

Funding

Is this funding right for you?

- Are you applying for funding to support a heritage asset of outstanding importance in the UK?
- Have you explored all other sources of funding?
- Will the heritage asset be publicly accessible if you secure a National Heritage Memorial Fund grant?
- Are you a local authority, public sector or not-for-profit organisation?

If you have answered yes to the above questions, you may be eligible to apply.

About the Memorial Fund

The National Heritage Memorial Fund exists as a fund of last resort to support the UK's most outstanding heritage, which is at risk of loss. It also exists to create a publicly accessible and timeless collection as a memorial for those who have given their lives for the UK.

Since 1980, we have funded acquisition, conservation and preservation that has safeguarded over 1,400 iconic buildings, land and heritage items across England, Scotland, Wales and Northern Ireland.

This includes:

- [Sir Joshua Reynolds's Portrait of Mai \(Omai\)](#), National Portrait Gallery
- [The Mary, Queen of Scots Casket](#), National Museums Scotland
- [Gwyrch Castle](#), Gwyrch Castle Preservation Trust
- [The Honresfield Library Manuscripts](#), Friends of the Nations' Libraries
- [Orford Ness](#), National Trust
- [The Staffordshire Hoard](#), Birmingham Museum & Galleries and The Potteries Museum & Galleries
- [The Flying Scotsman](#), National Railway Museum

Our funding

We receive grant in aid funding from central government. We use this funding to award grants to UK based organisations to safeguard heritage in perpetuity.

Find out if your project is eligible by reading our [application guidance](#).

Our application guidance contains more information about:

- who and what we can fund
- our assessment standards
- what to expect from the application process

How to apply for a grant

You can apply for a grant whenever you're ready.

Expression of Interest

The first step is to submit an Expression of Interest. We'll contact you within 10 days with feedback. If we recommend a full application, we'll release an application form for you to complete.

Read our guidance on [completing an Expression of Interest](#).

Application

Once you submit your application we'll check we have everything we need to make an assessment and let you know when you can expect a decision.

Read our guidance on [completing an application](#).

Our funding portal

Use our [online funding portal](#) to submit an Expression of Interest or apply for funding. First-time users will need to [create an account](#).

Contact NHMF-enquiries@heritagefund.org.uk for any pre-application queries.

Successful applications

If your application is successful, you'll be sent a grant contract to fill out and return. You must also complete our Permission to Start form.

Read our [guidance on receiving a grant](#).

Application guidance

Our funding

The National Heritage Memorial Fund exists as a fund of last resort to support the UK's most outstanding heritage, which is at risk of loss. It also exists to create a publicly accessible and timeless collection as a memorial for those who have given their lives for the UK.

The Memorial Fund receives grant in aid funding from central government. We use this funding to award grants to UK based organisations to safeguard heritage in perpetuity.

What we fund

What can be included

We can help with the purchase, conservation or preservation of any heritage which meets our assessment standards.

For example:

- works of fine and decorative art
- museum collections
- archives
- manuscripts
- items of industrial, transport and maritime heritage
- historic buildings
- land
- archaeology

What can't be included

Whilst we can help with the purchase, conservation and preservation of any heritage, we cannot fund:

- items that have already been purchased, or that have been secured with a down payment or deposit
- yearly revenue funding

- day-to-day running costs or ongoing maintenance
- the costs of payroll staff
- development studies
- research projects
- costs of general furniture, fittings and equipment

Your contribution

You must be able to prove that you have explored, or are exploring, all other possible sources of funding. If applicable, you must be able to tell us why you cannot raise any other funds.

The Memorial Fund can only fund the total cost of your project in exceptional circumstances.

Who we fund

Who can apply

We fund organisations who are able to care for the heritage forever and provide public access to it.

We can provide grants to:

- local authorities
- other public sector organisations, such as a school or a university
- some not-for-profit organisations which are not in the public sector

Who can't apply

We can't provide grants to:

- private individuals
- commercial businesses

Partnerships

You may wish to deliver your project in partnership with other organisations. You will need to tell us about these organisations and their contribution to your project.

Our assessment standards

For your project to be eligible for support from the Memorial Fund it must meet our assessment standards. If you cannot show us how your project strongly meets these standards, we will not be able to fund it.

Importance to UK heritage

Your project must involve objects, collections, buildings or land that are of particular importance to UK heritage. Any type of heritage can be funded, but we will not normally consider heritage which is less than 10 years old, since it is generally difficult to judge the importance of such items.

We understand the importance of heritage to be its value to past, current and future generations. This value may be due to archaeological, architectural, scientific, technological, natural, artistic, cultural or historic importance. We consider that if a heritage item is important to the heritage of any one of the four nations it is of importance to UK heritage.

Some categories of heritage are designated. Where designations apply, we take these into account as indicating the importance of the heritage. These include; Grade I and II* (category A and B+) listed buildings, Registered Parks and Gardens, Scheduled Monuments, Designated Collections (Recognised Collections), National Parks and Landscapes, Sites of Special Scientific Interest (SSSIs), National Historic Fleet vessels.

We also take into account other measures of importance where these exist and where they reflect high heritage importance and a strong connection to UK culture. We consider applications for heritage items which are available to acquire through the government processes of Treasure or Export Deferral, but our funding standards are different from the criteria of these schemes.

The Memorial Fund is not limited to support of designated heritage. We understand that important heritage may have no formal designation or recognition, including heritage of Communal Value and Intangible Cultural Heritage. Applications must demonstrate that the heritage is of importance to the UK, rather than of importance on a local or regional level.

Outstanding interest

The heritage for which you are seeking our support must be in some way outstanding. This could be because of rarity, quality, or association with a historic figure or event.

Some examples are:

- **Land** of outstanding scientific, scenic, ecological, archaeological or historic interest, or land you wish to buy to protect an outstanding building or area.
- **Buildings** of outstanding aesthetic (pleasing to look at), architectural, historic, engineering or scientific interest, including bridges, piers and other built structures.
- **Objects** of outstanding aesthetic, historic, artistic, technological, archaeological or scientific interest. These include works of fine and decorative art, textiles, books, manuscripts and objects such as motor cars or ships.
- **Collections** of objects which, taken as a whole, demonstrate outstanding scientific, historic or artistic interest. We will consider whether it is important to keep a collection of objects together to maintain important historic connections and the completeness of a historic entity.

At risk

The role of the Memorial Fund is to preserve the UK's heritage by saving important heritage that is at risk of loss. You must be able to demonstrate that the heritage in question is at risk of loss should your application not be funded.

Risk of loss could mean the risk of physical loss through destruction or deterioration of the heritage. It could also mean the loss of the heritage to UK public appreciation, through it leaving the UK and/or publicly accessible heritage being lost to public view.

Last resort

The Memorial Fund acts as a fund of last resort. Applications must demonstrate that all other possible sources of support have been explored and show why these have not been possible, including The National Lottery Heritage Fund. Applications should show that support from the Memorial Fund is the last chance for the heritage to be safeguarded.

Examples of approaching the Memorial Fund as a last resort may include; where pressing timescales attached to your proposal for safeguarding heritage rule out

other funding options, where Memorial Fund support is needed to kickstart a challenging fundraising campaign, where our support is needed to close a final funding gap or where a complex set of circumstances and risks rules out other funding support. Applications must always demonstrate that other funding options have been explored.

Further information

Costs and whether your proposal is realistic

We need to know that your project costs and plan are realistic, and that you can offer secure long term care for heritage you wish to acquire or safeguard through emergency repairs or other works. All applications must reflect that the project is deliverable, will achieve value for money and provide long term sustainability for the heritage in order to demonstrate that Memorial Fund support will safeguard heritage for future generations.

Costs

For acquisition proposals the price of the heritage you wish to buy must not exceed the current market value. Memorial Fund cannot support projects where you propose to pay more than the heritage is worth in order to secure it. You must commission an independent valuation to include with your application which should reflect that the purchase price you propose represents the item's market value. As part of our assessment we will commission our own valuations to confirm this.

Valuations are not required for Export Deferred items or those declared Treasure as the value has already been fixed by a panel of independent experts. If you are applying to purchase heritage through a private treaty sale your valuation must show that the gross price on which the calculation is based represents the item's market value.

For projects involving capital works, such as emergency repairs, salvage or transportation of a heritage item, you must demonstrate that the costs of those works have been fully and accurately estimated. If your project involves capital works your application must include a clear and realistic cost plan and timetable informed by professional advice which takes into account any necessary statutory approvals or planning consents.

Proposal, or project scope

The Memorial Fund gives grants to preserve heritage for the UK in perpetuity, forming a permanent collection as a memorial to those who have given their lives for the UK. We expect you to be able to demonstrate that you can provide an appropriate, permanent and secure ownership for anything that you wish to purchase or that our funding supports, and that you are able to maintain and care for it forever.

Where you are acquiring heritage your application must show how you will deliver its ongoing care and conservation, with appropriate expertise to ensure the physical condition of the heritage is maintained for the long term.

If your application is for emergency safeguarding work you must show that these works are urgently necessary to prevent the loss of the heritage you are seeking support for. The Memorial Fund can support repairs, and in some cases transport costs, needed to prevent further deterioration and bring heritage into a steady state. Non-urgent conservation and restoration works are not costs that Memorial Fund can usually support, as these should be part of a longer term project.

Applications should demonstrate that the risks of project delivery and long term management have been considered and mitigated as far as possible. You should show how you will continue to review and manage risks through project delivery and following completion.

Financial need

You must demonstrate that you have made efforts to secure funding from all other possible sources including your own organisation. The Memorial Fund is a fund of last resort and has limited resources. Although we do not have rules for partnership funding we will only pay for the total cost of a project or acquisition in exceptional cases. We give higher priority to applications meeting our essential standards which also demonstrate that every effort has been made to reduce the level of grant request to the Memorial Fund.

Public access

Memorial Fund support will always require public access to the heritage we fund. We expect that an aim of your project will be to increase public access to, and engagement with, the heritage your project focuses on. We welcome applications which propose a varied range of physical and virtual access and which aim to engage a diverse range of people with the heritage.

In some cases an object may be too fragile for long term display, or unrestricted access to land or a building could put it at risk. In these cases you should explain how you will provide alternative forms of public access to the item when it is not available for physical public access.

Apply for funding

Expression of Interest

You must first submit an [Expression of Interest](#) through our online service.

You will be asked to provide brief information about your proposed project and how it will meet our assessment standards.

You must answer all the relevant questions and, if appropriate, provide any supporting documents.

We will review your Expression of Interest and aim to provide feedback within 10 working days.

If your project timescale allows, your Expression of Interest will also be discussed by our Memorial Fund Panel. The Panel provide advice on which applications to prioritise.

If a full application is recommended, you will be invited to apply.

If you are not invited to make a full application, we will explain our reason why.

Application

If you are invited to apply, you must submit an [application](#) through our online service.

You will be asked to provide detailed information about your project and how it will meet our assessment standards. You must answer all the relevant questions and provide the required supporting documents.

Once you submit your application, we will check we have everything we need to make an assessment and will let you know when you can expect a decision. We will not be able to start assessing your application until we have all the information we need, as well as the required supporting documents.

Assessment process

We will assess your application against our assessment standards.

If your application does not meet all of our assessment standards, it is unlikely to be successful.

Assessment time

We aim to assess your application and let you know the decision within six months.

If your application requires an urgent decision, we may be able to assess your application and let you know the decision within three months.

In exceptionally urgent cases, we may be able to assess your application and let you know a decision in less than three months. We call this a fast track application. We can only accept fast track applications if we consider the project straightforward.

An application may be considered urgent if:

- it includes an auction sale
- there is an Export Deferral
- it includes declared Treasure

Decisions

Decisions on applications are made by our Board of Trustees.

The Board of Trustees usually meet six times a year. Applications are scheduled for decision at the most appropriate Board meeting.

If your application is successful

We will prepare a grant contract setting out our terms of grant, which your organisation must comply with and sign.

Once the grant contract is in place, you will need to complete the permission to start process. Read our [Receiving a grant guidance](#) to find out more.

If your application is unsuccessful

The assessment process is competitive and we cannot fund all the applications that we receive. We will let you know the reason why your application was unsuccessful and, where we can, provide further advice.

Ready to start your application?

Read our guidance on completing an [Expression of Interest](#).

Expression of Interest questions

This page includes the questions we ask in the Expression of Interest. We have also provided guidance which we recommend you refer to when answering them.

Before submitting make sure you've read our [application guidance](#).

When you are ready, please complete the Expression of Interest on our [online service](#).

What is the title of your project?

Give us a title or name we can refer to your project by.

You may wish to include the name of the buildings, land or heritage items your project focuses on in the title. We encourage you to keep it short and descriptive.

This will be seen by our decision makers, and if your application is successful, will be used in any public posts made about your project and will be published on our website. Make sure you choose a title that you are happy for a wide range of people to see.

Project reference number

You don't need to fill this in. It is automatically generated.

Are you a not-for-profit organisation?

If so, you will need to select the tick box.

If you are a not-for-profit organisation, you will need to tell us your organisation type.

Where did you hear about the National Heritage Memorial Fund?

You must select one of these options:

- Our Annual Report
- The National Lottery Heritage Fund
- Other Memorial Fund project
- Our website
- Other

If other, you should tell us where you heard about the Memorial Fund

About your project

Tell us about your project

Briefly tell us about the heritage you want to save, its importance and how your project will safeguard it.

Provide more detail about the buildings, land or heritage item your project focuses on

Briefly provide us with factual information about the buildings, land or heritage items.

This could include:

- the name of the buildings, land or heritage items
- who made them
- when they were made

Are there any important deadlines which will affect your project?

If so, tell us about these deadlines. They could relate to the sale, or anniversaries or significant events relating to the heritage.

You must tell us if there is a date you need a decision by.

Our assessment standards

Importance to UK heritage: how are the buildings, land or heritage items of importance to UK heritage?

Briefly explain why you believe the items that you are seeking funding for are important to UK heritage.

Outstanding interest: how are the buildings, land or heritage items of outstanding interest?

Briefly explain why you believe the items you are seeking funding for are of outstanding interest.

At risk: how are the buildings, land or heritage items at risk of loss?

Briefly tell us how the buildings, land or heritage items you are seeking our funding for are at risk of loss.

Last resort: why do you need Memorial Fund support to safeguard the buildings, land or heritage items?

As the Memorial Fund is a fund of last resort, briefly tell us why our funding is essential and about any other funding options you have considered.

Your project costs

Tell us about your project costs

Briefly provide a summary of your project costs and how you have calculated them.

This should include:

- what the major costs will be
- details of purchase prices
- any professional advice you have taken

How much funding are you likely to apply for?

This must be a number.

How will you care for and manage the heritage after the project ends?

As the Memorial Fund terms of grant last in perpetuity (forever), briefly tell us about your organisation's long term plans to provide appropriate care and conservation for the heritage.

Tell us about your partnership funding

Briefly tell us about any partnership funding you have already secured, and any you hope to secure.

Funding from The National Lottery Heritage Fund cannot be used as partnership funding in applications to the Memorial Fund.

The Memorial Fund can only fund the total cost of your project in exceptional circumstances.

Additional information

How will the public access the buildings, land or heritage items?

Briefly tell us how the public will access the buildings, land or heritage items.

Do you want to upload any files?

If so, you will need to select the tick box.

You may wish to upload:

- images that help illustrate your project
- additional information about the heritage which demonstrates its importance to UK heritage and its outstanding interest

[Application questions](#)

This page includes the questions we ask in the application. We have also provided guidance which we recommend you refer to when answering them.

You must submit an [Expression of Interest](#) before making a full application.

When you are ready, please complete your application on our [online service](#).

What is the title of your project?

Give us a title or name we can refer to your project by.

You may wish to include the name of the buildings, land or heritage items your project focuses on in the title. We encourage you to keep it short and descriptive.

This will be seen by our decision makers, and if your application is successful, will be used in any public posts made about your project and will be published on our website. Make sure you choose a title that you are happy for a wide range of people to see.

Give us a summary of your project

Briefly tell us about the heritage you want to save, its importance and how your project will safeguard it.

About your organisation

Tell us your organisation's address

You will need to provide your:

- street name
- town or city
- county
- postcode

Is your project's address the same as your organisation's address?

Your project may be taking place somewhere different than your organisation. Tell us where that is. We understand that you might not have a postcode. Tell us

the closest postcode to your project's location.

Describe your organisation and the work your organisation does

You will need to tell us about:

- your organisation's day to day activities
- your mission and purpose

Tell us the legal status of your organisation

The types of organisation you will be able to select from are:

- Local authority
- Other public sector organisation, such as a school or a university
- Not-for-profit organisation not in the public sector

If you are a registered company, you will need to tell us your company number.

If you are a registered charity in England, Scotland, Wales or Northern Ireland, you will need to tell us your charity number.

Is your organisation VAT registered?

If so, you will need to tell us your VAT number.

About your project

Tell us about the heritage your project will focus on

Provide us with factual information about the heritage.

This can include:

- the name of the buildings, land or heritage items
- the date it was built or created
- the artist, designer, maker or author
- the medium it is in
- the style it is in
- the size of the buildings, land or heritage items
- a summary of the condition of the buildings, land or heritage items

- any surviving or notable features

Will you be acquiring any buildings, land or heritage items as part of your project?

If so, you will need to select the tick box.

If your project involves buying buildings, land or heritage items, provide details about the sale

If so, you will need to tell us about:

- the details of any auction sale or private sale which has been agreed
- any deadlines relating to the sale, such as auction dates, export deferral deadlines or deadlines set in the Treasure process
- how the buildings, land or heritage items you wish to acquire are being offered for sale
- the process you will need to follow to acquire them
- details of any purchase price advertised or set, including auction estimates
- the details of the freehold interest or lease (any lease must have at least 99 years left to run)
- the provenance of the buildings, land or heritage items and where they are currently located

If your project involves buying buildings, land or heritage items, provide details about the valuation

If so, you must provide an independent valuation for the buildings, land or heritage items. You must have commissioned this yourself and it must demonstrate that the price you propose to pay represents its market value.

A copy of the independent valuation should be submitted as a supporting document.

Valuations are not required for export stopped items or those declared Treasure. This is because the value has already been fixed.

For items being purchased through a private treaty sale, your valuation must show that the gross price on which the calculation is based represents market value.

The Memorial Fund will also seek our own independent valuation as part of our assessment to verify the price. We cannot support acquiring buildings, land or heritage items where the price is greater than the market value.

Will your project involve work to physical heritage, such as buildings, landscapes, habitats or collections?

If so, you will need to select the tick box.

You will then need to tell us:

- if the building, land or heritage item is owned by:
 - your organisation
 - a project partner
 - neither
 - not applicable
- if there any legal conditions, restrictions or covenants associated with the heritage which may affect your project
- if a condition survey has taken place in the last five years
- if applicable, a grid reference for landscapes

Our assessment standards

Importance to UK heritage: how are the buildings, land or heritage items of importance to UK heritage?

Your project must involve buying, maintaining or preserving buildings, land, objects or collections that are of high importance to UK heritage. You must explain why you believe the items that you are seeking funding for are important to UK heritage.

If it is important to the heritage of any of the four nations, we consider it to be of importance to UK heritage.

Buildings, land or heritage items may be significant because:

- they have been in the UK for many years and have a strong historical connection
- they may have a strong connection to UK culture
- they may be associated with a historic event, movement or artistic style

- the items represent a technological achievement or important moment in industrial history
- if land, it preserves nature, archaeology or biodiversity which is unique to the UK

You should also tell us about any designations or recognition, which reflect its importance to UK heritage.

This can include:

- Grade I and Grade II* listed buildings in England and Wales
- Category A and B+ listed buildings in Scotland and Northern Ireland
- Registered Parks and Gardens
- Scheduled Monuments
- Designated and Recognised Collections
- National Parks and Landscapes
- Site of Special Scientific Interests (SSSI)
- National Historic Fleet vessels

If it is not designated or recognised, tell us more about why it is important to UK heritage rather than to a local area or region.

Outstanding interest: how are the buildings, land or heritage items of outstanding interest?

The buildings, land or heritage items that are the focus of your project must also be of outstanding interest. You must explain why you believe the items you are seeking funding for are of outstanding interest.

This could be because of rarity, quality, cultural value or association with a historic figure or event.

This could include:

- land of outstanding scientific, scenic, ecological, archaeological or historic interest, or land that is the site of an outstanding building or area
- buildings of outstanding aesthetic, architectural, historic, engineering or scientific interest, including bridges, piers and other built structures
- objects of outstanding aesthetic, historic, artistic, technological, archaeological or scientific interest, including works of:
 - fine and decorative art
 - textiles

- books or manuscripts
- industrial, transport and maritime heritage items
- collections which taken as a whole demonstrate outstanding scientific, historic or artistic interest, where you believe it is important to keep items or objects together to maintain important historic connections and completeness

You should also tell us about any key dates or milestones which are relevant to or related to the heritage.

At risk: how are the buildings, land or heritage items at risk of loss?

You must tell us how the buildings, land or heritage items you are seeking our funding for are at risk of loss should your application not be funded.

At risk could mean risk of physical loss, if the heritage is about to be damaged, destroyed or developed in an inappropriate way. It could also mean risk of the heritage being lost to UK public access.

Heritage may be at risk of loss because of:

- physical damage or neglect
- loss of access to the UK public, including through export
- destruction or deterioration

Last resort: why do you need Memorial Fund support to safeguard the buildings, land or heritage items?

As the Memorial Fund is a fund of last resort, you must tell us why our funding is essential for your project to happen. You must show that support from the Memorial Fund is the last chance for the heritage to be saved.

This should include:

- who else you have approached for safeguarding support and why you approached them
- if other support has or has not been possible, and the reasons why
- what other strategies and options you have explored
- why other strategies and options were not appropriate

What other funding options have you considered?

The Memorial Fund is a fund of last resort and has limited resources. You must tell us about all other funding sources that you have considered, including any partnership funding.

This should include any funding:

- you have secured to help towards the cost of your project
- you have applied for or are planning to apply for to support this project
- will raise through fundraising or crowdsourcing
- can provide from your own reserves or budgets

The Memorial Fund can only fund the total cost of your project in exceptional circumstances. Higher priority is given to applications that strongly meet our assessment standards and that demonstrate every effort has been made to reduce the total grant request.

If applicable, you should explain why you are not able to raise any other funding from either your own resources or other sources.

How will the public access the buildings, land or heritage items?

The Memorial Fund expects that the public will be able to access the heritage that it funds. You must tell us how the public will access the buildings, land or heritage items.

This could include:

- opening the heritage up for the public to visit or putting it on display
- events, activities or visits
- educational resources
- digital outputs, like online resources or exhibitions

You should also tell us:

- how many visitors you expect to engage
- the number of days per year the heritage will be accessible
- if applicable, the admission fee that you will charge

We recognise that conservation needs may restrict public access. In these cases we expect you to provide alternative ways for the public to access the heritage, for example online resources or virtual exhibitions.

Managing your project

Why is your organisation best placed to deliver this project?

You must tell us why specifically your organisation is able to deliver this project at this time.

This may include:

- your organisation's experience with this type of heritage or similar heritage
- staff, Board members or Trustees' knowledge and skills
- your organisation's capacity to deliver the project at the same time as your usual work
- your connections with other relevant organisations

How will you deliver your project?

You must tell us how your project will be managed day to day.

This should include telling us:

- the roles and responsibilities of the people involved
- who will be responsible for making decisions
- about your project's reporting structure

Will your project be delivered by a partnership?

If so, you must tell us who your partners are, the nature of your partnerships and how you will work together.

Tell us about the risks to your project

We recognise that all projects face risks. We want to see how you have planned for any risks that you may face during your project, and how you will manage them.

These risks could include:

- encountering difficulties in delivery of capital works
- restrictive deadlines or potential delays
- a reduced partnership funding

- a shortage of people with the skills you need or staff needed to work on other projects
- an unexpected rise in the market value of the items you need to buy for your capital project
- a significant change in the project team
- changes in law that make the project impractical
- difficulties in finding sources of timber from well managed forests

You will need to enter each risk into the table separately, telling us:

- what the risk is
- the likelihood of the risk occurring
- how this will impact your project
- how you will handle the risk
- who will lead on this

We expect you to continue to review and manage risks throughout the delivery of your project.

When do you expect your project to start and finish?

You will need to give us a start and end date for your project.

After your project ends

How will you care for and manage the heritage?

As the Memorial Fund terms of grant last in perpetuity, you must tell us about your organisation's long term plans to care for and manage the heritage.

This should include how your organisation will:

- provide an appropriate and permanent home for the buildings, land or heritage items
- provide appropriate care and conservation for the heritage
- continue to meet our terms of grant and any additional grant conditions
- meet any additional costs involved
- meet any changes needed to its organisational structure or capacity
- maintain public access to the heritage

Tell us about the risks to your project after it has finished

We want to see how you have planned for any risks that you may face after your project ends, and how you will manage them.

This should include telling us what will happen to the buildings, land or heritage items if your organisation is no longer able to care for them.

You will need to enter each risk into the table separately, telling us:

- what the risk is
- the likelihood of the risk occurring
- how this will impact your project
- how you will handle the risk
- who will lead on this

How will you evaluate your project?

We encourage you to evaluate your project. You should tell us how you would approach and plan for evaluation.

This could include:

- any evaluation methods you may use
- how you would share your learning with other organisations

Your project costs

Tell us about your project costs

You must demonstrate how you have calculated your project costs.

This should include showing how:

- you have fully and accurately estimated the costs
- they are informed by professional advice
- they represent value for money

Add your project costs

You must provide a summary of your project costs, using a single line for each cost heading. If your project includes capital works, you will also need to provide a separate spreadsheet as a supporting document. This must show how these summary costs are broken down.

You will need to enter each cost into the table separately, telling us:

- the cost heading
- a description of the cost
- the amount, without VAT
- if relevant, the VAT amount

VAT

- should only be included in the VAT column
- if included, must be clearly shown on all quotes
- cannot be paid on certain types of work or may be paid at a lower rate – it is your responsibility to approach HM Revenue & Customs to understand VAT and VAT rates
- if your VAT status changes during your project we will reduce our contribution to the costs where you have been able to claim back the VAT and you will need to return this to us
- if you spend less on VAT, you can ask our permission to transfer the underspend to another cost heading. You will need to demonstrate a clear need for this change.

Cost headings

Purchase price of items or property:

- Only include the purchase price of the buildings, land or heritage items.

Repair and conservation work:

- Include costs for repairing or conserving the buildings, land or heritage items.

Fees:

- Include all fees directly related to purchasing the buildings, land or heritage items.
- This can include:
 - agents' fees
 - the buyer's premium for sales at auction
 - conservation reports
- Only fees incurred by your organisation as the buyer are eligible - you cannot include fees incurred by the seller.

Other:

- Include costs that do not fit within any of the other cost headings, for example:
 - non-reclaimable VAT
 - transport costs
 - travel
- Make sure you give a clear description of what these costs are.

Professional fees relating to any of the above:

- Include costs for any services you will need to pay for during your project.
- Fees should be in line with professional guidelines and based on quotes from the professional or professional body you are paying.

Add any partnership funding

You should add all sources of partnership funding and select whether these are secured or not. All partnership funding must be in the form of cash contributions. By secured we mean that you have cash in your bank account reserved specifically for this project, or the money has been formally offered.

You do not have to have all the contributions in place when you apply to us. However, you must have them in place by the time you are ready to apply for permission to start. We will assess whether your partnership funding expectations are realistic.

Funding from The National Lottery Heritage Fund cannot be used as partnership funding in applications to the Memorial Fund.

The sources of partnership funding you will be able to select from are:

- Local authority
- Other public sector
- Central government
- Private donation from an individual
- Private donation from a trust, charity or foundation
- Private donation from a corporate organisation
- Commercial or business
- Own reserves
- Other fundraising

If you have unsecured partnership funding, how and when do you expect to secure this?

- If so, you should tell us:
- who you expect the funding from
- how much you are expecting
- when you expect it receive it

Additional information and declaration

You will be asked to read and agree to our declaration.

Data Protection

We are committed to being as open and transparent as possible. This includes being clear about how we assess and make decisions on our grants and how we will use your application form and other documents you give us. we follow all data protection laws and regulations that are applicable and in force from time to time (the 'Data Protection legislation' 'or UK GDPR'). As defined by the Data Protection legislation the Trustees of the National Heritage Memorial Fund is a data controller. Our Privacy Policy contains additional information including contact information for our Data Protection Officer. It can be found on the National Heritage Memorial Fund website.

As part of the application process we will collect your name, contact information and position at the organisation you represent, as well as any additional personal information you supply about others involved in your project. We may share this information with consultants if they are appointed to help us assess your application.

We may use your application form and other documents you give us, and the data contained within:

- To decide whether to give you a grant.
- To provide copies to other individuals or organisations who are helping us to assess, monitor and evaluate grants.
- To share information with organisations and individuals working with us with a legitimate interest in National Heritage Memorial Fund applications and grants.
- To hold in a database and use for statistical purposes.

- If we offer you a grant, we will publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and in the publications or websites of relevant Government departments and any partner organisations who have funded the activity with us.
- If we offer you a grant, you will support our work to preserve the nation's heritage by contributing (when asked) to publicity activities and participating in activities to share learning, for which we may put other grantees in contact with you. This may include sharing your information and any subsequent publicity with third party partner distributors.

Freedom of Information

As a public organisation we are subject to the Freedom of Information Act 2000 and Environmental Information Regulations 2004 which give the public a right of access to the information that we hold, unless any exemptions apply. This includes any recorded information provided to us by our applicants and grantees.

When you complete this Declaration, you are confirming that you have no objection to us releasing the application form and any other information you provide to us to anyone who asks to see them once your application has completed the assessment process. If there is any information that you don't want made publicly available, please explain your reasons below:

(You will be able to explain your reasons here.)

If we receive a request for information we will always consult you first and will take your comments into account and will apply the exemptions in the Freedom of Information Act 2000 and Environmental Information Regulations 2004. However, the decision to release or withhold your information is our decision and we will not be responsible for any loss or damage you suffer as a result of our meeting these responsibilities.

We may contact you from time to time to keep you informed about the work of the National Heritage Memorial Fund.

- I confirm that the organisation named on this application has given me the authority to complete this application on its behalf.

- I confirm that the activity in the application falls within the purposes and legal powers of the organisation.
- I confirm that the organisation has the power, if awarded, to accept a grant under certain conditions and to pay back the grant if it does not meet the grant conditions.
- I confirm that, as far as I know, the information in this application is true and correct.
- I consent to my personal data being used as described and understand that should the requirement change from that described I will be informed at the earliest reasonable time.

Supporting documents

You will need to provide relevant supporting documents for your application.

For all applications

Governing document

You must provide your organisation's governing document, for example a constitution, trust deed, memorandum or articles of association.

You must have at least two people on your board or management committee who are not related by blood or marriage, or living at the same address.

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 fund your organisation if your constitution does not include the above. The [Charity Commission](#) provides guidance on creating a governing document.

We do not need to see your governing document if you are:

- a public organisation, for example, a local authority or university
- a charity registered with the Charity Commissions for England, Wales or Northern Ireland, or the Scottish Charity Regulator

Accounts

You must provide your organisation's most recently audited or accountant verified accounts.

Accounts need to:

- be in the legal name of your organisation
- be dated
- be signed with a handwritten signature (this does not include digital signatures)
- include the title of the person who is signing them - this person must be a director, trustee, accountant, or other senior figure in your organisation

If your organisation's accounts are older than 18 months, you must also provide three months of your most recent bank statements. This should be the three months before the date you submit your application.

If your organisation was set up less than 14 months ago and does not have a set of audited accounts, you must provide your last three bank statements or a signed letter from your bank confirming that your organisation has opened a bank account.

We do not need to see your accounts if you are a public organisation, for example a local authority or university.

Revenue budget

If your organisation is a public organisation, for example a local authority or university, you must provide details of your department or faculties revenue budget. This should include the last three complete financial years and the current financial year.

Public liability insurance

If applicable, you must provide a copy your organisation's public liability insurance.

Main contact confirmation

You must provide confirmation that you, as the main contact, have the authority from your organisation to make this application.

Images

You must provide a small selection of images that help illustrate your project.

This could include:

- recent or historic images of the buildings, land or heritage items
- plans, drawings or blueprints
- a map showing the locations involved in your project

Make sure you have all the permissions required to share these with us, as we may use these to tell people about your project, including our decision makers. We might also use any images you send us to promote your project publicly.

Additional heritage information

You must provide additional information about the heritage. This should demonstrate the buildings, land or heritage items importance to UK heritage and its outstanding interest.

This could include:

- published articles
- exhibition catalogue entries
- an extract from the sale catalogue if the item is being sold at auction

For applications to acquire buildings, land or heritage items

Acquisitions and disposals policy

You must provide a copy of your acquisitions and disposals policy.

Lease

If you are buying a leasehold property, you must provide a copy of the lease.

Condition report

You must provide a condition report or another appropriate document to tell us the current condition of the buildings, land or heritage items. It should also outline the works that are needed to return the buildings, land or heritage items to a good condition.

The report should also indicate the relative priority of the proposed works so you know which are the most critical and need to be tackled most urgently.

There are other types of survey which may be relevant to include as part of a condition report, such as a building performance and energy efficiency survey or a site survey.

Independent valuation

You must provide an independent valuation for the buildings, land or heritage items. It must also demonstrate that the price you propose to pay represents its market value.

For applications which include capital works

Project timetable

You must provide a timetable covering the whole of your project. It should also include references to key events and milestones.

Project cash flow

You must provide a complete overview of the cash flow of your organisation throughout the duration of your project.

Income and spending forecasts

These should cover the duration of the project and five years after the project ends.

Project management structure

This document should explain the management structure of your project. It should also include decision-making processes, lines of communication and reporting.

A spreadsheet detailing the costs you outlined when completing the project costs section. These should be supported by professional advice and quotes for work.

Briefs for commissioned work

Briefs describe any work you plan to buy in during your project.

If you are commissioning work, for example, from an artist or architect, then you must provide a brief. The brief should describe the works, how long they will take, how much they will cost and the skills required.

Proof of ownership

Copies of deeds, leases, mortgages or other proof of ownership for the buildings, land or heritage items. This could be Land Registry ownership documents, or a lease or heads of terms.

Partnership agreement

If applicable, a partnership agreement. This document should outline all partner's roles and responsibilities and should be signed by all parties. This document should reflect the needs of your project and you may need to seek independent advice on how to best write an agreement.

Receiving a grant

This guidance sets out how you will receive your grant from the National Heritage Memorial Fund. It also explains what we expect of you before, during and after receiving it.

Introduction

After you have been awarded your grant, it is important to understand the next steps you must take. You will need to read and understand the requirements outlined in:

- this receiving a grant guidance
- the [application guidance](#)
- your grant contract

This will help you ensure our contractual conditions are being met. You must also address any issues or concerns that we identify during the delivery of your project.

If you have any questions or concerns, please [contact us](#).

After your grant has been awarded

Getting permission to start

Once you have signed your grant contract and returned it to us, you will be able to get permission to start by submitting a form through your online account. You should not start your project until you have received our approval through permission to start. If you do start before receiving our approval, this will be at your own risk. We will not make any grant payments until this has been approved.

You will need to send us some supporting documents along with your permission to start form.

For all projects, these include:

- proof of partnership funding
- a detailed project timetable which shows a realistic timescale for achieving the approved purposes, including any additional conditions set out in the Grant Notification letter
- a detailed project management structure, including a description of how you will organise and manage your project
- your bank account details, including a copy of a recent bank statement from within the last three months, or a cheque or paying-in slip for the relevant account which shows the bank's name and address. We will pay your grant by bank transfer (BACS). The grant can only be paid to the organisation named in the Grant Notification letter.
- proof of any partnership funding you have in place

For capital works projects, these also include:

- a cost breakdown, including any amounts allowed for VAT and contingency
- a cashflow which shows the planned timing of your income, including grant payments, any partnership funding and expenses over the life of your project. We normally retain 10% until your project is completed.

- an outline of your methods for choosing and procuring goods, works and services
- proof of ownership. If your application is successful, we expect you to own any buildings, land or heritage items on which you spend the grant. This could include:
 - freehold or leasehold of a property
 - ownership of a heritage item
 - copyright on any digital material or a formal agreement with the copyright owner to use the material

In the instance that you are a non-public body and your project involves capital works, it is our policy to take a charge over the grant-funded property.

If you are a public body such as a local authority or a university we will require a restriction on your Land Registry title to ensure you seek our consent before entering into any future transactions relating to the grant funded property.

If any of the above applies to your project, you will need to send us your solicitor's contact details as soon as possible if you are awarded a grant.

We will use the documents you supply with the permission to start form to help us monitor your project's progress. We will normally pay only towards costs incurred after you have obtained our permission to start.

If you have already sent us any of these documents, you will need to make sure they are up to date and provide the most recent version, if applicable.

We ask you to sign a declaration with your permission to start form for our records and we will return a copy signed by us to you. The person signing this declaration must have the authority to do so. By signing the declaration, you are confirming that your organisation understands and accepts the grant award along with all the associated contract requirements.

Once the permission to start form is completed, send a copy to us for approval. Once we have approved this form, you will be able to begin your project.

How we will pay your grant

Once you have our permission to start and have begun your project, you can request payment of your grant from us.

How we will pay your grant depends on the type of work your project will undertake.

For acquisition projects:

- we will pay the full grant amount needed for the purchase in a single payment
- you must supply an invoice for the full purchase cost of the acquisition with this Payment Request

For projects involving capital works:

- we will pay your grant in instalments after each phase of the work is completed
- you will submit a payment request and a progress report for each payment claim
- we will retain the last 10% of your grant until we are satisfied that all our requirements have been fulfilled and that your project is complete the project is finished. We call this your payment limit. This usually means that:
 - you have met all our standard terms of grant and any additional grant conditions
 - appropriate funding acknowledgement is in place
 - we are satisfied that your project is complete

Providing proof of costs

You must include all relevant copies of accounts, bank statements or invoices with your Payment Request.

You must provide invoices for all expenditure. All invoices submitted to us should be for eligible works towards the project we have agreed to fund. They should also be clear, readable and not damaged or tampered with.

Retain all original receipts and invoices and keep proper up-to-date accounts and records.

All proof of costs must be dated after the grant award date and before the grant expiry date shown in the Grant Notification letter. If invoices include costs which are not part of the agreed costs, you will need to deduct these from the invoice when making your claim. We reserve the right to refuse payment of invoices which we consider do not form part of the original agreed project.

Additional costs and income information

Payment percentage

The proportion we pay against invoices, calculated by dividing the grant award by the agreed costs which excludes any volunteer labour or non-cash contributions.

VAT

Our grant percentage will include your VAT payments if these were included in the approved costs for your project. If included, VAT must be clearly shown on all quotes. VAT cannot be paid on certain types of work or may be paid at a lower rate – it is your responsibility to approach HM Revenue & Customs to understand VAT and VAT rates. You must do all that you can to:

- make your project VAT-efficient
- make sure that VAT is applied only to relevant parts of your project
- claim back any VAT where possible

If your VAT status changes during your project we will reduce our contribution to the costs where you have been able to claim back the VAT and you will need to return this to us. If you spend less on VAT, you can ask our permission to transfer the underspend to another cost heading. You will need to demonstrate a clear need for this change.

Contingency allowances for unexpected expenses

You can only use this allowance where unforeseen circumstances have affected the costs of individual elements of the approved purposes. You must get our permission for major spending of the contingency against any individual elements. We will reduce your grant by the proportion of the contingency that you did not need to spend.

Increases or decreases in the approved cost

The costs of the project may increase or decrease. Where a project's costs increase during the course of the project, we will only consider increasing your grant in exceptional circumstances. In this case you will have to provide further information. If the final cost of your project is lower than the agreed cost, we will reduce your grant in line with the agreed overall grant percentage.

Updating the Memorial Fund on your progress

As part of our requirements, you must report regularly on your project's progress. We normally expect to receive a Progress Report every three months.

You can submit Progress Reports on your online account. You must complete a Progress Report along with each Payment request you submit.

We may decide to reduce or increase the frequency of your Progress Reports depending on how well the project is progressing.

This does not apply to acquisition projects. If your project is an acquisition, you will only have to report to us when you complete your project.

What you will need to tell us

In your Progress Report, you will need to give us updates on how your project is progressing in a number of different areas.

This includes:

Your Approved Purposes

Provide a summary of your progress against each of the approved purposes of your grant. These are the purposes for which you have been offered a grant and how you plan to carry them out as set out in your application and confirmed in your Grant Notification letter, as well as any additional information as set out in the permission to start form and subsequent correspondence.

Any additional grant conditions

Provide a summary of your progress towards meeting any additional grant conditions.

A summary of any risks or issues

Provide is a summary of risks you are facing or issues arising with your project.

Any changes to your project timetable

You must explain any significant delays to your project's delivery, and how you plan to make up the time so that the project finishes by the grant expiry date. We

may agree changes to timetables if appropriate.

A partnership funding update

You must explain any changes to your funding sources. Make sure to keep your cashflow table up to date.

A report on how you are selecting consultants, contractors and suppliers (capital works projects only)

You must get at least three competitive tenders or quotes for all goods, work 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.

Procedures to recruit consultants and contractors must be fair, open and keep to the relevant equality legislation. We will ask you to give us details of the procurement, tendering and selection process for all parts of your project.

If you have already procured goods, works or services, you will need to tell us how. We cannot pay your grant if you have not followed the correct procedure.

Depending on the nature of your organisation and project you may be required to comply with UK Procurement Legislation.

If you are unsure about your obligations regarding procurement, we advise you to take professional or legal advice.

Any professional fees

Provide a summary of any fees. Fees should be in line with professional guidelines and should be based on a clear written specification.

Any changes to the Agreed Costs

Your approved costs are the costs we have agreed to contribute towards as set out in your Grant Notification letter. You must complete the Changes to Agreed Costs table in your Progress Report form if you wish to seek agreement from the Memorial Fund to change the approved purposes, grant award or grant percentage.

Images and other supporting information

Over the duration of your project, you should be able to provide at least five high resolution digital images. These might include photographs, maps or other documents which illustrate the project. If relevant, you should provide photos that show your project before, during and after it is finished.

If relevant, you should also supply links to any relevant online information about the project, for example social media or websites.

Make sure you have all the permissions required to share these with us, as we may use any images to promote your project.

Receiving your final payment and completing your project

How you will complete your project will depend on the type of project you are undertaking.

For projects acquiring buildings, land or heritage items:

- you will usually claim the full amount of your grant immediately
- we will authorise payment of your grant when you can evidence that your project is complete
- you must supply an invoice for the full purchase cost of the acquisition with this Payment Request

For projects involving capital works:

- you will send us a Payment Request and progress report at different stages during the project
- we will pay your grant in instalments after each phase of the work is completed, retaining the final 10% until we are satisfied that your project is complete
- when your project is complete you will give us a final update and claim the final part of your grant

Once you have made your final Payment Request, we will not accept any further requests for payments. You should agree your final accounts with your contractors and suppliers before you apply for the final grant payment.

Once your project is complete, we will regularly check that the heritage remains protected and accessible, and that you are continuing to acknowledge our funding. This is to ensure our contractual conditions are being met.

Clawback

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 the future, you must ask for our permission and we may clawback all or part of our grant.