

**BOROUGH COUNCIL OF KING'S LYNN & WEST NORFOLK**

**KING'S LYNN AND WEST NORFOLK AREA MUSEUMS COMMITTEE**

**Minutes from the Meeting of the King's Lynn and West Norfolk Area Museums Committee held on Monday, 4th March, 2019 at 3.00 pm in the Council Chamber, Town Hall, Saturday Market Place, King's Lynn PE30 5DQ**

**PRESENT:** Councillor Mrs E Nockolds (Chairman)  
Councillors A Bubb, M Chenery of Horsburgh, Mrs E Nockolds, T Smith,  
J Westrop and Mrs S Young  
Mrs S Thompson, Chairman of the Friends of Lynn Museum

**Officers:** O Bone, R Hanley, M Saganowska, A Tullett – Norfolk Museums Service

**1 APOLOGIES FOR ABSENCE**

Apologies for absence were received from Councillors D Buck, H Humphrey, A Tyler and J Ward.

**2 MINUTES**

The notes from the meeting held on 3 December 2018 were agreed as a correct record, subject to the following amendment:

Page 6: second set of bullet points – 3 be amended to read:

“The Friends of Hardwick Cemetery had been successful in obtaining a grant for a Baines Memorial.”

**3 MATTERS ARISING**

The Assistant Head of Museums advised that Christine Marsden, Kick the Dust Project Co-ordinator would attend the next meeting on 17 June 2019 to give an update on the project.

**4 DECLARATIONS OF INTEREST**

Councillor Chenery declared an interest as a trustee of the Norfolk Records Office Charity.

**5 REPORT OF THE ASSISTANT HEAD OF MUSEUMS**

The Assistant Head of Museums provided an update on the changes to the Heritage Lottery Fund now called the National Lottery Heritage Fund. A copy of the document is attached to the minutes.

The Assistant Head of Museums and Curator, Lynn Museum presented the report which provided information on the King's Lynn Museum activities for the period from November 2018 to January 2019.

The visitor numbers were tabled and discussed. It was highlighted that the figures had increased in 2019, for the same period in 2018. Officers reported that it was anticipated that the total number of visitors at year end would exceed the previous year.

The Assistant Head of Museums responded to questions and comments relating to:

- Thomas and Henry Baines exhibition at the Lynn Museum in the summer of 2020 and potential to linking of sites within the town via a trail.
- Green Pilgrimage interreg project.
- 2019 Journeys, People and Place Pilgrimage.
- Current exhibition at the Lynn Museum – Animal ABC from Ammonite to Zebra.
- Iron Age Snettisham Hoard.
- Annual Easter pilgrimage from the Ouse to Walsingham. It was noted that the pilgrimage would be filmed and used for the 2019 Journeys, People and Place Pilgrimage exhibition.
- School holiday programmes and levels of attendance.
- Seahenge souvenir publication was yet to be completed and once printed would be available to purchase in the museum shop in 2019.

The Chairman, Councillor Mrs Nockolds informed Members that a new light projection show was currently being displayed on the Custom House which had been researched and designed by the pupils who were home education and would be available to view for an additional week. The Chairman, Councillor Mrs Nockolds thanked the staff at the Lynn Museum and Trues Yard as the group informed her that they very much appreciated the support they received from the staff of both museums.

The Chairman of the Friends of Lynn Museum provided an update, the details of which were set out at section 3 of the report. The February Newsletter had been circulated to the Committee for information.

In response to questions regarding the legacy of £500, the Chairman of the Friends of Lynn Museum advised that the Friends wished to purchase a specific item which had to date not yet been identified by Lynn Museum.

The Chairman, Councillor Mrs Nockolds thanked the Assistant Head of Museums and the Curator for an interesting report.

Councillor Smith referred to an article in a railway magazine relating to the 1912 Hunstanton to King's Lynn railway line. Councillor Smith to email O Bone details.

Councillor Mrs Westrop made reference to The Richard III Society and the annual 3 day international conference being held at the Dukes Head in King's Lynn on 4 to 6 April 2019 which would focus on King's Lynn and Hanseatic Ports.. Dr Paul Richards was a speaker. It was **agreed** that O Bone would contact R Williams to see if any contact had been made by the organiser. Councillor Mrs Westrop to forward details to the Democratic Services Officer to circulate to the Committee.

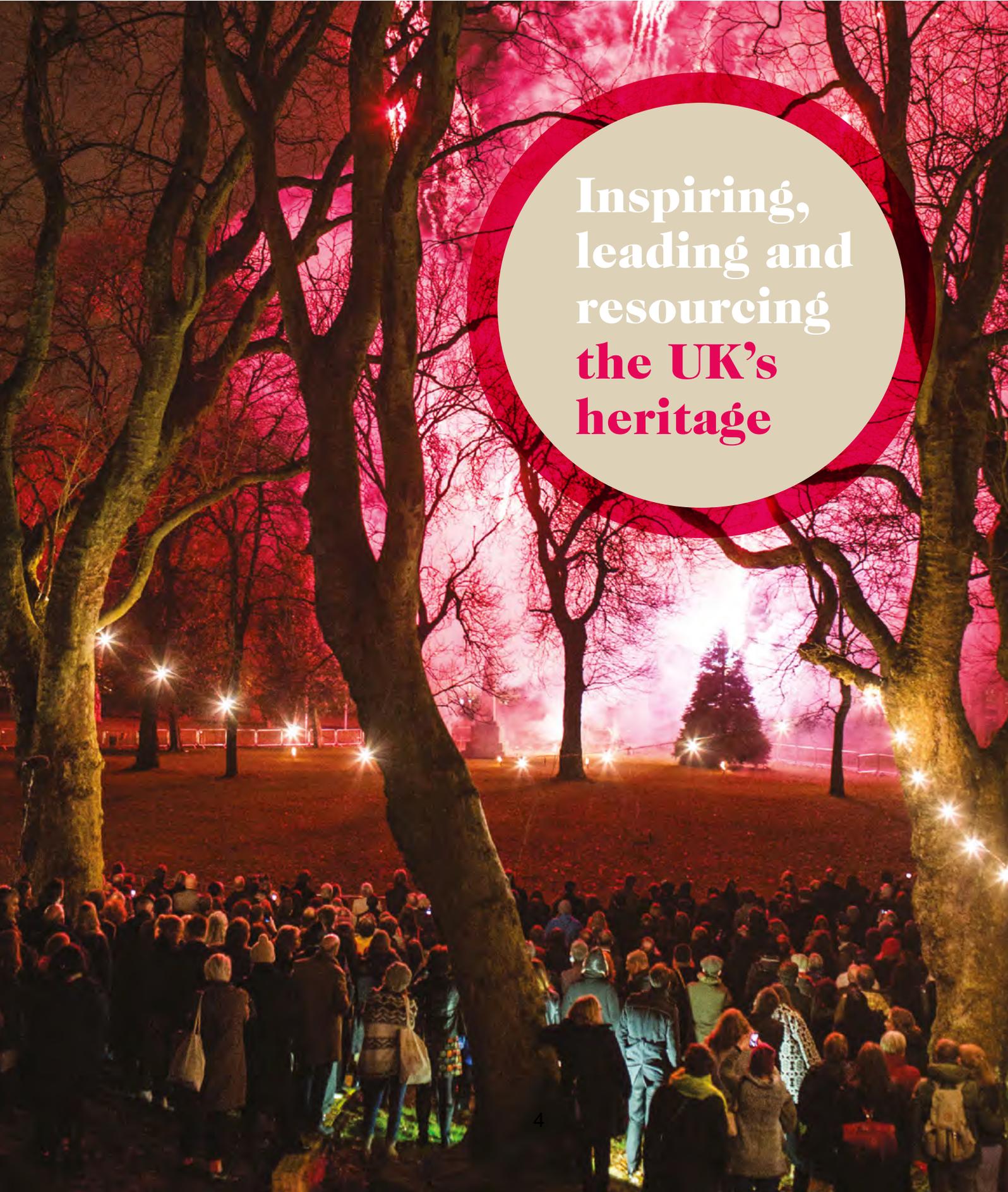
The Committee received an overview of the work which had been undertaken during 2018 and 2019 by the Teaching Museum trainees, Andrew Tullett and Monika Saganowska which were funded through the Norfolk Coastal Treasures project.

On behalf of the Committee, the Chairman, Councillor Mrs Nockolds thanked the trainees for all the valuable work which they had undertaken during their time with the Norfolk Museums Services and wished them both well and every success for their future careers.

## 6 **DATE OF NEXT MEETING**

The next meeting of the King's Lynn and West Norfolk Area Museums Committee would be held on Monday 17 June 2019 at 2.15 pm in Lynn Museum, Market Street, King's Lynn.

**The meeting closed at 4.17 pm**

A large crowd of people is gathered in a park at night, watching a fireworks display. The scene is illuminated by the warm glow of the fireworks and the lights of a Christmas tree in the background. The trees are silhouetted against the bright sky.

Inspiring,  
leading and  
resourcing  
**the UK's**  
**heritage**



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## Acknowledgements

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**Front cover**  
**The 21st Century**  
**Gallery in the Park:**  
**Extending Access**  
**to the Whitworth's**  
**Collections**  
University of  
Manchester

**Left**  
**Flow to the Future:**  
**connecting people**  
**and peatlands**  
RSPB Scotland

# Foreword

## Sir Peter Luff, Chair



Everything we do for the heritage of the United Kingdom is made possible by National Lottery players. So we must spend their money wisely and the projects we support must bring benefits to them and their communities. This demands of us an absolute commitment to diversity and inclusion. Heritage defines what we all are. It must be accessible to everyone.

Heritage illuminates history. It includes buildings and landscapes, museums and memories, objects and species, but we do not define or limit its scope. While our work is informed by experts, we ask people to decide what they value from the past and wish to hand on to the future. That is the heritage we support.

Bringing heritage into a better condition and making it fully accessible to diverse audiences brings a host of wider benefits. These include developing skills and improving wellbeing, boosting local economies and creating jobs, sustaining biodiversity, and encouraging a sense of identity and belonging.

Our approach is probably best summed up by the phrase, "It's not enough to save something – you've got to make it live". That's because a living heritage is most likely to be sustainable and to bring greater benefits to people and communities.

This new Strategic Funding Framework marks a significant new direction for us. It's secured on the foundations of the Heritage Lottery Fund's quarter-century of experience, extensive research and the Tailored Review of the Fund conducted in 2017. It also reflects the need to respond to a changing environment, including less certainty in our income and changing expectations in society. So, like the heritage we support, this strategy itself must live and evolve to face these challenges.



We will continuously monitor the effectiveness of our new approach, consulting with all our partners as we do so, and make the changes necessary to deliver our vision and ambitions.

Improving the condition of our heritage remains one of our prime objectives. But we will be doing many things differently from now on.

## “We will seek to make National Lottery players’ money work even harder”

Firstly, we are changing the way we work to make us more devolved and better resourced. Our new organisational structure will enable us to inspire and lead the heritage sector. It addresses new challenges, such as the impact of digital technologies, and will also allow us to resource the new priorities set out in this strategy.

Secondly, we are making it easier for applicants and all our partners to work with the Fund. We are simplifying our processes and the outcomes we look for in projects, while taking our work closer to the communities we serve.

This should also speed up decision-making and help our outstanding staff to do an even better job for the heritage of the United Kingdom.

Thirdly, we will seek to make National Lottery players’ money work even harder. Grant-making will remain our most important function, but we will look for new ways of doing business, embracing loans and social investment models in our portfolio of financial assistance to heritage organisations and their projects.

Finally, we are changing our name to make the link with the National Lottery more explicit. This, we hope, will encourage more people to play as they see more clearly the amazing things their money achieves.

### **Welcome to the National Lottery Heritage Fund.**

# Ros Kerslake,

## Chief Executive



Over the next five years, we expect to invest around £1.2 billion in the UK's heritage. This is a huge opportunity to build on the past 25 years of achievement, and a great responsibility. Our ambition for the money raised by National Lottery players is to inspire, lead and resource the UK's heritage to create positive and lasting change for people and communities.

What will this mean in practice? We will stand up for the enormous good that heritage delivers for society, using our evidence and experience to be a strong advocate with national and local government and other agencies. We will support the capacity and resilience of the heritage sector as a whole, and encourage innovation and collaboration, including working across sectors with a wider range of partners. We have set ourselves six objectives to capture the impact of National Lottery investment in heritage up to 2024 and we will regularly measure our progress against these.

By investing a proportion of our income, initially small, in social investments (for example through loans and impact funds) we will recycle some of our funding and increase our impact. We will build capacity in organisations to take advantage of repayable finance, and use additional investment to grow the overall 'pot' available for heritage.

Encouraged by the recommendations of our recent Tailored Review, we will expand our activity in other areas too. We will support heritage organisations to engage internationally and benefit from exchanging knowledge and skills. We will build digital capabilities in the sector and in our own organisation, including sharing our data openly. We will invest proactively in other strategic opportunities such as dynamic approaches to collecting, and enterprising approaches to revitalising heritage at risk, through occasional

This Strategic Funding Framework for 2019–2024 sets out our vision and the principles that will guide our National Lottery investment for the next five years.

It's an ambitious framework rather than a rigid plan. We are introducing new strategic directions and ways of working to support and strengthen the UK's heritage through uncertain times, and will respond flexibly to changes and opportunities as they arise.

When we started developing our strategy, we asked players of the National Lottery what the 'good causes' money should achieve for heritage and people. Their response was both inspiring and challenging. Our established principles of supporting the full breadth of heritage UK-wide and ensuring that heritage is enjoyed by the widest range of people were resoundingly endorsed by the players. This position also remains strongly supported by the general public and the customers and stakeholders who responded in detail to our consultation. We will continue this overarching direction that, since 1994, has enabled many thousands of successful heritage projects to achieve fantastic results, transforming communities across the UK.

# Overview

UK, country or local campaigns, and innovation and partnership funds.

Our customers and stakeholders have called for maximum flexibility in our funding, and we are responding with a radically streamlined grant-making portfolio. This delivers the vast majority of our funding through National Lottery Grants for Heritage, an open programme for any type of heritage project from £3,000 to £5 million. We have simplified our application processes and requirements, including introducing single-round grants up to £250,000. Our customers will see some immediate improvements to our online processes, with more significant changes to follow from 2020 as we modernise our digital grant-making systems. This aims to make the experience of working with us as efficient and straightforward as possible.

## **“We will stand up for the enormous good that heritage delivers for society”**

We are making changes to our organisation too. We are already heavily devolved in our grant-making, with local decisions on grants up to £2 million. We strongly believe these investment decisions should be taken by people who live or work in the areas and communities that benefit, and who understand the different strategic needs and distinctive character of the heritage across the four countries of the UK. For the first time we will delegate all funding decisions up to £5 million to committees in Scotland, Northern Ireland, Wales and three new geographical areas in England – North; Midlands and East; and London and South. This will amount to around 80% of our annual budget, compared with around 45% under the current strategic framework.

We will continue to provide great support for applicants, with a wider range of accessible and helpful digital resources. We will provide targeted help to higher priority applicants who are under-represented in our funding, and to those applying to us for the first time, to support them in achieving their aspirations. By investing in technology we will be able to work more locally with communities, with a wider network of office and staff locations across the UK supporting our devolved governance structure.

The success of the National Lottery is critical to achieving our vision across the UK. Our new name and brand uses the highly recognisable National Lottery crossed-fingers logo to strengthen the association between play and the heritage cause, and to raise awareness of the tremendous impact for heritage and communities that this significant investment delivers. Everyone benefits from a thriving National Lottery and the National Lottery players we consulted were enthusiastic advocates for promoting this good news more clearly. As one participant in a workshop at Beamish Museum observed:

“I had no idea where my money is going to, when I play the [National] Lottery. And if I'd realised it's been spent for heritage in the way it is, I'd buy two tickets. Buy more tickets, give more money to the heritage funding. It's not only our future, it's our children's future, grandchildren's future.”

# Our vision and ambition for 2019–2024





Pages of the Sea,  
Downhill Beach, Derry  
14-18 NOW

# A flexible framework for the four countries of the UK

## National and local

The National Lottery Heritage Fund is unique in covering the full breadth of natural, cultural and intangible heritage, across the UK. Since 1994, National Lottery grants amounting to £8 billion distributed to more than 44,000 projects have sustained and transformed the UK's heritage. Through the scale of this investment we've had significant influence over 25 years, driving an inclusive and democratic approach to heritage which is widely supported by National Lottery players and the public.

strategic partners to ensure that the value of heritage and its contribution to civic life and communities is fully understood. Under this Strategic Funding Framework, our business delivery, governance and investment decisions will be even more devolved.

**“We take account of different policy priorities in the four countries, and the strategic roles of other agencies”**

Our UK-wide operation and regional and country presence enable us to work strategically with governments and a wide range of partner organisations. At the same time, we're also closely engaged with people and communities looking after and celebrating their heritage at a local level. Within our framework, we take account of different policy priorities in the four countries, and the strategic roles of other agencies. From 2018–19, we have new Policy Directions for the UK, Scotland, Wales and, for the first time, England. We work closely with local government and other local



Right  
Hull City of Culture 2017  
Hull UK City of Culture 2017 Ltd

## “All decisions up to £5m under National Lottery Grants for Heritage will be taken locally”

All decisions up to £5 million under National Lottery Grants for Heritage (see page 32) will be taken locally, with our UK Board deciding on UK-wide strategic interventions and major awards over £5 million.

### Responsive and strategic

Through our new, simpler funding portfolio and commitment to innovation and collaboration, we will have a flexible funding offer over the next five years that is responsive to national and local circumstances. We will take account of the priorities and activities of other agencies, strengthening and deepening our partnership working to add value to National Lottery investment and attract additional capacity, expertise and resources for heritage.



# Our vision and role

**“Inspiring, leading and resourcing the UK’s heritage to create positive and lasting change for people and communities, now and in the future”**

## **The story so far...**

Over the last 25 years we have been the largest dedicated grant funder of the UK’s heritage, making “a lasting difference for heritage and people”. We have driven a progressive and inclusive approach, enabling organisations to transform their heritage offer to the public and allowing a much wider range of people to take part in heritage activities. Investment from the National Lottery has brought about a renaissance in our national heritage, transforming many of our great institutions as well as reaching into every community in the land, improving daily lives for millions.

## **Our vision for 2019–2024**

Over the next five years, we will build on this track record of achievement. We aim to be a strong thought leader and change-maker for the full breadth of heritage. We want to demonstrate and champion the impact and benefits to society that heritage achieves, and attract investment and support from others. We want heritage to be more widely recognised as a vital contributor to the economy, social cohesion, better places and individual wellbeing.

## **Our role**

After a decade of reduced public spending, the financial environment for heritage remains challenging. We will champion innovation in business models, and build capacity, skills and resilience in heritage organisations to enable them to diversify their income.

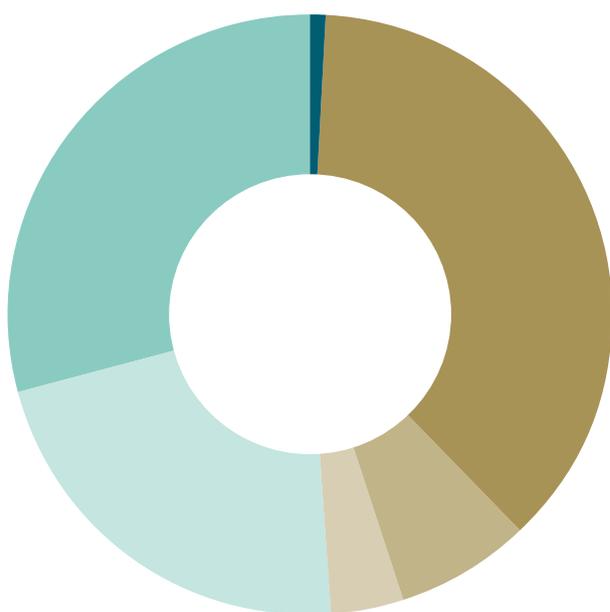
We will move beyond grant funding, investing National Lottery income as grants, loans or other financial interventions, where they will best respond to strategic needs. We will maximise our impact through recycling some of our income, as well as leveraging investment in heritage from others. We will build strategic partnerships and collaborations, inspire and support innovation and champion the resilience of the heritage sector.

We will provide leadership and support, drawing on our 25 years of experience delivering heritage projects, from small community celebrations to multi-million pound, multi-year capital developments. Alongside those agencies with responsibility for sector development, we will convene opportunities to network and collaborate, using our data and research to share learning and best practice. We’ll also support organisations to measure and demonstrate their social impact through heritage.

**Top right**  
**St Mary at the Quay, Ipswich Churches Conservation Trust**



**National Lottery funding by heritage sector since 1994**



**Heritage Area**

- Historic buildings and monuments **37%**
- Industrial, maritime and transport **7%**
- Intangible heritage **4%**
- Nature and landscapes **22%**
- Museums, libraries, archives and collections **29%**
- Community heritage (introduced as a category in 2012) **1%**

## **Our strategic objectives**

We are setting six specific objectives with key performance indicators (KPIs) for this Strategic Funding Framework to support better evaluation of the impact of National Lottery investment. See page 48 for more detail.

# **“We are setting six specific objectives with key performance indicators (KPIs) for this Strategic Funding Framework”**

## **We will:**

- continue to bring heritage into better condition
- inspire people to value heritage more
- ensure that heritage is inclusive
- support the organisations we fund to be more robust, enterprising and forward looking
- demonstrate how heritage helps people and places to thrive
- grow the contribution that heritage makes to the UK economy.

## **The contribution of National Lottery players**

Our income is raised by people playing the National Lottery, and we set our budgets for investment annually depending on the returns it generates for heritage good causes. In order to ensure that the National Lottery continues to thrive, it is increasingly important to champion public awareness and recognition of its vital role in a healthy and vibrant civil society.

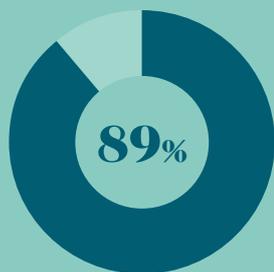
In this Strategic Funding Framework, we will support those we fund in strengthening the National Lottery branding of their successful projects and look for new ways for its contribution to be promoted and acknowledged. In 2019, as 25 years of National Lottery funding is celebrated, we anticipate key heritage partners and projects contributing to a strong National Lottery heritage funding story, with promotional plans to mark this. We will encourage – and, where appropriate, collaborate on – higher profile promotion and publicity plans as an integral part of National Lottery-funded heritage projects. This includes delivering opportunities to thank, acknowledge and involve the people who contribute by buying tickets.

**Top right**  
**Punk in Walsall: life and legacy**  
Walsall Creative Factory

**Middle right**  
**Mary Rose Museum, Portsmouth Historic Dockyard**  
Mary Rose Trust

**Bottom right**  
**Brompton Cemetery**  
The Royal Parks,  
London

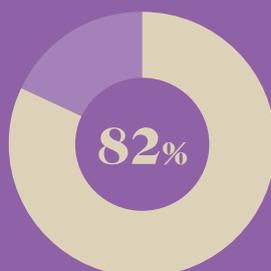
We have received significant support for our objectives. For example, based on our YouGov survey of over 10,000 UK adults in 2018:



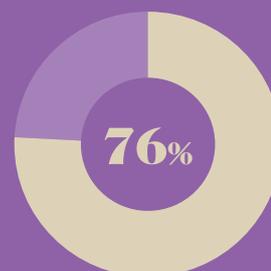
**89% agree** heritage should be enjoyed by as wide a range of people as possible



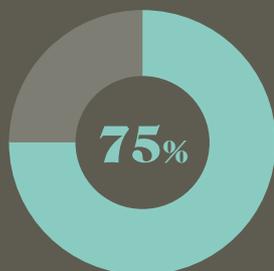
**82% agree** heritage should have a strong social benefit in local areas, helping people and places to thrive



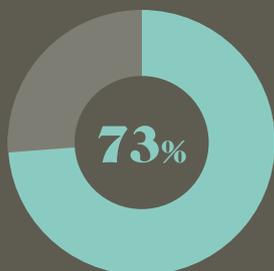
**82% agree** people should be inspired to value heritage more



**76% agree** heritage should be brought into better condition



**75% agree** heritage should be enterprising and forward looking



**73% agree** heritage can have a significant effect on the economy



# The full breadth of heritage

The National Lottery Heritage Fund will continue to fund the full breadth of heritage across the whole of the UK, enabling people to define heritage for themselves, so that what they value can be enjoyed and passed on to future generations. This scope and reach is essential to our role as a distributor of National Lottery funding for heritage, and our approach is recognised as having made heritage more democratic and widely appreciated than before.

**“Our approach is recognised as having made heritage more democratic and widely appreciated than before”**

## Heritage at risk

Our funding plays a vital role in conserving, protecting and passing on heritage of all kinds which is at risk of loss, damage or neglect.

Our understanding of the ways in which heritage might be considered at risk is broad. It includes:

- heritage that is likely to be lost, damaged or forgotten
- heritage that is designated as 'at risk'
- physical heritage sites that are decaying or neglected
- heritage at risk due to financial difficulty
- intangible heritage and cultural practices that might be lost
- important habitats and species in decline.

Consideration of whether the heritage is at risk will continue to be an important factor in our decision-making.

## Heritage in the four countries of the UK

Our strategic consultation confirmed that there is broad support from across the UK for our proposals. When we asked how we should take account of different priorities in the four countries, respondents favoured recognising local needs or plans. Projects should either align with those objectives, or we should ensure that we consult with local experts or those 'on the ground'. This is reflected in how we respond to Policy Directions issued to us by each government.

Our consultation on priorities for heritage highlighted much similarity, but also some differences, between the needs of England, Scotland, Wales and Northern Ireland. The top three areas of need across the UK were recognised as:

- natural heritage and biodiversity
- connecting local people with their heritage
- built heritage.

Within these, natural heritage was a slightly stronger priority for the three countries outside England. Our role in supporting the capacity and resilience of the heritage sector was seen as important across the UK, and this was also slightly stronger in Scotland, Wales and Northern Ireland.

**Top left**  
**Tomintoul and Glenlivet Hidden Histories Landscape Partnership**  
Cairngorms National Park Authority

**Top right**  
**Wildlife Skills Scheme**  
Wiltshire Wildlife Trust

**Bottom left**  
**Bats in Churches**  
Natural England

**Bottom right**  
**Islington's Pride LGBT+ Archive**  
London Borough of Islington



# Dame Seona Reid

## Chair, Committee for Scotland

From iconic landscapes and rare species to important museums and galleries; from rich cultural traditions to historic townscapes and our industrial past, heritage is central to Scotland's identity. It is also understood to have an important role to play in its future. The National Lottery has made a major difference to Scotland's heritage since 1994, both through capital investment in its infrastructure and by bringing heritage to life for a very wide range of people.

### **“Heritage has the power to transform the lives of people and communities in Scotland”**

With a third of the UK land area and two-thirds of its coastline, it's no surprise that recent consultation identified natural heritage as Scotland's top heritage priority. This is followed by community heritage and built heritage, with an underpinning commitment to engage less privileged and excluded communities. The flexibility of this new Strategic Funding Framework will enable us to respond to these priorities, and to opportunities and strategic partnerships which are distinct to Scotland.

The emerging Environment and Culture Strategies for Scotland place heritage at the heart of cross-cutting themes, including the role of heritage in place-making. They also recognise its potential to improve community cohesion, contribute to community empowerment, promote inclusion and enhance health and wellbeing. We will work in collaboration with heritage sector bodies, local

and national government, social enterprise, tourism, arts bodies, local communities and others to make the most of the opportunities that arise from more interconnected working. In doing so, we are committed to supporting the sector to become more resilient, build capacity, develop skills and encourage innovation and the exploration of new approaches.

We will build on recent initiatives such as Scotland's Great Place Scheme and our response to Scottish Government Themed Years with dedicated National Lottery funds, most recently the Year of History Heritage and Archaeology and the Year of Young People. Forthcoming Themed Years relating to Coasts and Waters (2020) and Scotland's Stories (2022) both offer great potential for future collaboration.

Heritage has the power to transform the lives of people and communities in Scotland. And the National Lottery Heritage Fund has a major role to play – a role we embrace enthusiastically.

# Scotland



# Wales



# Baroness Kay Andrews

## Chair, Committee for Wales

The heritage of Wales is diverse, complex and immensely rich. Our country has a profound sense of place – whether that is in the valleys of South Wales, the wild landscapes of Snowdonia or our fabulous coastline. Our rural and urban landscapes and townscapes and their different communities, different cultures and languages all contribute to our distinctive Welsh identity.

**“Different cultures and languages all contribute to our distinctive Welsh identity”**

At the National Lottery Heritage Fund we celebrate that diversity and recognise the immense changes that have marked our country. We support projects across Wales that put heritage at the heart of the ambitions communities have for a richer and more resonant future. We do this by investing National Lottery funds in powerful partnerships between heritage organisations and other local agencies to help create better places to live and work. In short, we help to put culture and heritage where it should be – at the heart of sustainable regeneration and resilient communities.

Our work recognises what we all know instinctively: that what makes people and communities thrive is a sense of involvement, identity and belonging. Those connections often grow most powerfully when people both value and relate confidently to their own culture, history and heritage – whether that

is found in language and customs or by cherishing and caring for historic buildings, landmarks, parks or natural habitats. We aim to inspire such confidence in the projects we support.

When communities become involved in conserving or enhancing their own heritage it can bring manifold benefits – everything from better health, to better skills, better jobs and greater wellbeing. For young people, or for poorer communities, our investment can make a unique difference. Engaging with heritage projects can mean greater success in school or college, and in later life, empowering young people to find their voice and to pursue new interests and skills, all contributing to the goals of the Well-being of Future Generations (Wales) Act.

In Wales we also have opportunities to create unique partnerships, including with the Welsh Government, as evidenced by our involvement and support for the Fusion programme. These partnerships are based in the poorest communities in Wales. Our intention is to promote not only a greater understanding of the value and potential of heritage in all its forms, but also, in partnership with health, housing or child development agencies, to build and extend confidence, knowledge and skills.

**Left**  
Yr Ysgwrn – home  
of poet Hedd Wyn  
Snowdonia National  
Park Authority

# Anna Carragher

## Chair, Committee for Northern Ireland

At the heart of our new Strategic Funding Framework is the recognition that heritage has the power to transform the lives of people and communities, socially and economically. This builds on the work that we have undertaken over the years, transforming Northern Ireland's heritage through our investment of National Lottery funding in landscapes, townscapes, buildings, museums and community heritage, while enhancing and enriching the local Programme for Government's emphasis on wellbeing and inclusion.

**“We recognise the role that heritage can play in building cohesive and confident communities”**

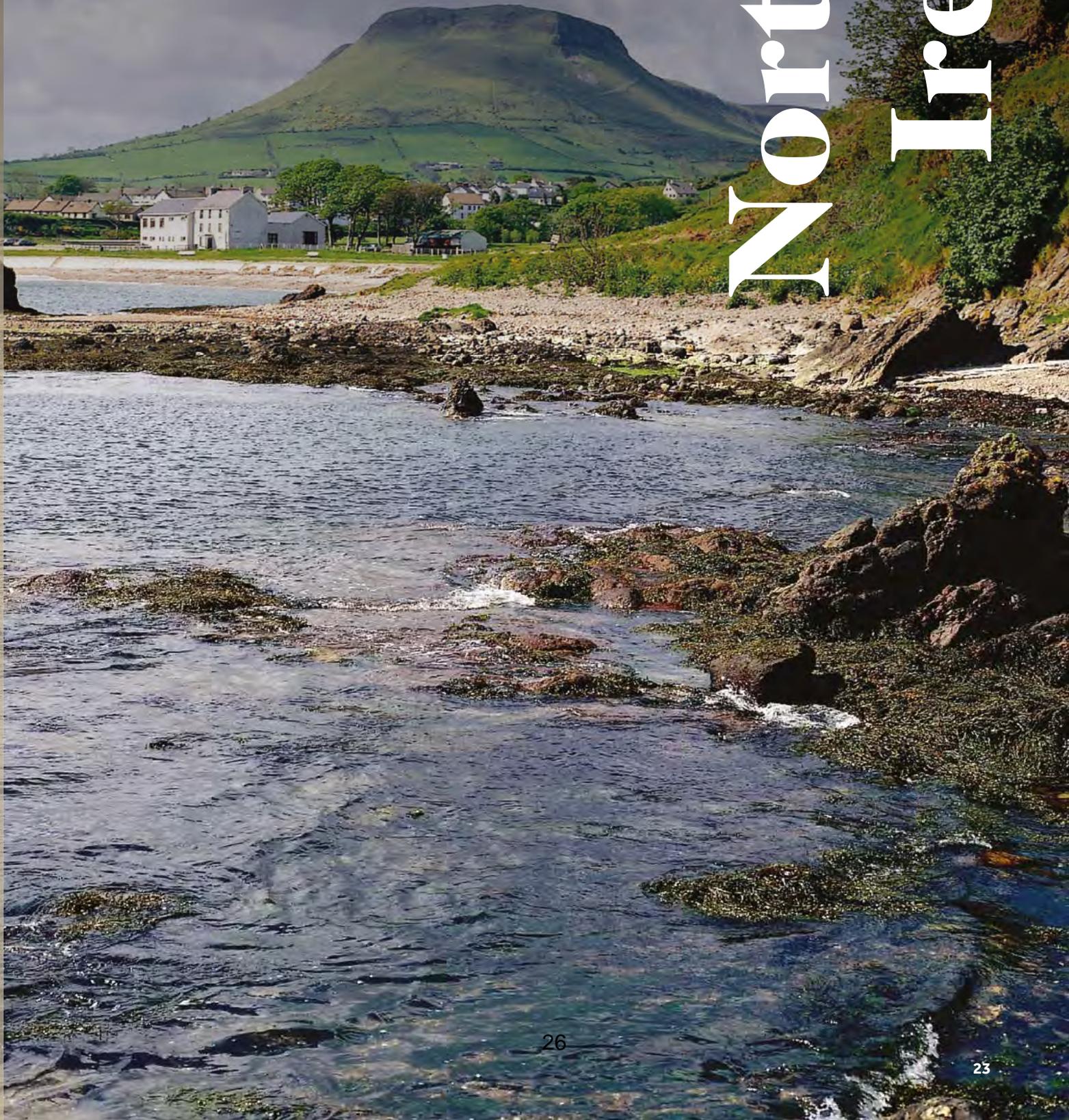
The framework recognises that Northern Ireland faces unique challenges as a society in which heritage and identity are both contested and appropriated. Consequently, we will continue to work alongside museums and other partners to navigate this challenging space and create a better understanding of that past through the recognition of multiple narratives, historical complexity and neglected histories.

We will continue to work towards greater strategic engagement across the heritage sector, building on existing relationships, developing new ones, encouraging innovation and skills development, while recognising the challenges that heritage faces in relation to resilience and capacity building. We'll encourage a more strategic approach to be taken towards oral history and maritime heritage. And we will continue to build on our Decade of Centenaries work and the challenges of commemoration over the period of the new Strategic Funding Framework, which will span the centenaries of the foundations of the state of Northern Ireland, the Republic of Ireland and the United Kingdom.

A further priority will be place-making; at an urban and rural level, our unique landscapes offer particular opportunities. In this work we recognise the role that heritage can play in building cohesive and confident communities, establishing shared spaces and helping communities to function better. We will build relationships with those who can bring about positive change: local and national government, tourism authorities, the social economy sector, communities, and heritage and other groups. In particular, we will engage with excluded and deprived communities, some of whom are new to Northern Ireland.

**Right**  
**The Heart of the Glens**  
**Landscape Partnership**  
Causeway Coast and  
Glens Heritage Trust

# Northern Ireland



# England



# Jim Dixon

## Trustee

England is a wonderfully diverse, exciting and modern nation. From the vantage point of where I live in the Peak District, the scale of England is evident, at least on the clearest days, when you can just about see from coast to coast and for well over a hundred miles north to south. Evident too is the diversity of the landscape, the impact of millennia of human settlement and of modern infrastructure.

**“Heritage can help articulate and bring to life those things that most define people”**

Across the whole of England, the impact of the National Lottery has been striking. The cultural success of the great city of Manchester has been fuelled by major grants such as the award-winning Whitworth Gallery, while on the Cheshire Plain the dish of Jodrell Bank is a grand reminder of the technological heritage that we celebrate and are making more accessible to visitors of all ages. In the valley of the River Derwent, the pioneering mills at Cromford and Derby celebrate the advances of new forms of commerce. In Staffordshire, one of the country's most important war memorials, the National Memorial Arboretum, welcomes visitors in a building funded by National Lottery players.

Far in the distance, on a fine day, Lincoln Cathedral is a reminder of the ancient heritage of our religious buildings, great and small. In Sheffield, a new model of management of the city's parks in partnership with the National Trust is showing that these urban green spaces can have a great future. National Lottery funding has touched everything, from our best nature reserves like Minsmere, Slimbridge and Bempton Cliffs, to the great cathedrals in Durham, Hereford and Canterbury, and to the finest national museums and collections, many in London but many elsewhere.

At a time of great national debate about our identity, a better-managed, more accessible and more acutely interpreted heritage will play an ever-greater role in defining what place means to people. Whether your allegiance is to your town, village or city, your region or your country, or to a sector of society whose beliefs and interests you share, heritage can help articulate and bring to life those things that most define people. And in sharing those parts of our heritage that instil most pride, there is the basis for a thriving visitor economy that in itself creates wealth and breaks down the barriers that can exist between groups of people or nations.

The face of England has been touched, enhanced and made more relevant by our ability to fund fantastic heritage projects, thanks to National Lottery players. Through this Strategic Funding Framework we will continue to play a critical role in supporting the people and communities who want to protect and celebrate their heritage.

**Left**  
**First Light at**  
**Jodrell Bank**  
University  
of Manchester

# Priorities for heritage

Within our broad approach to heritage overall, our consultations with stakeholders and the general public identified two priority areas of focus:

- landscapes and nature
- community heritage.

## Landscapes and nature

Landscapes and nature form the bedrock of our culture and heritage. But over recent years, the scale of nature loss and people's lack of understanding of the importance of nature has become increasingly stark. Never before has the need to aid nature's recovery been more urgent.

We are one of the UK's largest investors in landscapes and nature, and with that comes great responsibility. In this Strategic Funding Framework, we will make sure that the projects we support do their utmost to reduce biodiversity loss, to maintain the beauty and quality of our urban and rural landscapes, and help people to reconnect with the UK's natural heritage.

## “Never before has the need to aid nature's recovery been more urgent”

Whether our funding is conserving a nature reserve, a museum, a public park or a building, we will expect projects to take the opportunity to create positive benefits for nature by, for example, creating roosts for bats, including green roofs, providing ponds for natural drainage and increasing tree planting.

Projects with a focus on nature should demonstrate how they will effectively and strategically help address the key challenges faced by landscapes and nature in the future. We are particularly keen to encourage projects that:

- deliver conservation at a landscape scale and increase people's understanding of the cultural value of landscapes and nature
- deliver more, better, bigger, better-connected and more resilient habitats for nature
- reconnect people to the importance and value of nature to their daily lives
- use partnership working to increase and broaden collaboration, particularly where it engages organisations that may have a direct impact on the future of landscapes and nature
- explore and test new ways of doing things that are scalable and include sharing the learning.

We will continue to help those working to conserve landscapes and nature to develop skills to establish new sources of income, through developing fundraising skills to engage effectively with philanthropists, individual donors, trusts, foundations and business. We will use our convening powers to help inspire and support creative new thinking, fresh ideas for delivering social change, better public engagement and behaviour change to support our natural heritage in the future.

**Top right**  
**Living Sea Wales:**  
**Moroedd Byw Cymru**  
North Wales  
Wildlife Trust

**Bottom right**  
**BAM! Sisterhood**  
The Angelou Centre,  
Newcastle upon Tyne



## Community heritage

We have championed the idea that heritage is what people value and want to hand on to the future, regardless of official recognition or designation. We will continue our strong support for local and community heritage in a number of ways. We have simplified the application process for grants up to £10,000, and will continue to make the majority of our awards (by number) through National Lottery Grants for Heritage £3,000–£10,000, which is designed to be accessible to community groups. New local heritage campaigns (see page 34) may focus on community heritage, for example to encourage applications celebrating a locally important anniversary, a much-loved local building or space, or local heritage heroes.

Any application to us for more than £10,000 under National Lottery Grants for Heritage may now include a community grants scheme, which can give small-scale conservation and activity grants. The scheme, and the activity it funds, can be the main way of achieving the project's outcomes, or it can be a small part of a wider project. We hope this new approach will enable organisations to respond to local need.

Examples of this may include:

- training volunteers at natural heritage sites
- offering local groups funding to take part in a heritage festival
- empowering individual young people to undertake heritage-related social action
- digitising archives held by different organisations and putting them online.

Learning from successful community grants schemes run under previous targeted programmes, we will encourage projects to use an open application process and to involve local people in decision-making.



# Inclusive heritage

## Heritage for all

Heritage has a crucial role to play in contributing to a flourishing, more equitable society in the UK. We will continue to ensure everyone is able to participate in heritage, regardless of their background, personal characteristics or circumstances. There is still some way to go before the sector has a diverse workforce and governance, and the people who visit and benefit from heritage are reflective of UK society. But we want to inspire and support projects to create positive and lasting change, and we are raising our ambition to achieve greater inclusion.

## “We are raising our ambition to achieve greater inclusion”

We will ask every project to achieve our new inclusion outcome: “A wider range of people will be involved in heritage” (see page 32). We will expect all projects to take steps to reach out to new people, to share heritage beyond their organisation, and to embed inclusive practice in a way that is proportionate to the size of our grant and appropriate for the type of project. We will provide new guidance and case studies to help applicants understand how we can help them contribute to making heritage inclusive.

## Addressing under-representation in heritage

Reflecting the priorities of National Lottery players, we will have a particular focus on reaching those millions of people in the UK who are typically under-represented in heritage or who face barriers to being involved. Through our outreach support, we will particularly encourage and enable applications from organisations that work with, and seek to benefit:

- disabled people
- young people
- people from minority ethnic and LGBT+ communities
- people from lower socio-economic backgrounds.

Organisations applying to us for the first time will also be a priority for our help.

We will support these organisations to explore and share their heritage. We'll also expect mainstream heritage organisations to create more opportunities to collaborate with them to deliver inclusive projects. Our expectations of organisations receiving larger grants will be high: strong projects will offer credible and ambitious plans to reach audiences they know to be missing. Projects will be supported to exceed minimum standards for physical and intellectual accessibility.

### Supporting areas under-represented in our funding

Stakeholders are strongly supportive of us addressing under-representation in our funding of geographical areas, with a focus on two aspects:

- areas that have received least funding in the past
- areas that experience deprivation.

Using measures of our spend per capita and standard indices of deprivation, we have identified 13 local authority areas that fulfil both criteria. Our local teams will work strategically with stakeholders, from within heritage and beyond, to identify the best way to support organisations to meet local needs. This will include, if appropriate, soliciting applications for priority heritage projects, and offering micro-grants as successfully trialled in Barrow-in-Furness in 2017.

### The 13 areas are:

- Brent (Greater London)
- Corby (Northamptonshire)
- Enfield (Greater London)
- Knowsley (Merseyside)
- Inverclyde (Scotland)
- Luton (Bedfordshire)
- Newham (Greater London)
- North East Lincolnshire
- North Lanarkshire (Scotland)
- Neath Port Talbot (Wales)
- Rhondda Cynon Taff (Wales)
- Tendring (Essex)
- Walsall (West Midlands)

**Top**  
**Polli:Nation**  
Learning through  
Landscapes Trust

**Bottom**  
**North Staffordshire**  
**Oatcake Obsessions**  
Caudwell Children



# Our portfolio

# 02





# Simplifying our approach

We understand the time and resources that go into making funding applications, and the barriers that a complex portfolio, forms and processes can present to smaller and less experienced organisations.

We want to make the application process as straightforward as possible for the full range of organisations we work with, applying proportionate requirements depending on the scale of our investment. We will continuously improve our online customer experience with shorter, clearer forms and a wider range of digital resources and guidance to help plan high-quality projects.

**“We want to make the application process as straightforward as possible for the full range of organisations we work with”**

## **National Lottery Grants for Heritage**

We have radically simplified our funding portfolio and will offer funding through a single open programme for all types of heritage, with occasional time-limited heritage campaigns and partnership initiatives. Through this single open programme, we will respond flexibly to high-quality proposals of all kinds, from all parts of the heritage sector and from the widest range of applicants. Our application forms, processes and requirements will be shorter and simpler for smaller grants, and we will offer more applicants a quicker decision by increasing the upper limit for single-round awards from £100,000 to £250,000.

For larger grants (£250,000 to £5 million) we will introduce an early 'expression of interest' stage, based on submission of a brief project proposal, to reduce the levels of competition and risks involved in making a full application.

We will have two competitions for major awards of over £5 million: in 2020–21 and 2022–23. More details on this will be available during 2019.

## **Outcomes**

We will continue our outcomes-based approach with an emphasis on capturing the difference our investment makes for heritage and people. We will give more support to help applicants carry out high-quality evaluations and show the impact they have. As well as introducing one new outcome (wellbeing, see page 41), we have simplified the outcomes framework while still recognising the full impact that heritage projects deliver and the benefits they bring.

Our outcomes are now:

- Heritage will be in better condition.
- Heritage will be identified and better explained.
- People will have developed skills.
- People will have learnt about heritage, leading to change in ideas and actions.
- People will have greater wellbeing.
- A wider range of people will be involved in heritage.
- The funded organisation will be more resilient.
- The local area will be a better place to live, work or visit.
- The local economy will be boosted.



We want to make heritage more inclusive and enable everyone to enjoy it. So all projects must achieve the outcome "A wider range of people will be involved in heritage".

Our expectations will be proportionate, with larger projects needing to demonstrate real ambition in engaging new people with their heritage. Applicants will not need to achieve all of these outcomes. They may achieve

one exceptionally well, or several, depending on the size, scale and aims of the project. We expect that projects receiving larger amounts of funding will make a greater contribution to achieving outcomes, and therefore supporting our progress against our objectives for our funding overall (see page 49).

**Top**  
**The Daniel Adamson**  
**Marine Heritage project**  
 The Daniel Adamson  
 Preservation Trust

# Working strategically and championing innovation

We will continue to identify opportunities for strategic collaborations that will develop the impact and influence of heritage in society. We'll also champion innovative approaches to support the capacity and resilience of the sector as a whole.

## Heritage campaigns

Alongside National Lottery Grants for Heritage, we will run heritage campaigns to:

- fulfil identified strategic needs or funding gaps
- create opportunities for advocacy and strategic leadership
- stimulate innovation
- bring in new sources of expertise, audiences and resources for heritage through partnerships.

**“We are committed to driving innovation, testing and learning from new approaches”**

Each campaign will have a clear geographical reach (UK-wide, national or local) and will be time-limited. Alongside our funding, campaigns will also offer opportunities to share new knowledge and learning to benefit the heritage sector.

In the early years of the Strategic Funding Framework we expect to run the following UK-wide heritage campaigns:

- Capacity building and organisational resilience, responding to continued strategic needs and priorities expressed in our strategic consultation (2019–21, see page 38).
- Digital capabilities, responding to our Tailored Review and the UK Government's Culture is Digital project (2019–21, see page 40).
- Wellbeing, to encourage collaboration between heritage and health/wellbeing organisations, and to support high-quality projects (2020–21, see page 41).
- Dynamic Collections (2020–21, see page 45).
- Place (2021–22, see page 43).

Other UK-wide, country and local campaigns will be announced periodically.

## Innovation and partnerships

We are committed to driving innovation, testing and learning from new approaches, working with partners to share resources and add value to these initiatives. One way we will support this is by releasing Open Data about our grant funding from April 2019, and updating this on an annual basis.

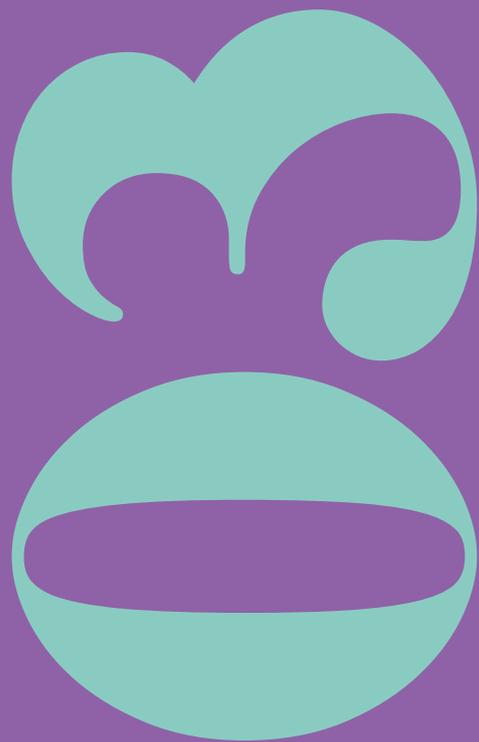
We will seize opportunities for new strategic interventions as they arise. Our work with partners on the future of the UK's public parks is one example of our approach to this. With Nesta and the National Lottery Community Fund we are delivering the Rethinking Parks initiative to support innovation in the management of public parks and urban green spaces.

We are developing this further through a new UK-wide initiative in 2019, Future Parks Accelerator, in partnership with the National Trust. This will enable local authorities and communities in up to eight places to develop long-term transformational solutions for the funding and management of their whole urban green space estate, protecting and enhancing the vital benefits to communities. The Accelerator will aim to catalyse and share innovation as well as develop new funding streams such as social investment and community enterprise. We will share all learning to help others and continue to act as a champion for the value of urban green spaces.

**Bottom**  
**Representing Birmingham**  
Birmingham Museums Trust



# Inspiring and leading





**Battle of Bannockburn  
Visitor Centre**  
National Trust for Scotland  
and Historic Scotland

# Capacity building and resilience

Stakeholders ranked supporting the capacity and resilience of the heritage sector as a whole as the most important priority for us beyond grant-making.

Since 2012 we have offered a range of funding designed to strengthen the resilience of organisations in the heritage sector through:

- building fundraising capacity
- strengthening governance, and business and enterprise skills
- enabling organisations to diversify their income.

## “Many organisations in heritage still need help to adapt and change”

Our research shows the effectiveness of capacity-building interventions so far, but the operating environment remains challenging and many organisations in heritage still need help to adapt and change.

For every £1 invested in the Catalyst Umbrella capacity-building programme, beneficiaries raised an additional £3.82 for their organisations through fundraising: over £9 million in total.

Under National Lottery Grants for Heritage £3,000–£10,000 and £10,000–£250,000, we will continue to offer heritage organisations support to build their capacity and resilience.

This ranges from small-scale funding to test new ideas or develop new fundraising approaches, to larger projects focusing on achieving strategic organisational change.

In 2019 we are launching a two-year heritage campaign focusing on capacity building across the heritage sector. Working with partners and building on learning from previous funding programmes, we will advocate for best practice, share knowledge, encourage networking and collaboration, and pilot new ideas. We will commission business support programmes to increase resilience and skills in fundraising, business and financial planning, governance, commercial enterprise and engaging with social investment. We will support the sector's capacity to engage internationally (see page 41) and support increased digital capabilities (see page 40). And we will explore new ways to offer matched funding incentives, building on our crowdfunding pilot developed with Nesta and Arts Council England, using our investment to encourage private giving.

### Loans and social investment

There is a growing appetite to make use of loans and other social investments in the heritage sector, in order to diversify income, strengthen business models and reduce reliance on grants. In our strategic consultation, 21% of respondents said they already use non-grant finance and a further 17% were interested in exploring it.



We see a range of opportunities to make National Lottery investment go further by recycling a proportion of it, and strengthen the capacity of organisations to engage with alternative types of finance.

We will develop a number of repayable finance interventions during the Strategic Funding Framework, piloting some approaches in the early stages. This will include offering a proportion of our funding as repayable grants, loans or other types of social investment. We will work with partners where our investment can attract additional funding for heritage from others, for example in an impact fund model. We'll also continue to provide help and support in investment readiness to enable more organisations to gain the financial and other skills needed to use repayable finance.

### Heritage Impact Fund

Launching in 2019, the Architectural Heritage Fund's Heritage Impact Fund includes our first significant commitment to provide working capital and capital investment loans to organisations with a social or community purpose operating within historic buildings. With a £2.25 million National Lottery investment, and a further £250,000 for capacity building through mentoring from 'business angels', the £7 million fund includes other contributions from Rathbone Greenbank Investment, Historic England, Historic Environment Scotland, and the Architectural Heritage Fund itself. The Heritage Impact Fund will provide loans of between £30,000 and £500,000 at competitive interest rates, filling a market gap for this type of lending.



## Digital

We will be supporting organisations to embed digital thinking in every project to ensure that they can take full advantage of new technology to conserve heritage and to make it more inclusive.

**“We will be supporting organisations to embed digital thinking in every project”**

This will include providing new tools such as the Digital Maturity Code and Index, being developed in partnership with Arts Council England, for use by heritage organisations across the UK. We will also run a UK-wide digital capacity-building campaign, which will offer grants totalling £1 million in 2019–20 and 2020–21 as part of our commitment to the Culture Is Digital project, developed by the Department for Digital, Culture, Media and Sport.

# International



Engaging internationally opens up opportunities for heritage organisations to exchange knowledge with other countries, promote themselves in new areas, work with new partners and drive inbound tourism. International work is already integral to the work of many large organisations, particularly major museums which have an explicitly international role. However, for much of the heritage sector it is the lack of capacity and funding which is holding them back.

We want to see the UK's heritage grow and learn by taking up opportunities to engage internationally. While we will continue to fund only UK-based projects, we will promote opportunities to build the capacity of organisations to make international connections and to benefit from doing so. We will cover appropriate costs such as travel, insurance, heritage activities and learning provided that the international activity has a clear rationale and offers benefits to heritage, people and communities in the UK and value for money.

## Wellbeing

Our new outcome is "People will have greater wellbeing". We want to encourage exciting new approaches and partnerships between organisations working in heritage and those with broader health and wellbeing aims, helping individuals to be more active and feel more satisfied with life.

conditions or disabilities are most likely to experience poor mental health and wellbeing. Our new focus on wellbeing should have a positive impact for more of these people.

Some cultural and natural heritage organisations are developing a track record for undertaking activity to deliver wellbeing impacts, with research demonstrating some established ways of measuring these. Our new good-practice guidance will point projects to these resources.

However, our consultation revealed a lack of confidence that heritage bodies were equipped to deliver wellbeing effectively. We will therefore focus one of our first UK-wide heritage campaigns on wellbeing. Alongside this funding from 2020–21, we will deliver a programme of thought leadership, sharing practice and collaboration to build heritage organisations' capacity and confidence.

**“We want to encourage exciting new approaches and partnerships between organisations working in heritage and those with broader health and wellbeing aims”**

There is growing evidence that those with the lowest relative wellbeing benefit most from high-quality interventions. These interventions will also support our inclusion priorities, in particular for young people and people on low incomes. Young people not in education, employment or training, and people with long-term health

**Left**  
**Improving Futures:  
Volunteering for  
Wellbeing**  
Imperial War Museum  
North and Manchester  
Museum



# Enterprise

**Top**  
**The former Harland and Wolff Headquarters building and drawing offices, Belfast**  
Titanic Foundation Ltd

**Right**  
**Great Place Scheme: Making Waves Together – Reimagining the Seaside Towns of Lowestoft and Great Yarmouth**  
Great Yarmouth Borough Council

Building on our recent track record through the Heritage Enterprise programme, we will continue to support projects that secure new uses for under-used, derelict or at-risk historic buildings. We'll also welcome commercial elements to these new uses where they support the viability of the scheme as a whole. In future, these types of project may be led by for-profit organisations in collaboration with not-for-profit organisations. Projects will need to deliver positive social and community outcomes and demonstrate that the public benefit will substantially outweigh any private gain.

# Housing

We are committed to addressing the long-term economic regeneration of local areas. Stakeholders support the inclusion of small-scale community-led housing schemes and social housing within mixed-use schemes, and while we have always been able to fund these, we will welcome these projects more explicitly in future.

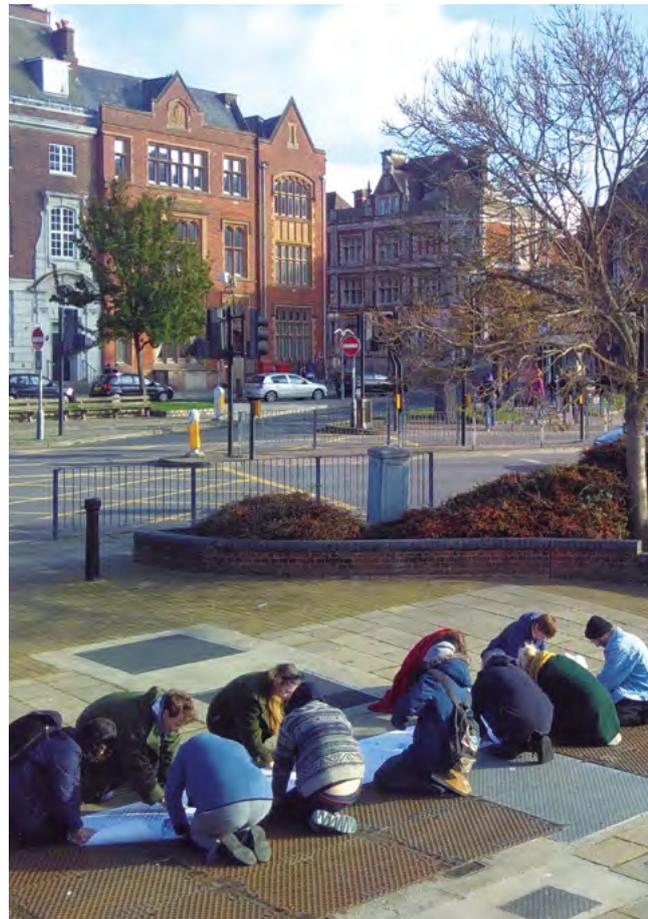
**“We are committed to addressing the long-term economic regeneration of local areas”**

We are keen to work strategically with partners, including the private sector, to demonstrate how the redevelopment and re-use of disused and derelict buildings could play a role in addressing areas of housing need, particularly where this also improves the condition of historic sites and buildings at risk.

## Place

Heritage is recognised as contributing to local identity and pride, as well as economic and social regeneration. Many projects we support already make a significant contribution to their local area. This could be through new enterprises, increased tourism and new training opportunities contributing to sustainable economic growth and jobs, as well as through improving residents' quality of life and opening up local heritage to everyone. Projects are building a wide range of sustainable local partnerships, for example when working at landscape scale or in a city.

Our investment in 34 Great Place Schemes across the UK is showing



how heritage can become more central to wider local agendas such as health and education, in both rural and urban settings. This is the concept of 'networked heritage' in action (see Heritage, Identity and Place at [www.thersa.org](http://www.thersa.org)).

We have commissioned research into the distinctive contribution heritage can make, and are exploring opportunities for strategic place-based investment with other funders, social investors and the private sector, as the focus of a future heritage campaign. We will welcome projects that take a place-based approach through National Lottery Grants for Heritage.

# Environment

In future, all projects we support will be able to demonstrate that they are good for the environment. This further develops our commitment to support environmental sustainability and to encourage organisations to adopt environmentally responsible measures which may also contribute to their resilience.

**“We will encourage organisations to adopt environmentally responsible measures which may also contribute to their resilience”**



We'll also offer practical guidance on how to do this, including through a new collaboration with Fit for the Future. This is an environmental sustainability network that supports people to make good decisions about integrating environmental measures into their projects.

We will take a proportionate and pragmatic approach. For example, projects receiving small grants of under £10,000 should think about simple steps, such as making a commitment to minimising waste and using recycled or biodegradable materials. Large capital projects will be expected to take a much more focused approach and to consider sustainability holistically across a much broader range of issues.

**Left**  
**Back from the Brink:**  
**saving England's most**  
**threatened species**  
Natural England

# Museums and collecting

We will build on our previous investment in strategic collecting to support museums, archives and libraries across the UK through a heritage campaign focused on dynamic collecting. This will include development of curatorial skills, sharing expertise, storage solutions, developing and rationalising collections, and utilising collections to benefit people and communities.

Dynamic collections management is also one of the priorities identified for museums in England in the Mendoza Review. We are working closely with Arts Council England to deliver the Review's recommendations. We will use both organisations' expert knowledge of English museums to inform grant decisions, and will work together through a series of formal partnerships and collaborations where our interests as National Lottery distributors coincide.

**“Our consultation with National Lottery players revealed a strong appetite and enthusiasm for public involvement in our work”**

## Public involvement

Our consultation with National Lottery players revealed a strong appetite and enthusiasm for public involvement in our work and the projects that we support – as audiences, participants, volunteers, supporters and decision-makers. There was a clear message about involving the communities and local people who would benefit in deciding what is funded, as well as support for involving people with a wide range of backgrounds and experiences.

We already undertake open recruitment for decision-makers on our country and English regional committees.

We also ask organisations we fund to demonstrate how they have involved their local community and other partners in developing their plans. Recently, we involved young people in making grant decisions for our youth programme, Kick the Dust, and they have since actively championed heritage as young ambassadors.

We will explore and trial other options for involving the public in our work over the next five years, balancing the resources required to do this with the benefits to projects, the National Lottery Heritage Fund and National Lottery players.

# Resourcing

# 04



## Income and budgets

We receive 20% of the National Lottery's 'good causes' income and set our budgets for investment annually depending on its performance. We will review our plans regularly and may need to make changes during the life of the Strategic Funding Framework in response to external developments, including fluctuations in our income.

As a guide, and based on current income forecasts, we plan to award around £1.2 billion in total during the five-year life of the Strategic Funding Framework.

# Our investment portfolio

Our investment portfolio will comprise:

- National Lottery Grants for Heritage £3,000–£5 million – project grants responsive to applications for all types of heritage.
- Heritage campaigns focused on cross-cutting themes or areas of heritage which will draw together opportunities for research, advocacy and partnership working as well as grant funding for specific activities (e.g. capacity building in 2019–2021). These may operate UK-wide, or on a country, area or local basis.
- Joint funds to deliver strategic initiatives in partnership, such as Rethinking Parks.
- Social investments such as impact funds and loans.
- Two rounds of major grants of over £5 million in 2020–21 and 2022–23.

The key features of our processes for application, decision-making and monitoring for National Lottery Grants for Heritage £3,000–£5 million are available on our website. We will announce the details of other strategic interventions periodically, including timetables for applications and decisions, usually in our annual business plan.

# Our approach to allocation and delegation

We will continue our current practice of per capita allocation of budgets for all funding not reserved for strategic interventions or UK-wide competition. We will also retain a 'country reserve' for Scotland, Wales and Northern Ireland for high-priority cases that cannot be accommodated in the delegated budgets.

Decisions on around 80% of all of our funding will be made by local decision-makers – committees and senior staff in Scotland, Northern Ireland, Wales and the three areas of England. This will include decisions on project grants between £3,000 and £5 million through National Lottery Grants for Heritage, and on any country or local heritage campaigns, joint funds or social investments that are being funded through delegated budgets.

In the case of England any national intervention will be top-sliced from the English area budgets, or through agreement between the English areas themselves.

Our UK-wide Board will retain oversight and decision-making for all UK heritage campaigns, joint funds, impact funds and major awards over £5 million.

## The per capita allocation of budgets is:

Northern Ireland	2.9%
Wales	4.8%
Scotland	8.4%
England – North	23.7%
England – Midlands and East	25.3%
England – London and South	35%

# A positive and lasting change



## Strategic objectives and key performance indicators

We have six strategic objectives for our investment during the life of the Strategic Funding Framework and have identified some clear key performance indicators (KPIs) that will be simple to track.

We will demonstrate our impact through monitoring the change between the KPI baseline levels (where relevant) set in 2018–19 at the start of the funding framework, to what they are during and after the end of the funding framework in 2024–25. We will need to track the economy-related KPI for a greater time period, as economic impacts will take longer to realise and evidence.

### **We will continue to bring heritage into better condition**

This conveys the importance we place on the condition of heritage. For example, we will measure the extent to which heritage is no longer at risk as a result of our investment by tracking grant data.

### **We will inspire people to value heritage more**

Heritage must remain at the core of every project we fund. Our research shows that a broad range of heritage is important to National Lottery players. We will track the public perception of the value of heritage.

# Outcomes and strategic objectives

The projects we support will achieve one or more of the outcomes set out below. When aggregated across our funding they will in turn deliver the objectives we have set for our funding as a whole.

## We will ensure that heritage is inclusive

We will do this by measuring and reporting on the demographics of the people engaged through all our work (as visitors, participants, staff, volunteers, trainees and those leading and governing projects), and by tracking the geographic spread of our grant funding across the UK.

## We will support the organisations we fund to be more robust, enterprising and forward looking

We will evaluate a sample of organisations before and after our funding to assess whether they have become more resilient.

## We will demonstrate how heritage helps people and places to thrive

National Lottery players want to see us fund projects that produce a strong social benefit in local areas. We will measure the added value of our intervention in 13 priority areas (see page 29) compared to other areas using a range of established indicators.

## We will grow the contribution that heritage makes to the UK economy

Heritage creates economic benefit. We will measure how much benefit is created in terms of jobs, Gross Value Added and tourism, and what proportion of that can be attributed to our investment.

Outcome	Strategic objective
Heritage will be in better condition	We will continue to bring heritage into better condition
Heritage will be identified and better explained	We will inspire people to value heritage more
A wider range of people will be involved in heritage	We will ensure that heritage is inclusive
The funded organisation will be more resilient	We will support the organisations we fund to be more robust, enterprising and forward looking
People will have developed skills People will have learnt about heritage, leading to change in ideas and actions People will have greater wellbeing The local area will be a better place to live, work or visit	We will demonstrate how heritage helps people and places to thrive
The local economy will be boosted	We will grow the contribution that heritage makes to the UK economy

# Appendix 1: Developing our strategy

## **Strategic research and evidence review**

Our plans for 2019–2024 are grounded in a wide range of strategic research, data analysis and evaluations of the impact of past funding. Full reports are available at [www.heritagefund.org.uk](http://www.heritagefund.org.uk).

## **What you told us**

During 2017–18 we consulted widely with National Lottery players, customers and stakeholders on the opportunities and challenges facing the UK's heritage over the next five years and what our priorities should be for National Lottery investment. We also surveyed over 10,000 people UK-wide on their views about heritage. Overall, over 13,000 people and organisations have helped us shape our plans.

## **National Lottery players' priorities for spending on the heritage good cause**

Our researchers held workshops with over 200 National Lottery players across the UK to discuss heritage and share views on funding for heritage and the National Lottery Heritage Fund (previously Heritage Lottery Fund). What they talked about can be grouped into five broad themes:

- Breadth of funding: National Lottery players were pleasantly surprised by the variety of funding, and liked the fact that both smaller and larger projects can access funding. They were keen for this diversity to continue.
- Heritage alleviating social issues: the impact heritage can have on social, cultural and economic issues, contributing to wellbeing and the local economy, is a priority for National Lottery players.

- Being proactive: participants felt that it was important for us to be active in communities by finding out what local people want for their heritage and supporting people who want to do heritage projects.
- Involving the public in decision-making: participants felt that decisions about community funding should include the views of people from that community.
- Raising awareness: National Lottery players thought it was important that people understand what the National Lottery Heritage Fund does, what is being achieved with Lottery funding and what we are supporting in their local area. By raising awareness of our work, people can volunteer, visit and feel proud of what their National Lottery ticket purchase is doing.

## **Public perceptions of heritage**

A survey of over 10,000 people in the UK investigated the public's views on heritage and how it is valued; whether the views expressed in the National Lottery player research were also true of the general population; and what people thought about our proposed strategic objectives. In general, the findings from the National Lottery player research were validated and a large majority of people agreed with all six of our strategic objectives.

## **Consultation on our Strategic Funding Framework proposals**

People from over 1,500 organisations responded to our strategic consultation, conducted online and at a UK-wide series of events. There was widespread support from stakeholders for our plans for 2019–2024, and we have made adjustments and improvements to some in the light of views expressed.

# Appendix 2: Our policy and operating context

## Tailored Review of Heritage Lottery Fund

In developing our approach we have been supported by the Government's 2017 Tailored Review of the Heritage Lottery Fund. The Review found that we are an effective and efficient organisation and its recommendations have encouraged our ambitions in this Strategic Funding Framework to:

- take a stronger leadership position, setting clearer strategic priorities for heritage across the four countries of the UK within a UK-wide framework
- test alternatives to pure grants, such as social investment and other types of repayable finance to increase the sustainability of the sector
- support the sector in working internationally
- support increased use of digital and enhanced digital capabilities
- support the development of the National Lottery brand.

## Policy Directions

During 2018 the UK Government consulted on new Policy Directions for our work UK-wide and, for the first time, in England. These were published in November 2018.

The Scottish and Welsh Governments also issued us with new Policy Directions in early 2019.

## Heritage sector agencies across the UK

We work with a wide range of partners, including governments, non-governmental organisations (NGOs), national and regional cultural agencies and umbrella bodies such as the Heritage Alliance. The following organisations are the statutory bodies for our work across the UK. There are no statutory agencies responsible for Parks, some aspects of Industrial, Maritime and Transport Heritage, and Intangible Heritage.

## Built environment and Industrial, Maritime and Transport Heritage

Historic England  
Historic Environment Scotland  
Historic Environment Division,  
Department for Communities  
Northern Ireland  
Cadw  
National Historic Ships UK

## Museums, libraries and archives

Arts Council England  
Museums Galleries Scotland  
Northern Ireland Museums Council  
Museums, Archives and Libraries  
Division, Welsh Government  
The National Archives  
National Records of Scotland  
PRONI (Public Record Office of  
Northern Ireland)  
British Film Institute

## Landscapes and nature

Scottish Natural Heritage  
Scottish Environment Protection  
Agency  
Natural England  
The Environment Agency  
Natural Resources Wales  
Northern Ireland Environment Agency

For contact details please see our website  
[www.heritagefund.org.uk](http://www.heritagefund.org.uk)

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