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HOW TO?

Finance a
Heritage Project



Supported by the National Lottery Heritage Fund, Hands-On Heritage NI is a project that combines traditional heritage engagement and outreach with the introduction of a range of new digital engagement technologies, better connecting people and communities with built heritage.



This is one of ten Heritage: How To? Guides, covering a broad spectrum of ideas in relation to Northern Ireland's historic environment.

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From the smallest community initiatives to the largest restorations, heritage projects can be challenging endeavours which require the pooling of many resources: skills; time; effort; materials. However, underpinning your heritage project will usually be the one resource which matters above all else: money.

Not all projects will require great expenditure. Indeed some projects may require no money at all and be based, for example, around online research. This being said, most projects, particularly physical repair and restoration programmes, will require a significant financial outlay, potentially ranging from hundreds to thousands to even millions of pounds for larger capital projects.

The vast majority of us do not have access to these significant financial sums. Your project will likely rely on an application for funding from government bodies, trusts, funds, or other charitable organisations. In times of greater economic hardship, financial support for heritage projects can be difficult to find. When it is found, and you or your group are eligible for it, various rules and stipulations often apply, and these can be challenging to navigate for those without experience.

This How To? Guide outlines the basics of financing your heritage project. This includes eligibility for funding, what you will need to do when you are applying for funding, how to manage your finances, and the key organisations to look to for financial assistance.

Throughout our Heritage: How To? Guides we refer to heritage assets as buildings and monuments.

Thank you to David Bunting @ImagesNI for providing a selection of images for this guide.



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1 | The importance of regular maintenance

If you are the owner of an historic building, or have recently come to possess or inherit one, it is of paramount importance that you institute a programme of regular repair and maintenance.

A costly, time-consuming restoration project can be totally mitigated with more frequent but much smaller financial outlays to address minor problems such as leaks, cracks, or vegetation growth. Left unchecked, these and other problems can lead to a building falling into a ruinous condition. The more perilous a structure's condition, the more work required to rescue it, the more money necessary, and the more difficult it will be to acquire these funds.

Furthermore, to strengthen your case for any potential external funding, it is essential that you can demonstrate that you have tried to maintain your building where possible. However, it is understood that in some cases historic materials come to the end of their lifespan and may need to be repaired or, as a last resort, replaced.

For more on the maintenance and rescue of built heritage, consult our **How To? Maintain Historic Buildings** and **How To? Rescue Heritage** Guides.



2 | Private funding

In Northern Ireland, funding assistance for private owners has been reduced considerably since 2015, meaning the funding pathways for private owners can be limited and often competitive.

Constituted groups such as building preservation or charitable trusts, community groups, or social enterprises have a broader spectrum of funding options available to them and can often obtain a ‘cocktail’ of funding from different bodies.

If you are a private owner, you might think of ways to monetise your heritage asset through a business or commercial venture, or by taking in a lodger or tenant for a period of time.

3 | Public funding

What to think about when seeking public funding

In most cases, however, private funding will not be sufficient for your project, and you will have to apply for public funding.

Before applying for funding, you may want to ask yourself, as private owner or a member of a building preservation or charitable trust:

- Have you made attempts yourself to safeguard and maintain the building?
- Was the building already in poor condition when you became the owner?
- Will your repair or restoration plans solely benefit the inhabitants of the property or contribute to the wider community?
- Have you carried out a condition assessment and an appropriate specification of what needs to be repaired or replaced?
- Can your repair works be phased at all to accommodate different rounds of funding?
- Do you need Listed Building Consent for the proposed works?
- Are you open to potential conditions of funding, for example: opening your property for public events?



You must demonstrate to funders that you have thought about why you are asking for funding and what need the provision of funding will address. Most funders will look for evidence that an owner has cared for their building within their own means, as far as possible, before requesting financial assistance. Owners may consider applying for a smaller amount of funding to address urgent issues which may, for example, get their building watertight, staving off any immediate decay of the historic fabric.

Remember to highlight the value of your historic asset. Whilst the building may be in private ownership, many buildings contribute both tangible and intangible benefits to place and community. Your ability to understand and articulate this will help you when completing a funding application.

For help with doing this, consult our **How To? Read Heritage** and **Record Heritage** Guides.

It is also worth considering how your heritage project will:

- Enhance and conserve the wider built environment
- Benefit tourism and the local community
- Support the craft skills and construction industries

4 | Before you apply

Before applying for funding, it is advisable to have a discussion with the funding body you intend to apply to in order to ensure you understand what they fund and what deliverables they may require from you. If part of an organisation, consult with your board or committee to establish a realistic work plan of what you would like to achieve. Funders want to know that you have the capacity and skills to deliver your proposal.

Funders may seek to clarify one or more of the following:

- Your group is properly constituted, e.g. is a registered charity
- You have skilled people on your team and have assigned key roles and responsibilities
- You have an interesting project/historic building which is valued by the community
- You have ownership of a building or, where not, a long term lease is agreed
- You can demonstrate evidence of need/future use
- You have consulted with a range of people including local communities, local authorities, and government bodies, where applicable
- You have researched examples of similar projects
- You have a good community-business plan, where applicable
- You have sought the appropriate planning consents for the project
- If relevant, you have identified any smaller scale works that could be carried out to prevent the building falling into disrepair whilst the project is planned

In addition to awarding grants and advising on financial matters, many funding bodies can provide guidance and assistance with other aspects of project planning, such as feasibility studies and condition assessments.



5 | Establishing a track record

You might not have carried out previous projects, but that shouldn't put you off applying for funding. Everyone has to begin somewhere, and starting off small will allow you to understand the capacity needed to deliver a larger project.

Tasking yourself or your group with smaller projects will also help you build up a track record and highlight your worth to funding organisations. Small revenue projects may enable you to generate funds to pay for a larger part of your project. For example, opening your building for tours could pay for project feasibility study or a condition report. In addition, meanwhile uses can raise the profile of the project and potentially also make some money. More importantly, they demonstrate how the building can be used, and are a means to monitor any new or ongoing issues.

It is good to get the local community involved at an early stage, which will raise awareness of your project and also demonstrate to funders that your project seeks to improve the lives not just of those who will directly make use of your asset, but the area as a whole.

A good example of this is the repair of Crossgar's water pump. In March 2021, the pump was struck by a car, causing it to snap off its base and lose its handle. The pump was at risk of being scrapped until it was rescued by local historical enthusiasts who set up a crowdfunding page to raise money for its repair. The local community raised nearly £3,000 pounds, and the pump was repaired and reinstated in early 2022.



6 | Managing finance

A well planned budget will enable you to identify how much funding your project will need, directing you towards the grants most appropriate for you or your organisation.

As your project progresses, you'll use your budget to track how your actual costs measure up against your estimated costs. If project requirements change, your budget may also change to reflect these.

Project budgets are also important because they:

- Are useful in the evaluation stage of your project, as they reflect your progress, successes, and failures by tracking expenditure against key milestones
- Can help to secure further funding by providing transparency into how resources are used
- Give insight into costs for potential future projects



It is important to work with what you have internally before considering outsourcing. The use of internal resources could save you and your project money. This could include the use of in-house staff, volunteers, networking connections, venues, guest speakers, and training opportunities. If outsourcing is necessary, it is important to find consultants who understand the ethos of your project, its limitations, and the requirements of your budget. Partnership projects with other organisations are a great way of extending your projects' resources by combining skills sets and financial resources to work together on a shared cause.

It is vital that your budget is well integrated with your project schedule. Detailed planning will make it easy for you to allocate the correct proportion of your budget to each task. With real-time information of the project's progress, you can gauge the performance of your time and money and take remedial measures in case of any difficulties.

For more on planning a heritage project, consult our **How To? Make Your Heritage Project Happen** Guide.

Contingency

Your budget and schedule will allow you to plan for how much a project will cost and how long it will take. However, sometimes things go wrong; projects go over budget, and deadlines are missed. Therefore, it is very important to build contingency into your project.

Project contingency may be thought of as the guarantee of additional resources allocated in a project to address possible uncertainties. This is then added to your original estimates to ensure you or your group are prepared for any unforeseen circumstances that could otherwise derail your efforts.

Budget contingency allows for any extra expenditure, increasing the likelihood that the project will be completed at or below the approved amount for funding.

Schedule contingency might take the form of additional time or a buffer in your project schedule. You might factor in an additional several days or even weeks to accommodate unforeseen delays.

There are several methods by which you can calculate project contingency; the internet is awash with business and marketing guides dedicated to doing just this. However, these are generally marketed towards for-profit businesses and based on cost/impact analyses. For heritage projects, where profit is unlikely to be a motive, it will be difficult to calculate contingency in this way. The easiest method is to build standard contingency levels – for example, 10% – into your budget or schedule.



7 | Key funders

Funding opportunities are constantly changing depending on the economic and political climate. Outlined below are many of the funding opportunities currently available as of 2023. These might not always be available; alternatively, there may come into existence grants or programmes that, as of yet, do not exist. It is very important to always be on the lookout for the latest funding opportunities.



Look out for funding updates on our Online Toolkit:
handsonheritage-ni.org.uk/toolkit/

It may also be possible to find grants using websites such as grantfinder.co.uk. While these are not always free to use, they can sometimes be accessed at no cost with the help of your local District Council.

National Lottery Heritage Fund (NLHF)

The NLHF is the most prolific funder of heritage projects across the United Kingdom. Since 1994, it has awarded over £8 billion to heritage projects nationwide, including £250 million in Northern Ireland. Funding from the NLHF covers a range of activities, including the purchase price of collection items or property, repair and conservation, new staff posts, and other costs to improve access to heritage.

Below are some of the funding programmes offered by the NLHF:

GRANT:	FOR:
National Lottery Grants for Heritage – £3,000 to £10,000	Projects lasting up to 1 year Not-for-profit organisations and private owners of heritage
National Lottery Grants for Heritage – £10,000 to £250,000	Projects lasting up to 5 years Not-for-profit organisations, private owners of heritage (grants up to £100,000), partnerships
National Lottery Grants for Heritage – £250,000 to £5million	Projects delivered over 5 years (with a development phase of up to 2 years) Not-for-profit organisations or partnerships led by not-for-profit organisations

Department for Communities: Historic Environment Division (HED)

The Department for Communities' Historic Environment Division is the government body responsible for recording, protecting, conserving, and promoting Northern Ireland's historic environment. It offers various grants for owners and groups to repair, research, and regenerate historic buildings, historic monuments, and the wider historic environment:

FUNDING:	FOR:
Historic Environment Fund HED's principal funding programme for the repair of heritage assets or the development of ideas to realise the wider value of our heritage. Subject to budget confirmation, it is normally launched in May each year.	Repair Stream Focused on essential repairs to roofs and windows, with priority given to thatched buildings, buildings on the HARNI Register, and buildings with owners on eligible benefits - £6,000 per roof (£12,000 for thatch) Scheduled Monument Regeneration Stream £2,000 to help historic monument owners carry out minor works Research and Revival Streams Up to £10,000 per award to support work to research or celebrate the historic environment
Village Catalyst grant scheme A partnership initiative between the Department for Communities (DfC), the Department for Agriculture, Environment and Rural Affairs (DAERA), the Architectural Heritage Fund (AHF), and the Northern Ireland Housing Executive (NIHE). Applications are invited from charities, social enterprises, and other not-for-profit groups in rural villages of less than 5,000 people who want to tackle rural poverty and social isolation in their area by developing a sustainable use for a disused historic building in their village.	Project Viability Grant To carry out viability work, with support offered up to £10,000 Project Development Grant To further develop your plans with support offered up to £20,000 Delivery Grant To deliver your project, with capital funding offered up to £200,000

Other funders:

FUNDING:	FOR:
Architectural Heritage Fund (AHF) AHF is a charity working to promote the conservation and sustainable re-use of historic buildings for the benefit of communities across the UK, particularly in economically disadvantaged areas	Heritage Impact Fund Loans from £25,000 to £500,000 for up to five years to support applicants across the UK who are seeking to acquire, reuse, or redevelop buildings which are of historic or architectural importance. The end use should be financially viable and should positively impact the communities in which the buildings are based
National Churches Trust A charity which promotes and supports church buildings of historic, architectural, and community value across the UK	Treasure Ireland Grants £500 to £10,000 for church maintenance or urgent repair work
Listed places of worship grant scheme Overseen by the Department for Culture, Media and Sport	These grants cover the VAT incurred in making repairs to listed buildings in use as places of worship
Community Ownership Fund Overseen by Department for Levelling Up, Housing and Communities	Through the Community Ownership Fund, voluntary and community organisations are eligible to bid for match funding to take ownership of assets, amenities, and facilities at risk of being lost that otherwise have value for the local people and place. Up to £250,000 is available per project

The following bodies have also supported heritage projects in the past:

- The Pilgrim Trust
- The Garfield Weston Foundation
- Tourism Northern Ireland
- The Executive Office of Northern Ireland
- Ulster Garden Villages

For more information on How To?
Finance a Heritage Project visit the
Hands-On Heritage website
www.handsonheritage-ni.org.uk
where you can access related
Heritage: How To? Guides.

Promotion – Protection – Conservation – **Regeneration**

Ulster Architectural Heritage (UAH) works to promote the historic built environment, its protection, conservation, and heritage-led regeneration, through advice and support, advocacy, publications, events, and project delivery. Since its formation in 1967, UAH has established itself as the lead independent voice for the historic built environment across the nine counties of Ulster, a fearless campaigner for historic buildings, a generous resource of information on local architecture, and a source of advice on conservation. UAH has had much success in influencing public opinion in favour of conservation of our historic built environment. UAH carries out reports, assessments, monitoring of the historic built environment, and makes representations relating to planning and policy. UAH educates, engages, and informs on built heritage through a wide range of events, publications, and projects.



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