



# Heritage Development Trusts Guide for Applicants

# About the Heritage Development Trusts capacity building programme

The Heritage Development Trusts capacity building programme is a strategic partnership between the Architectural Heritage Fund (AHF) and the National Lottery Heritage Fund, providing resources to charities and social enterprises to make a positive and lasting impact on heritage in their areas. Organisations selected as Heritage Development Trusts will be supported to become active delivery partners in place-based built heritage regeneration initiatives. It supports the objectives of the Architectural Heritage Fund's [2023-28 strategy](#) and the National Lottery Heritage Fund's places strategy [Thriving Places](#).

This programme will provide funding and capacity building support to between 10 and 13 Heritage Development Trusts operating in locations of need and potential across the UK, who will join the existing group of 7 Heritage Development Trusts in England supported as part of a pilot initiative between 2020-23.

## What are Heritage Development Trusts?

The Heritage Development Trust model, developed by the Architectural Heritage Fund, is not a prescribed legal structure – organisations can be social enterprises or charities of different forms. What Heritage Development Trusts share is a unifying commitment to the reimagining, repair, and reuse of historic buildings of value to their community. They are:

- **Multi-building developers:** acquiring and managing a portfolio of heritage assets, to create an economically sustainable model through their revenue-raising potential;
- **Community-based partnerships:** arising from the needs of their community, and working in close partnership with local people, local government and local business; and
- **Entrepreneurial & Not for Profit:** reinvesting their surpluses in development, and creating additional economic, social, environmental and cultural value for their communities.

## Who will be eligible to apply?

Charities or social enterprises with the potential to deliver place-based heritage-led regeneration in the communities where they operate. In exceptional circumstances, if there is currently no eligible organisation in existence in a specific place, but a clear need and desire to create a Heritage Development Trust, then we will accept applications from other agencies, such as local authorities, wishing to establish a new Trust, provided sufficient independence can be demonstrated. We can also accept applications from two or more organisations working in partnership.

Applicant organisations should have in place plans to take on a portfolio of projects to deliver heritage-led regeneration. The need for the grant must be justified and accompanied by an outline financial proposal, which sets out how the funding will be spent and how you propose to develop new income streams over the next five years. Evidence of local authority support, project partners and community consultation and buy-in should also be provided.

There is only one round of applications for this funding. The deadline for applications is **9am on 15<sup>th</sup> September 2023**. Applicants will be informed of the outcome of their applications in December 2023.

**As a condition of the funding, the successful applicants will be expected to share knowledge and lessons and to participate in wider learning opportunities for the heritage sector as a whole.**

## What are the criteria for support?

Applications will be assessed against the following five criteria:

**Criteria 1:** A charity or social enterprise with demonstrable plans and ambitions to scale up activity within its area of operation or region. Alternatively, a local authority or other agency with the intention of setting up a new independent Trust with credible plans for growth.

**Criteria 2:** A pipeline of potential projects to be acquired and developed as heritage assets, capable of generating revenue that will support the organisation's long-term sustainability.

**Criteria 3:** A supportive local authority that may be willing to contribute resources, such as funding, property, advice or people and evidence of the potential for partnerships with other public or private sector stakeholders, such as the Chamber of Commerce or Business Improvement District.

**Criteria 4:** Evidence of buy-in from the wider community and other third sector partners where relevant. We expect to see an inclusive and place-based approach to regeneration.

**Criteria 5:** Demonstrable track record of project delivery (or if no track record the individuals involved and their relevant experience), good governance, and robust decision-making processes.

*Extra weighting will be given to places identified as priority areas for support by the National Lottery Heritage Fund.*

## What support will be available?

The type of support will vary depending on the stage of development of each Trust and its individual needs but, in summary:

- Revenue funding of between £55,000 and £70,000 per year, for three years, from January 2024;
- Access to support from consultant Project Advisers specialising in areas such as governance, social impact measurement, community engagement, fundraising and social investment, business planning, environmental sustainability and green energy solutions;
- Eligible to apply for Project Viability Grants (up to £15,000 per project) and Project Development Grants (up to £75,000) to develop projects involving the rescue and reuse of historic buildings;
- Membership of a UK-wide peer-to-peer learning network of Heritage Development Trusts;
- Mentoring from another Heritage Development Trust.

## What will this funding help you achieve?

At the end of the funding period your organisation will ideally have completed at least one historic building regeneration project and have a clear action plan for acquiring more heritage assets to add to its portfolio. It will have diversified and grown its income streams, developed partnerships with a range of local stakeholders and will be in a position to play a key role in delivering heritage regeneration over the long-term in its locality.

We expect to work closely with you to undertake a thorough evaluation of the success of the project and will discuss how to achieve this with all successful applicants at the start of Year 1. Your organisation's performance in delivering its proposals will be monitored throughout the programme and be subject to a final evaluation.