

Thinking about...

Buying land and buildings

November 2009

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- downloading it from www.hlf.org.uk;
- emailing enquire@hlf.org.uk;
- phoning our helpline on **020 7591 6042**;
- contacting us by textphone on **020 7591 6255**; or
- using Text Direct **18001 020 7591 6042**.

If you require a copy of this guidance in an alternative format (large print, braille or audio version), or if your first language is not English, we can provide it in the appropriate format or language if you ask us. It is also available in Welsh.

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1 Introduction

The Heritage Lottery Fund (HLF) was set up in 1994 to distribute money raised by the National Lottery to heritage projects throughout the UK. In our first 12 years we awarded over £4 billion in grants to over 26,000 projects, from multi-million-pound investments in well-known sites and buildings to small grants making a big difference to community groups. We have a range of grant programmes for projects of different types and sizes – see the Appendix for more information.

This guidance is designed to help you think about an application to us for a project to do with buying land or buildings.

We can offer advice **before you apply**, but first please use our website www.hlf.org.uk to:

- read the guidance in the application materials for the grant programme you are interested in;
- decide broadly what you want to do and roughly how much money you are likely to ask us for;
- fill in a pre-application enquiry form online or in hard copy; and
- send it through our website or send it to your country or regional HLF team who will then contact you to offer advice on your project.

2 Our aims

HLF gives grants to support a wide range of projects involving the local, regional and national heritage of the United Kingdom.

We have three main aims which relate to learning, conservation and participation.

To receive a grant your project must:

- help people to learn about their own and other people's heritage.

Your project must also do either or both of the following:

- conserve the UK's diverse heritage for present and future generations to experience and enjoy;
- help more people, and a wider range of people, to take an active part in and make decisions about heritage.

3 What we fund

We fund projects which promote benefits for the public and which are not intended primarily for private gain. Applicants who are seeking a grant to purchase land and/or buildings should be not-for-profit.

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We can fund projects which involve the purchase of land and/or buildings which are important to our heritage, at or below market value. The principal reasons for purchase must involve the improvement of both public access and long-term management in line with our aims.

If you already manage the land and/or building that you want to buy in some way, you will need to show us what extra benefits buying the land and/or building will bring. You will need to show that all options for entering into an appropriate management agreement with the freehold owner have been explored before seeking a grant for purchase.

We can help you to make the purchase of land and/or buildings if:

- any risks to its preservation will be reduced by your purchase;
- the price accurately reflects the condition and value;
- the purchase will contribute to increasing access and understanding of the heritage;
- you have adequate plans for management and maintenance over a period of at least ten-years;
- you can demonstrate its significance to the heritage in a local, regional or national sense.

You should buy land and/or buildings with either the freehold or at least an 80-year lease. We do not accept leases with break clauses. We do not accept leases with forfeiture on insolvency clauses (these give the landlord the right to end the lease if the tenant becomes insolvent). You must be able to sell on, sublet and charge your lease but if we award you a grant, you must first have our permission to do any of these.

We will not support purchases which we think are above market value. If we award you a grant, we may require a charge on the land and/or building.

We can fund all associated purchase costs such as agent's fees, saleroom fees and taxes. Please ensure these are reflected in your cost table. You must also give careful consideration to the costs associated with meeting our aims in relation to learning and participation or conservation.

Each of our assessment programmes has its own criteria, but we will always take account of the value for money offered by your project, considering the overall project benefits (for heritage and for people) in relation to costs and the amount of grant you want from us.

For all projects involving a purchase, the terms of grant will last for 80 years (contract life) irrespective of the grant amount.

For **nature conservation projects** we will only help you to buy land and associated buildings and features in the following circumstances:

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- a) if you can provide evidence from the relevant agency that the land is:
- designated as being of local, national or international importance for its habitat value; or
 - a site which meets the conditions for being designated of national importance for nature conservation; or
 - around an existing nationally designated area, for land to be brought into positive and long-term management (this land area must be proportional to the size of the designated site and strategically located in order to give maximum biodiversity benefit).

And

- b) if the purchase will:
- conserve the heritage value; and
 - increase access and understanding; and
 - improve long-term management; and
 - contribute to meeting the UK Biodiversity Action Plan (UK BAP) or local BAP targets; and
 - expand the strategic significance of a heritage area.

For **landscape conservation projects** we will only help you to buy land and associated buildings and features in the following circumstances:

- a) if you can provide evidence from the relevant agency that the land:
- is designated as being of national or international importance for its historic design, scenic, landscape or archaeological value; or
 - meets the conditions for being designated of national or international importance; or
 - is adjoining an existing nationally designated area, for land to be brought into positive and long-term management for the benefit of the designated area, this land area must be proportional to the size of the designated site and strategically located in order to give maximum benefit.

And

- b) if the purchase will:
- conserve the heritage value; and
 - increase access and understanding; and
 - improve long-term management; and
 - expand the strategic significance of a heritage area.

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For **public park projects** we will only help you to buy land and associated buildings or items in the following circumstances:

- a) if you can provide evidence that the land, building or item:
- was originally part of a public park of local or national heritage importance; or
 - adjoins a public park of national heritage importance;

and

- b) if the purchase will:
- conserve the heritage value of the existing park; and
 - increase access and understanding; and
 - improve long-term management.

For **historic buildings or monuments projects**, we will only help you buy buildings, monuments and associated land if:

- a) you can provide evidence that the building or site:
- is of local heritage importance; or
 - is designated as being of national or international importance for its architectural or historic interest, its design, scenic, landscape or archaeological value (for example, a Grade II listed building in England); or
 - meets the conditions for being designated of national or international importance; or
 - is adjoining an existing nationally designated site or building. For land to be brought into positive and long-term management for the benefit of the designated site or building, this land area must be proportional to the size of the designated site and strategically located in order to give maximum benefit;

and

- b) if the purchase will:
- conserve the heritage value; and
 - increase access and understanding; and
 - improve long-term management; and
 - expand the strategic significance of a heritage site, monument or building.

We can also make grants to Building Preservation Trusts for revolving fund projects which involve purchasing a historic building and repairing it with the consequent aim of selling it on the open market. If the building is to be sold on,

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we will only contribute to the conservation deficit of the project. We recommend you discuss this kind of project with the Architectural Heritage Fund.

4 The information we need

You must provide all the relevant information and supporting documents we ask for in the application materials. This is the case even if you have a short amount of time in which to apply. If your timetable for acquisition is so short that you are unable to provide all the information, please contact us.

In addition, to help us make a decision, you must make sure that the following information is included in your application:

- clarification on whether you intend to purchase the freehold or leasehold and whether you intend to have a mortgage secured on the land or building;
- location plan to scale, clearly identifying the extent of the land or building to be purchased and any relevant access to the land and building;
- one independent valuation. This should include a detailed explanation of how the assessment of the market value was reached. We welcome valuations by the District Valuer. We may also arrange for our own valuation. We will normally be prepared to support a purchase at a figure up to 10% above the top of any range in an accepted valuation;
- evidence that the current owners are the owners (have legal title) and have the right to both sell the land and/or building and transfer the title to the new owner; and
- evidence of any legal covenants, or rights (such as fishing, shooting, mineral, drainage), or long or short term tenancies, or rights of way or access, or any other interests which are attached to the land or building.

5 Sources of advice and information

These organisations will help you find out more detailed information on areas such as ethics, conservation and other standards, acquisition and disposal. You should consult their advice on best practice:

Architectural Heritage Fund

www.ahfund.org.uk

Tel: 020 7925 0199

AHF promotes the conservation of historic buildings in the UK. It does this by providing advice, information and financial assistance in the form of grants and low-interest working capital loans for projects undertaken by building preservation trusts and other charities throughout the UK.

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Cadw (Welsh Historic Monument Executive)

www.cadw.wales.gov.uk

Tel: 029 2050 0200

Cadw is the historic environment agency within the Welsh Assembly Government with responsibility for protecting, conserving, and promoting an appreciation of the historic environment of Wales. The website includes details of technical and conservation publications, dealing with coastal heritage, historic landscapes, churches and chapels, historic farm buildings and landscapes of special interest.

Cyngor Cefn Gwlad Cymru (Countryside Council for Wales)

www.ccw.gov.uk

Tel: 0845 1306229

The Countryside Council for Wales is the Government's statutory adviser on sustaining natural beauty, wildlife and the opportunity for outdoor enjoyment in Wales and its inshore waters.

English Heritage

www.english-heritage.org.uk

Tel: 020 7973 3701

English Heritage is the government's statutory adviser on the historic environment in England. The conservation section of the website includes advice on conservation of buildings, on historic lime and building stone, online information resources. There is also a range of free publications on different aspects of managing the historic environment.

Northern Ireland Environment Agency (NIEA)

www.ni-environment.gov.uk

Tel: 0845 302 0008

NIEA takes the lead in advising on, and in implementing, the Government's environmental policy and strategy in Northern Ireland, including natural and built heritage. The website includes guidance on dealing with historic buildings and monuments, and natural heritage sites.

Historic Scotland

www.historic-scotland.gov.uk

Tel: 0131 668 8793

Historic Scotland safeguards the nation's built heritage and promotes its understanding and enjoyment on behalf of Scottish Ministers. The website includes guidance on listed buildings, ancient monuments, archaeology, carved stone and world heritage sites and a catalogue of over 140 technical publications on building conservation. Professional advice is available from the Historic

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Scotland Conservation Bureau on paintings, textiles, stone, stained glass and plaster work, as well as training courses. Tel: 0131 668 8668.

Joint Nature Conservation Committee

www.jncc.gov.uk

The JNCC is the UK Government's wildlife adviser, undertaking conservation work on behalf of the three country nature conservation agencies. The website includes guidance on habitats, species, protected sites and biodiversity.

Natural England

www.naturalengland.org.uk

Natural England works for people, places and nature to conserve and enhance biodiversity, landscapes and wildlife in rural, urban, coastal and marine areas. The website includes publications on conserving and managing habitats, geology, protected areas, wildlife species, coasts and seas.

Scottish Natural Heritage

www.snh.org.uk

Tel: 0131 447 4784

This is the agency responsible for caring for Scotland's natural heritage. The website includes useful guidance on all aspects of natural heritage, including site management.

Appendix

Our grant programmes

General programmes

Heritage Grants (above £50,000)

This is our main programme for grants over £50,000 for all kinds of heritage, and is open to all not-for-profit organisations. All applications go through two rounds (unless you are unsuccessful at the first round) and you can apply for development funding to help develop your project to the second round. Assessment takes three months at each round and the outcome of your application will then be decided at the next available decision meeting.

Your Heritage (£3000–£50,000)

This is our general small-grants programme for all types of heritage project. It is a flexible programme, open to all not-for-profit organisations, but is particularly designed for voluntary and community groups and first-time applicants, with a much simpler application process and a shorter assessment timetable (10 weeks).

Targeted programmes

Young Roots (£3000–£25,000)

Young Roots is a targeted programme for 13–25-year-olds who want to explore their heritage and develop skills. Young Roots projects stem directly from young people's interests and ideas, harnessing their creativity and energy, building their confidence and helping them work with others.

Parks for People (£250,000–£5 million)

Parks for People supports the regeneration of existing public parks, garden squares, walks and promenades across the UK.

Townscape Heritage Initiative (£500,000–£2 million)

Through our Townscape Heritage Initiative we make grants to help communities regenerate the historic parts of their towns and cities. The programme is designed for areas of particular social and economic need throughout the UK. Partnerships are funded to carry out repairs and other works to a number of historic properties within a defined area, some of which may be in private ownership, and improve the quality of life for all those who live, work or visit there.

Appendix

Landscape Partnerships (£250,000–£2 million)

Landscape Partnerships is our primary vehicle for promoting heritage conservation as an integral part of rural regeneration, delivered by partnerships representing a range of heritage and community interests to tackle the needs of landscape areas that may be in different ownerships. Each scheme is based round a portfolio of smaller projects, which together provide a varied package of benefits to an area, its communities and visitors.

Repair Grants for Places of Worship (£10,000 upwards)

Through this programme we help conserve and sustain heritage at risk through urgent repairs to places of worship. The UK-wide scheme is delivered through four programmes in England, Northern Ireland, Scotland and Wales. Repair Grants for Places of Worship in England and Scotland are awarded up to £250,000 and in Northern Ireland and Wales up to £100,000.

You can get more information by:

- downloading application materials from **www.hlf.org.uk**;
- emailing **enquire@hlf.org.uk**;
- phoning our helpline on **020 7591 6042**;
- contacting us by textphone on **020 7591 6255**; or
- using Text Direct **18001 020 7591 6042**.

Our offices

East of England

Terrington House
13–15 Hills Road
Cambridge CB2 1NL
Phone: 01223 224870
Fax: 01223 224871

East Midlands

Chiltern House
St Nicholas Court
25–27 Castle Gate
Nottingham NG1 7AR
Phone: 0115 934 9050
Fax: 0115 934 9051

London

7 Holbein Place
London SW1W 8NR
Phone: 020 7591 6000
Fax: 020 7591 6001

North East

St Nicholas Building
St Nicholas Street
Newcastle upon Tyne
NE1 1RF
Phone: 0191 255 7570
Fax: 0191 255 7571

North West

9th Floor
82 King Street
Manchester M2 2WQ
Phone: 0161 831 0850
Fax: 0161 831 0851

Northern Ireland

51–53 Adelaide Street
Belfast BT2 8FE
Phone: 028 9031 0120
Fax: 028 9031 0121

Scotland

28 Thistle Street
Edinburgh EH2 1EN
Phone: 0131 225 9450
Fax: 0131 225 9454

South East England

7 Holbein Place
London SW1W 8NR
Phone: 020 7591 6000
Fax: 020 7591 6001

South West

Trinity Court
Southernhay East
Exeter EX1 1PG
Phone: 01392 223950
Fax: 01392 223951

Wales

Hodge House
Guildhall Place
Cardiff CF10 1DY
Phone: 029 2034 3413
Fax: 029 2034 3427

West Midlands

Bank House
8 Cherry Street
Birmingham B2 5AL
Phone: 0121 616 6870
Fax: 0121 616 6871

Yorkshire and the Humber

4th floor
Carlton Tower
34 St Paul's Street
Leeds LS1 2QB
Phone: 0113 388 8030
Fax: 0113 388 8031

Head office

7 Holbein Place
London SW1W 8NR
Phone: 0207 591 6000
Fax: 0207 591 6001

Textphone:
020 7591 6255

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