

**POLICY NO: 7.6.9**

**HERITAGE ASSISTANCE FUND**

**INTRODUCTION**

The Heritage Assistance Fund provides financial assistance to persons who wish to undertake approved heritage conservation projects on places listed on the City's Municipal Heritage Inventory and/or the State Register of Heritage Places.

**OBJECTIVES**

- To promote best practice conservation planning and physical conservation works associated with places of cultural heritage value within the City;
- Encourage a partnership approach between owners of heritage listed places and the City;
- Provide financial assistance to owners in the conservation and restoration of places identified as having cultural heritage significance within the City; and
- Encourage owners to support the designation/retention of buildings recognised as having cultural heritage significance within the City.

**1. FUNDING CATEGORIES**

Funding is available through one of the two categories listed below:

**1.1 Documentation**

This category is best suited for those who wish to seek advice, plans and/or specifications that will assist in making decisions about a heritage listed place and to guide future development.

Examples of these include:

- Conservation/Management Plans;
- Heritage Impact Statements;
- Archaeological Surveys;
- Re-use Options Study;
- Structural Engineers Report.

**1.2 Conservation Works**

This category is best suited for those who wish to attract financial assistance for part of the costs associated with the conservation works on a heritage listed place.

Examples of these include:

- Re-pointing and re-lining;
- Fencing repairs and/or reconstruction;
- Paint removal;
- Re-roofing and guttering for roofs and verandahs;
- Chimney repairs;
- Removal of render;
- Reinstatement of facades.

## **2. ELIGIBILITY**

### **2.1 Eligible Applicants**

- 2.1.1 Property owners whose place is on the City's Municipal Heritage Inventory and/or the State Register of Heritage Places and whom have not incurred a rates debt with the City; or
- 2.1.2 Community group or non-profit groups who have assumed a long term lease or legal agreement for the maintenance of a building listed on the City's Municipal Heritage Inventory and/or the State Register of Heritage Places and whom have not incurred a rates debt with the City.

Note: Proposed works at buildings that are strata-titled will be considered as one project.

### **2.2 Ineligible Projects**

- 2.2.1 Equipment costs that will be used after the project finishes;
- 2.2.2 Retrospective funding (i.e. work that has been completed prior to a Heritage Assistance Fund application being submitted and acknowledged); and
- 2.2.3 New additions or extensions.

## **3. SELECTION CRITERIA**

- 3.1 The proposed work must contribute to the retention of the heritage listed place as well as improve the appearance of the place when viewed from the street;
- 3.2 Works must be sympathetic to the character and significance of the heritage listed place;
- 3.3 Consistency with the accepted conservation principles outlined in the Burra Charter 2013;
- 3.4 The extent to which the proposal is consistent with the City's Residential Design Guidelines and Heritage Management Policies;
- 3.5 The urgency of the conservation work;
- 3.6 Applicant that have not previously received Heritage Assistance Fund will be given preference.

## **4. FUND DETAILS**

- 4.1 The Heritage Assistance Fund is run twice a year, at the discretion of the City;
- 4.2 The funding available in each round will generally consist of half of any annual funding, at the discretion of the City;

- 4.3 Eligible projects are entitled up to 50% of the total cost up to a maximum of \$5,000. This may be varied from year to year at the discretion of the City; and
- 4.4 Projects are required to be completed and a receipt provided to the City by no later than 30 June in that financial year.

\*Please further refer to Appendix 1 – Application Process, Appendix 2 – Conditions of Funding Form and Schedule of Works.

<b>Date Adopted: 5 April 2016</b>
<b>Date Amended: 26 July 2016</b>
<b>Date Reviewed:</b>
<b>Date of Next Review: 5 April 2021</b>

NOTE: THIS HAS NOT BEEN ADOPTED AS A CITY OF VINCENT LOCAL PLANNING POLICY.

## **Appendix 1 – Heritage Assistance Fund Application Process**

### **Stage 1 – Submission**

Submit the Application Form and supporting documentation.

### **Stage 2 – Site Visit**

The City's Heritage Officers will meet with you on site to discuss the detail of the proposed work if necessary.

### **Stage 3 – Acknowledgement letter**

After the site visit, the Heritage Officers will undertake assessment on the application and will send the applicant an **acknowledgement email/letter** to confirm if the conservation works are eligible or not.

#### **Important Note**

*Applicants may, at their own discretion, commence any works following the receipt of the acknowledgement email/letter. As the funding is not confirmed at that stage, the City takes no responsibility for any funding shortfall outside the final approved amount of funding.*

*If the applicants choose to commence the works prior to the closing date of each round without confirming the final approved amount of funding, the applicants have to complete and return (1) Conditions of Funding and (2) Schedule of Works to the City at this stage. The conservation project works can be started on an agreed commencement date between the applicant and the City according to the approved documentation.*

### **Stage 4 – Assessment and Letter of Offer of Funding**

After the closing date of each round, the Heritage Officers reserve the right to make a decision on fund allocations based on the following:

1. The number of applications received in that round;
2. The proposed cost of the projects; and
3. The availability of the funding for that round.

The Heritage Officers will inform all applicants via a **letter of offer of funding** about the approved amount of funding.

### **Stage 5 – Conditions of Funding and Schedule of Works**

Successful applicants complete and return (1) Conditions of Funding and (2) Schedule of Works within 28 days of being notified of eligibility to the Heritage Assistance Fund to confirm the acceptance of the funding.

### **Stage 6 – Commencement of Works**

Once the applicants have submitted (1) Conditions of Funding and (2) Schedule of Works, conservation project works may commence according to the approved documentation.

### **Stage 7 – Upon Completion of Work**

- Applicant submits in writing a request for the reimbursement of funds.
- Present proof of payment to the City, a Certificate of Completion (if any) and photographs of the completed works.
- Arrange a site inspection with the Heritage Officers.
- A cheque/Direct debit of the agreed amount will be sent to the property owner.

### **DISPUTES**

The City of Vincent reserves the right to make the final decision in case of any disputes.

## Appendix 2 – Heritage Assistance Fund – Conditions of Funding & Schedule of Works

I/we \_\_\_\_\_ being the landowners of the heritage listed place at \_\_\_\_\_ accept the allocation of funds for the property and have read and agreed that I/we will abide by the conditions of funding outlined below.

### CONDITONS

1. A schedule of works shall be submitted to the City of Vincent along with this Conditions of Funding Form. The schedule of works is to document the detail of who is carrying out all the works, which have received funding, and the time allocated to complete the works.
2. The property owner must obtain all necessary planning and building licence/approvals required to carry out the works.
3. Work must start within six months of the funding allocation being made and the property owner must notify the Council of the start date.
4. Funds will only be spent on the project for which they were applied and approved by the City of Vincent.
5. The property owner must immediately advise the City of Vincent of any changes to the schedule of works, financial resources and arrangements connected with the project. Should the proof of expenditure not reflect the monies and works as approved on the Heritage Assistance Fund application form and/or the Schedule of Works the following procedures may apply:
  - Only a proportion of the committed funds will be released to reflect the works actually undertaken;
  - A written agreement between the City and applicant will be prepared to reallocate the outstanding funds to other approved conservation works.
6. The property owner must contact the City of Vincent on completion of the project to organise a site inspection by one of the City's Heritage Officers.
7. The City will **NOT** pay the builder/contractor directly. The applicant is required to pay the builder/contractor directly and provide proof of expenditure of the funds to the City of Vincent. The City will then reimburse the applicant for the approved conservation works. Proof of expenditure must be submitted to the City of Vincent no later than 28 days after the completion of the works and shall include:
  - Invoice made out to the applicant with appropriate details of the specific work carried out, as outlined in the schedule of works;
  - Proof of payment by applicant i.e. a receipt; and
  - Photographs of the completed works.

8. If an extension of the funds period is being sought the property owner will notify the City of Vincent in writing not less than 14 days prior to the original completion date of the project.
9. The City of Vincent reserves the right to use the documentation or conservation works to promote good heritage practice within the City of Vincent.

Signed: \_\_\_\_\_ date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Name: \_\_\_\_\_

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### SCHEDULE OF WORKS

Owner/Applicant: \_\_\_\_\_

Property Address: \_\_\_\_\_

Schedule of Conservation Works:

\_\_\_\_\_

Appointed Contractor: \_\_\_\_\_

Date of Commencement of Works: \_\_\_\_\_

Approximate Date of Completion: \_\_\_\_\_

Have there been any changes to the proposed financial arrangement (quote) and or scope of works as outlined on the Heritage Assistance Fund Application form?

- No
- Yes (please provide explicit detail)