

## NHLF FULL APPLICATIONDevelopment Phase

### Guidelines

Source	<a href="https://www.heritagefund.org.uk/funding/national-lottery-heritage-grants-250k-10m/application-questions">https://www.heritagefund.org.uk/funding/national-lottery-heritage-grants-250k-10m/application-questions</a>
Submission date for application	If EOI is successful, the applying organisation has 12 months to submit a full application
Timeline for Development phase	The project team has up to 2 years to complete the development phase
RIBA Stage	For projects involving capital works, NHLF will look at plans when they are in line with RIBA work stage 2

### Application - supporting documents

Documents classified as mandatory	
Documents not mandatory for local authorities	

Documents		Description	Notes
Filled out questionnaire			Covered in-house by LCM
Timetable for the development phase		A detailed timetable outlining the development phase of the project	Covered in-house by LCM
Risks for the development phase		A risk register documenting potential risks to the development phase and how they will be managed	
Timetable for delivery phase		A summary timetable for the project's delivery phase	
Risks for the delivery phase		A risk register detailing risks related to the delivery phase and how they will be managed	
Main risks document for after the project is completed		A document outlining key risks after project completion and how they will be managed	
Accounts		The most recent audited or accountant-verified accounts for the past three years, along with management accounts for the same period. Public organizations (e.g., local authorities or universities) are exempt	n/a
Detailed cost breakdown		A spreadsheet listing all project costs as outlined in the application, with expenditure and income referenced according to budget headings. Each item must be detailed.	Consultant fee ( <i>see the list of cost items to be included, in the section below</i> ) Quantitative Surveyor fee
Partnership agreements		A signed agreement defining the roles and responsibilities of all partners involved in delivering the project. It should be tailored to the project's needs, and independent advice may be required. Partners are not subcontractors	Covered in-house by LCM
Job descriptions		A description for each new position created for the project, specifying salary and working hours.	Covered in-house by LCM
Briefs for commissioned work		A document outlining the scope, timeline, and cost of commissioned work. Competitive tenders or quotes are required for fees exceeding £10,000, with proof of the tendering process required for amounts over £50,000	Covered in-house by LCM - write and coordinate all consultants briefs
Images		Up to six images illustrating the project, such as a map indicating locations involved in the project.	Consultant fee, to develop supporting renders for the City Museum scheme Architectural fee, to develop the scheme further to RIBA WS1 (recommended)
Evidence of support		Up to six pieces of evidence of support from other organisations or individuals who are committed to helping deliver the project or are key to the project's success	Covered in-house by LCM
Calculations of full cost recovery included in your development phase costs		If full cost recovery is included in the budget, a document must be provided to show the calculation method, ensuring proportionality to project resources. NHLF can cover a portion of an existing staff member's cost unless they are dedicated to a newly created role. Public sector organizations cannot claim full cost recovery.	n/a
Business plan		The organization's current business plan, which focuses on overall operations rather than specific projects. If unavailable, LCM should submit the primary document used for heritage management. Organizations managing multiple sites (e.g., Local Authorities) should submit the most relevant documents.	Consultant fee, to review draft prepared in-house by LCM
Condition survey		If the project involves heritage conservation, a survey or report must outline the current condition, required works, and priority levels. Alternative surveys, such as those assessing building performance or energy efficiency, may also be applicable.	Covered in-house by LCM Conservation Management Plan (recommended)
Ownership documents		Copies of ownership records (e.g., Land Registry documents, lease agreements, or heads of terms) must be provided for capital works or purchases of land, buildings, or collections.	Covered in-house by LCM
Heritage Enterprise supporting documents		If submitting a Heritage Enterprise application, LCM must provide: - A viability appraisal demonstrating conservation deficit - A design specification for capital works in the development phase - Two to three relevant documents outlining the area's vision and strategy (e.g., local development framework, regeneration strategy, tourism strategy).	n/a
Declaration		A section where LCM can opt into research participation and confirm agreement with the declaration by ticking the appropriate checkboxes.	Covered in-house by LCM
			Fee for public consultation
Concept interpretation			Fee for design concepts
			15% Contingency, to lead / coordinate consultant, QS, architecture, CMP
			<b>TOTAL</b>

**Detailed cost breakdown:**

Cost	Description
Capacity building activity	Activities needed to enhance the organization's capacity to deliver the project. This may include reviewing human resources or finances, bringing in additional expertise, or making governance changes.
Opening-up works/surveys	Initial surveys or reports required for a site, building, landscape, or resource.
Professional fees	Costs for services needed during the project, such as building surveyors, landscape architects, or conservators. Fees should align with professional guidelines and be based on quotes from the relevant professionals or professional bodies.
Recruitment	Costs related to advertising roles and covering travel expenses for interviews. The organization is expected to adhere to good human resource practices and all applicable laws.
Full cost recovery	A cost type covering indirect expenses essential for the organization's operation but not directly linked to the project. NHLF can fund a proportion of these overhead costs for voluntary sector organizations. Eligible voluntary sector organizations are independent of the government and typically have a Board of Trustees, receive funding through grants and donations, and rely on volunteers.
Other costs (development phase)	Development phase costs that do not fall under any other category. These may include scoping or planning work related to investment principles. If the project is in Wales, translation costs into Welsh must be accounted for. Reasonable adjustments can also be included here.
Volunteer time	Time contributed by volunteers to support project delivery, such as administrative tasks, site clearance, or event stewarding. The cost of volunteer time is valued at £20 per hour and must be included in both the cost and income sections of the application. Participants in activities (e.g., workshop attendees) should not be included under this category.
Non-cash contributions	Items or services provided at no cost, such as room hire or equipment, that are essential for project delivery. These must be direct project costs that could have otherwise been part of the budget. Non-cash contributions should be reflected in both the cost and income sections of the application.
New staff	Costs for project staff, including applicable on-costs. This includes new fixed-term contracts, secondments, apprenticeships, and freelance staff but excludes trainees. In certain cases, maternity leave and redundancy payments may be included. The organization must adhere to legal employment practices, including paying at least the National Living Wage.
Contingency	A mandatory cost category covering unforeseen project expenses. The contingency amount should correspond to identified risks and the project's scale. These costs must be listed separately and not within other budget headings.

Income
local authority
other public sector
central government
private donation – individual
private donation –
private donations – corporate
commercial/business
own reserves
other fundraising
loan/finance
non-cash contributions
volunteer time