we will contact you. Otherwise, you are unlikely to hear from us until we have made a decision.

We will assess your application in eight weeks. After this your application will be discussed at a monthly advisory meeting at your local Heritage Lottery Fund (HLF) office. Following this meeting, a decision on your application will be made by the Head of your local HLF office. For further information about the decision-making timetable, please contact your local office.

When assessing your application we will consider the following:

- whether the project is relevant to heritage in the UK;
- the outcomes it will achieve;
- how capable your organisation is of carrying out the project; and
- overall value for money.

## Receiving a grant

If your application is successful, we will normally pay your full grant in one instalment, once we have given you written permission to start.

If you are successful in receiving a grant from us, your organisation will need a bank account and you will need to meet some requirements relating to buying goods, works and services, acknowledging your grant and reporting to us on your achievements. These are described in *Sharing Heritage – Receiving a Grant*.

You will need to comply with our standard terms of grant, which you can see on our website. These will last for the duration of your project with the following exceptions:

- If your project involves any capital work, the terms of the grant will last from the start of the project until five years after project completion.
- If your project includes buying a heritage item, land or building, the terms of the grant will last in perpetuity. If you wish to dispose of what you have bought in future, you must ask for our permission. We may claim back all or part of our grant.

If you think that you will not be able to complete your project before the grant expiry date then please contact your case officer who will be able to discuss this with you. We cannot guarantee an extension and do not expect these projects to last for more than two years.

When you have finished your project, we will ask you to send us an end of grant form telling us how you have spent the grant and what you have achieved. You can include the cost of evaluation in your project budget.

We may ask to see evidence of your expenditure, such as receipts or invoices.

## Buying goods, works and services

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If your project involves buying goods, works or services worth more than £10,000, then the following section is relevant to you.

You must get at least three competitive tenders or quotes for all goods, works and services worth £10,000 or more (excluding VAT) that we have agreed to fund. For all goods, works and services worth more than £50,000 (excluding VAT), you must provide proof of competitive tendering procedures. Your proof should be a report on the tenders you have received, together with your decision on which to accept. You must give full reasons if you do not select the lowest tender.

All staff posts must be advertised, with the following exceptions:

- If you have a suitably qualified member of staff on your payroll that you are moving into the post created by your HLF project. You will need to provide a job description for this post.
- If you have a suitably qualified member of staff on your payroll whose hours you are extending so that they can work on the project. In this case we will fund the cost of the additional hours spent on the project and you will need to tell us about the role they will undertake.

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

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

## Other information about your application

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### Freedom of information and data protection

We are committed to being open about the way we will use any information you give us as part of your application. We work within the Freedom of Information Act 2000 and the Data Protection Act 1998. When you submit your declaration with your application form you are confirming that you understand our obligations under these Acts.

### Complaints

If you want to make a complaint about HLF, we have a procedure for you to use. This is explained in *Making a complaint*, a document available on our website. Making a complaint will not affect, in any way, the level of service you receive from us. For example, if your complaint is about an application for funding, this will not affect your chances of getting a grant from us in the future.

Please read appendices 1 and 2 before starting to write your application. You only need to read the other appendices if they are relevant to your project.

## Appendix 1: Outcomes

We don't expect projects to achieve all the outcomes listed below. As a minimum, we expect a Sharing Heritage project to achieve one outcome for people.

### Outcomes for people

As a result of HLF support:

#### People will have learnt about heritage W Weighted

Individuals will have developed their knowledge and understanding of heritage because you have given them opportunities to get involved with heritage in ways that meet their needs and interests.

#### How you will know what you have achieved:

Adults, children and young people who took part in the project, or who are engaging with your heritage in other ways, e.g. through digital technology, will be able to tell you what they have learnt about heritage.

#### People will have developed skills

Individuals will have gained skills relevant to ensuring heritage is better looked after, managed, understood or shared (including, among others, conservation, teaching/training, maintenance, digital and project management skills). Structured training activities could include an informal mentoring programme, on-the-job training or external short courses.

#### How you will know what you have achieved:

People involved in your project will be able to demonstrate competence in new skills, and, where appropriate, will have gained a formal qualification.

#### People will have changed their attitudes and/or behaviour

Individuals will think differently about

heritage or your community, will have changed what they do in their everyday lives, or will have been inspired to take some form of personal action.

#### How you will know what you have achieved:

You will be able to show that these changes have come about as a result of their experience in your project. For example, some people may have a different perception of the importance of biodiversity or of the contribution made by young people in the community; others may have started doing conservation work or stopped vandalising a local memorial.

#### People will have had an enjoyable experience

People involved in your project will have found it fun, interesting and rewarding. You will provide an enjoyable experience by having the right resources and equipment for people to get involved with heritage.

#### How you will know what you have achieved:

People will tell you they enjoyed the opportunities for social interaction; they liked being part of a team achieving something; they enjoyed learning about heritage; and they were able to celebrate their achievements.

#### People will have volunteered time

Individuals will be contributing their time and talent and will find it a rewarding experience. They will give their time to activities at all different levels – from project leadership and management to helping at events or creating a website.

#### How you will know what you have achieved:

Volunteers will be able to report personal benefits whatever their experience, background and level of engagement. These might include: new skills; increased confidence; a sense of purpose; enhanced wellbeing; a feeling of making a contribution to heritage and society; or influencing the success of your project and the way it is regarded in the community.

## Outcomes for heritage

As a result of HLF support:

### Heritage will be better managed

There will be clear improvements in the way that you manage heritage. This could include the implementation of plans for management and maintenance, securing additional staff, Trustees or other resources that you need, or the more effective use of existing resources.

#### How you will know what you have achieved:

As a result of these improvements, you will be able to show that the heritage you manage is in a stronger position for the long term, including, if appropriate, a stronger financial position.

### Heritage will be in better condition

There will be improvements to the physical state of your heritage. The improvements might be the result of repair, renovation or work to prevent further deterioration, such as restoring a statue, conserving documents in an archive or repairing an artefact.

#### How you will know what you have achieved:

The improvements will be recognised through standards used by professional and heritage specialists, and/or by people more generally, for example in surveys of visitors or local residents.

### Heritage will be better interpreted and explained

There will be clearer explanations and/or new or improved ways to help people make sense of heritage. This might include an exhibition in a community centre; a smartphone app; talks or tours in a historic building; or archives made available online.

#### How you will know what you have achieved:

Members of your community and wider audiences will tell you that the interpretation and information you provide are high-quality, easy-to-use and appropriate for their needs and interests, that they enhance their understanding of heritage, and that they improve their experience of heritage.

### Heritage will be identified/recorded

The heritage of a place, a person or a community will have been located/uncovered and/or there will be a record of heritage available to people now and in the future. This might include identifying places or collections that are of relevance to a particular community and making information about them available; cataloguing and digitising archives; or making a record of a building or site.

#### How you will know what you have achieved:

Heritage that was previously hidden, not well known, or not accessible will now be available to the public; people will tell you that this is an important part of our heritage and that they value it.

## Outcomes for communities

As a result of HLF support:

### More people and a wider range of people will have engaged with heritage

There will be more people engaging with your heritage and this group of people will be more diverse than before your project. Changes will have come about as a direct result of your project.

#### How you will know what you have achieved:

You will be able to show that the group of people engaging with the heritage has changed; for example, it includes people from a wider range of ages, ethnicities

and social backgrounds; more disabled people; or groups of people who have never engaged with this heritage before.

### **Negative environmental impacts will be reduced**

You will have minimised the negative environmental impacts of your heritage/site and, if possible, reduced them from a current or baseline position, in the key areas of energy and water use and visitor transport. If your project is site-based, you will have taken opportunities to enhance the biodiversity (habitats and species) of the site.

#### **How you will know what you have achieved:**

At the end of your project you will be able to report on the resources you used for any physical work you undertook and demonstrate that carbon emissions that will result from your ongoing operations at your site are as low as possible.

### **Your local area/community will be a better place to live, work or visit**

Local residents will have a better quality of life and overall the area will be more attractive. Residents will report that they feel greater pride in the local area and/or have a stronger sense of belonging.

#### **How you will know what you have achieved:**

Community members will report a greater sense of shared understanding and a better sense of getting on with each other.

### **Your local economy will be boosted**

There will be additional income for existing local businesses and/or there will be new businesses in your local area. You will be able to show that local businesses have benefited from your project.

#### **How you will know what you have achieved:**

You will be able to show that these changes have come about as a direct result of your project using information about the local economy before and after your project available from organisations such as the local authority or tourism organisation.

### **Your organisation will be more resilient**

Your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future. You will achieve this greater resilience through stronger governance and greater local involvement in your organisation; increased management and staff skills; fresh sources of expertise and advice; and working in partnership to share services, staff and resources.

#### **How you will know what you have achieved:**

You might have new volunteers who increase your capacity and skills; or new sources of income through commercial activity or new fundraising programmes. You will be able to show that your organisation is stronger and in a better position for the future as a result of the changes you made as part of your project.



## Appendix 2: Supporting documents

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You will need to provide some supporting documents when submitting your application form which are listed below. When you fill in the online form, please note the following:

- There may be some documents listed on the online form which are not relevant to your project or organisation. Mark these as 'not applicable'.
- There may be some additional documents which are not listed here, but which you would like to submit as part of your application. Please submit these as 'additional documents'.
- If you attach more than 10 documents, or if the total size of the attachments exceeds 20 megabytes, you will not be able to save or submit your form. If you have more documents or very large documents, please email them to your local HLF office.

1. Copy of your organisation's constitution (formal rules), unless you are a public organisation or registered charity.

If you have sent a copy of your governing document with a previous grant application (since April 2008) and no changes have been made to it, you do not need to send it again.

2. Copies of your agreements with project partners, if applicable, signed by everyone involved, setting out how the project will be managed.
3. Copy of your organisation's audited accounts for the last financial year. This does not apply to public organisations.

4. A small selection of images that help illustrate your project. If your project involves physical heritage, please provide a selection of photographs, a location map and, if applicable, a simple site map or plan. It would be helpful if these are in digital format (either as an attachment or on disk).
5. Condition survey (if applicable). See p.5 for more information.
6. Briefs for internally and externally commissioned work (if applicable). Externally commissioned work could include paying a person outside your organisation, or another organisation, to do work as part of your project. Internally commissioned work could include paying a different part of your organisation (such as a different department in a local authority) to undertake work as part of your project. The brief should describe the work they will be doing, how long it will take, and how much it will cost.
7. Job descriptions for new posts (if applicable).
8. Letters of support (no more than six).

## Appendix 3: Digital outputs

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We have specific requirements, which are set out in our terms of grant, for 'digital outputs' produced as part of any HLF project. We are using the term 'digital output' to cover anything you create in your HLF project in a digital format which is designed to give access to heritage and/or to 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.

The requirements do not apply to digital material that has no heritage content or does not engage people with heritage, e.g. a website that contains only information about your organisation/project, visitor information or events listings.

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

- 'usable' and 'available' for five years from project completion;
- free of charge for non-commercial uses for five years from project completion;
- licensed for use by others under the Creative Commons licence 'Attribution Non-commercial' (CC BY-NC) for five years from project completion, unless we have agreed otherwise.

We expect:

- websites to meet at least W3C Single A accessibility standard;
- you to use open technologies where possible;
- you to contribute digital outputs to appropriate heritage collections.

Please read our *Using digital technology in heritage projects* guidance, which includes good practice drawn from the experience of HLF-funded projects and many others.

## Appendix 4: Property ownership

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If you are successful with your Sharing Heritage application, we expect you to own any property (land, buildings, heritage items or intellectual property) on which you spend the grant.

### Land and buildings

For projects involving buying or carrying out capital work to land or buildings, we expect you to own the freehold or have a lease of sufficient length for you to fulfil our standard terms of grant. If you do not meet our ownership requirements, we will need you to improve your rights (for example, by changing or extending a lease) or include the owner as a partner in your application, if applicable.

- For projects involving work to a building or land, if your organisation does not own the freehold, you will need a lease with at least five years left to run after the expected date of your project's completion. Otherwise, you will need to provide a letter from the owner, saying that you have the owner's permission to carry out the work. The owner will also need to sign a letter that we will prepare, agreeing to keep to our standard terms of grant.
- If your project involves buying land or buildings, you must buy them freehold or with a lease with at least 99 years left to run after the expected project completion date.
- We do not accept leases with break clauses (these give one or more of the people or organisations involved the right to end the lease in certain circumstances).
- We do not accept leases with forfeiture on insolvency clauses (these give the landlord the right to end the lease if the tenant becomes insolvent).
- You must be able to sell on, sublet and mortgage your lease but if we award you a grant, you must first have our permission to do any of these.

### Heritage items

For projects involving buying a heritage item or carrying out conservation work to a heritage item (for example, a steam train or a painting), we expect you to buy or own the item outright. However if you are borrowing item/s as part of the project e.g. for an exhibition, and are asked to contribute towards the costs of conservation for this item/s then we may accept this cost if it forms a small part of your project. The owners of the item/s may need to be tied into your Partnership Agreement, or tied into the Standard Terms of Grant if a grant is awarded. Please contact your local team to discuss this if you think this will apply to your project.

### Digital outputs

If you create digital outputs we expect you either to own the copyright on all the digital material or to have a formal agreement with the copyright owner to use the material and to meet our requirements – see [Appendix 3: Digital outputs](#).

## Appendix 5: Buying land and buildings

### Overview

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

If you already manage the land and/or buildings that you want to buy, you will need to show us what extra benefits the purchase will bring. You will need to show that all options for entering into an appropriate management agreement with the freehold owner have been explored before seeking a grant for purchase.

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

- the lead applicant is a not-for-profit organisation;
- any risks to their preservation will be reduced by your purchase;
- the price accurately reflects the condition and value;
- the purchase will contribute to more people engaging with the heritage;
- you have adequate plans for management and maintenance over a period of at least 5 years after project completion;
- you can demonstrate their significance to the heritage in a local, regional or national sense.

We will not support purchases which we think are above market value. We can fund all associated purchase costs such as agent's fees, saleroom fees and taxes. Please ensure these are reflected in your project costs.

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

### The information we need about the purchase

You will need to provide:

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

## Appendix 6: Buying heritage items and collections

### Overview

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

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

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

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

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

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

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

We will not give priority to a purchase simply because of an export stop. An export stop gives organisations a chance to raise money needed to buy an item or collection which is intended for export. The export stop defers the export licence for a specified period in order that an offer may be made from within the UK. If you intend to apply to us you should contact your local HLF office as soon as possible, and within the first deferral period.

### Costs

The eligible costs associated with a purchase include:

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

Ineligible costs include:

- seller's fees (e.g. legal and agents' fees).

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

### The information we need about the purchase

You will need to provide:

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



- evidence that the current owners are the owners (have legal title) and have the right to both sell the item(s) and transfer the title to the new owner;
- an independent valuation on an open-market basis for the item(s) you wish to buy; this should include the valuer's reasoning to support the valuation, not just a statement of the value; you do not need to commission a valuation for an item (or items) which is the subject of an export stop or part of the Treasure Valuation Process. We may also arrange for our own valuation. We will normally be prepared to support a purchase at a figure up to 10% above the top of any range in an accepted valuation;
- evidence that you have followed current guidance on portable antiquities, illegal trade, and items and collections that could be sensitive. You should provide a statement outlining your research into the relevant laws and guidelines on ethical acquisitions;
- a description of how you will manage the item(s) and keep it secure, both at the time you buy it and in the future; and
- a conservator's report saying whether the item(s) have conservation needs and, if so, how you will meet those needs. The report should include evidence that your organisation has the right environmental conditions to house the purchase.

## Appendix 7: Acknowledgement and promotion of your National Lottery grant

As part of your grant contract you commit to acknowledging your HLF grant and promoting the National Lottery. Please give us an overview of the steps you will take to do this during the delivery of your project and after its completion, in accordance with the 'How to acknowledge your grant' guidance.

Please let your grants officer and the press office know before you give an interview, make a public statement or issue a press release relating to a project or work that we have funded when you initially announce the grant and at completion of the project. At other times, please notify us of any press and media plans you have so that we can provide support where necessary, check for any potential clashes and look at broader issues or possible links with similar activities that we are planning ourselves.

When submitting your End of Grant report you should provide an outline of how, where and when you featured the joint Heritage Lottery Fund/National Lottery branding at your project and on your website. You should also provide an overview of how you promoted National Lottery funding of your project in the media e.g. through local press/broadcast coverage, online and through regular social media activity; at project events and openings.

More ideas on acknowledgement and promotion, and the branding we expect to be featured, can be found on our website in the running your project section:

**[www.hlf.org.uk/running-your-project](http://www.hlf.org.uk/running-your-project)**

If you need any help or have any questions about how to acknowledge your grant please contact your case officer.

