

# HERITAGE ASSISTANCE FUND

## GUIDELINES

2023/2024

### BACKGROUND

The 2023/2024 Heritage Assistance Fund is established to financially assist the owners and lessees of heritage items. The fund offers a grant to assist in repair and maintenance work, preparation of Conservation Management Plans (CMP), Costed Maintenance Plans, and/or Schedules of Works.

Eligible properties are those listed as a heritage item or within heritage conservation areas in the Penrith Local Environmental Plan (LEP) 2010.

### AIM OF THE FUND

- To encourage the repair and maintenance of heritage items and promote a positive community attitude to heritage conservation;
- Provide a mechanism to achieve the conservation of specific elements that are considered important to an area such as streetscapes, building fabric and facades, and physical evidence of heritage items located within the Penrith Local Government Area (LGA);
- To encourage the preparation of Conservation Management Plans that inform caretakers of the heritage values on site, how these values can best be preserved, potential opportunities, constraints and required maintenance works.
- To encourage long term Costed Maintenance Plans to financially prepare caretakers of Heritage items for ongoing costs.
- Promote a greater awareness, understanding and appreciation of heritage within Penrith City.

### INVITATION TO APPLY

Funding is generally offered on a \$1 for \$1 basis where Council contributes half of the cost of the proposed projects. Works can range from \$1,000, up to \$5,000 however consideration will also be given to projects that are more significant with preference given to individually listed heritage items and funding for commission of Conservation Management Plans and Costed Maintenance Plans.

The amount of funding offered will be based on an assessment of the applications submitted, how they satisfy the assessment criteria as

well as an assessment of the value of the contribution of the proposed works to achievement of the aims of the fund. Funding will be issued to successful applicants upon completion of all approved works/documents.

It is important to demonstrate that the proposal is essential and appropriate to the conservation of the item, for example, if the project is to rebuild a verandah around the house, ensure it is the same as the original.

Should you wish to make an application for funding please ensure it is received by Council no later than the 14 July 2023.

## ELIGIBILITY FOR FUNDING

- Projects can involve the repair, maintenance or alteration (see clause 5.10 of LEP 2010) to a domestic scale (houses, sheds, garages etc) heritage building in the Penrith Local Government Area.
- Projects can include structural works through to final external painting. These include fences, verandahs, roof cladding and decorative detail.
- The item should be a heritage item or in a heritage conservation area listed under the Penrith LEP 2010.
- All owners, lessees and not-for-profit organisations are eligible (excluding commercial businesses or alike, council and other government departments). In some cases, properties owned by a trust where the use is residential may be considered.
- Projects can involve the preparation of a Conservation Management Plan by a suitably qualified heritage professional and in line with the NSW Office of Environment and Heritage guidelines for Conservation Management Plans.
- Projects can involve the preparation of a Costed Maintenance Plan (pending evidence that a Conservation Management Plan is already existing or to be prepared in conjunction with the Costed Maintenance Plan). The Costed Maintenance Plan is to be a minimum of 20 years forward, sufficiently detail room by room and should be prepared by a Heritage Architect in conjunction with a Quantity Surveyor and other associated professionals where necessary (i.e. engineer, arborist, etc).

## FUNDING WILL GENERALLY NOT BE PROVIDED FOR THE FOLLOWING:

- Where funding is reasonably available from another source or where substantial government assistance has been provided

- Where the applicant has yet to complete other assisted projects (beyond the timeframe given).
- Where the proposed works will adversely impact the significance of the item.

## ASSESSMENT CRITERIA

The following criteria provide a useful checklist for assessing projects:

- Projects that clearly compliment broader conservation objectives, e.g. projects that implement key findings of heritage studies or conservation management plans/costed maintenance plans.
- Projects that conserve the identified heritage significance of the item.
- The applicant's ability to demonstrate technical and financial responsibility regarding the project, and demonstrate ability to complete the project within 6 months after approval from Council.
- The degree to which the applicant will financially contribute half of the cost of the project.
- Projects which would encourage the conservation of other heritage items;
- Projects of demonstrated value to the community, e.g. the restoration of an important local heritage house.
- Projects that are highly visible to the public, e.g. the replacement of a verandah to a building in a main street location.
- Projects subject to conservation controls where the owner is able to show hardship arising from conservation work required to the item.
- Urgent projects to avert a threat to a heritage item.

## FUNDING FOR OTHER REPAIRS

Consideration will also be given to the allocation of funds where works that could not wait for the allocation of funds have been carried out to a heritage item. Applications for assistance in this regard must comply with the following:

- The works were carried out no more than 12 months prior to the date of the current invitation for assistance
- The works could not have been delayed to apply for the Fund, by using temporary measures to alleviate the situation
- The application is supported by written and photographic evidence to demonstrate the above
- Two quotes were obtained prior to repair works being carried out and are submitted with the application
- Retrospective funding will not be granted for standard conservation works that are not considered to be urgent

## LEVEL OF FUNDING AVAILABLE

The funding will be offered on a \$1 for \$1 basis. Works generally range from \$1,000 up to \$5,000 however consideration will also be given to projects that are more significant with preference given to individually listed heritage items and funding for commission of Conservation Management Plans and/or Costed Maintenance Plans. The maximum level of funding per project will be decided at the discretion of Council and will be based on an assessment of how the project meets the criteria and contributes to the achievement of the aims of the fund.

The funding will be issued upon completion of all approved works/documents.

## TIMING & PAYMENT OF PROJECTS

From the date of receiving advice of a successful application from Council for heritage assistance funding of a Conservation Management Plan and/or Costed Maintenance Plan, or other works, a Development Application (DA) to council (if applicable) is to be submitted within 3 months. Identified works are to be completed and claimed by the 31 June 2024.

## WHAT YOU NEED TO DO

### CONTACT THE COUNCIL.

If you require further clarification on the eligibility of the project and/or to discuss the intended conservation works, please don't hesitate to contact Council during normal business hours on [4732 7991](tel:47327991).

Please note that works to be funded under the assistance program would normally consist of repair or maintenance works that may require Council approval via the development application process.

To apply for the Heritage Assistance Funding you need to read the guidelines and follow the link to fill out the application form through: <https://penrith.smartygrants.com.au/HAF2023>. For more information, contact Development Services during normal business hours on [4732 7991](tel:47327991).

## BACKGROUND RESEARCH

It will assist your case if you can properly demonstrate why the work you propose is appropriate from a heritage point of view.

You can access the Heritage Inventory Information Sheet (SHI) for your property at the following webpage link:

<https://www.environment.nsw.gov.au/heritageapp/heritagesearch.aspx>

It may also be helpful to undertake some research, e.g. the Penrith Local Historian at Penrith Local Library and Historical Societies have information on a local history and may be able to obtain some old photographs.

## DETAILS OF PROPOSAL

For a Conservation Management Plan and/or Costed Maintenance Plan the following must be provided:

- Names of the suitably qualified and reputable heritage consultant who will write the plan.
- A quote specifying that for a Conservation Management Plan that the Office of Environment and Heritage guidelines will be used.
- If it is a Costed Maintenance Plan, the consultant is to include a brief run down (in their quote) of what will be contained in the contents of the report. The plan will be required to be extremely detailed (room by room, internal & external and gardens) and would be akin to a vehicle log book as to when maintenance is to occur to the heritage building at nominated dates. The proposed works would also be costed with input from a Quantity Surveyor and associated professionals where required (i.e. engineers, arborists, etc).
- If it is a Costed Maintenance Plan, the Conservation Management Plan that is to be used to guide the new plan will need to be supplied (if not being commissioned simultaneously).

For other works it will need to be decided in detail any works to be carried out. The proposed works are to be clearly explained, where there is no Conservation Management Plan guiding the works, the following must be provided:

- A written description and schedule of the specific works to be undertaken
- A photograph of the building, and close-ups of any job to be done
- Plans or sketches which illustrate the nature, extent and location of the work

- A schedule of materials and colours to be used in the proposed works, if applicable (sample brochures from builders or suppliers can be used)

## QUOTES

Applications are to be supported by quotes and it is suggested that at least two quotes are obtained.

A list of consultants is available through the NSW Office of Environment & Heritage:

<https://www.environment.nsw.gov.au/heritageapp/HeritageConsultantsDirectory.aspx>

A list of tradespeople is also available through NSW Office of Environment & Heritage:

<https://www.environment.nsw.gov.au/heritageapp/HeritageConservationDirectory.aspx>

It is necessary that the consultants who are preparing quotes for the Conservation Management Plan and/or Costed Maintenance Plan have the necessary qualifications and experience in respect to producing these documents. It is also preferable that the tradespeople selected to undertake the work have the necessary qualifications and experience in working with heritage buildings.

## APPLICATION FORM

Fill in the online application form at:

<https://penrith.smartygrants.com.au/HAF2023>

## SELECTION PROCESS

Following receipt of the applications a selection panel will assess the proposals against the eligibility and assessment criteria contained within these guidelines.

The final recommendations selected by the panel will then be put forward to Penrith City Council's Heritage Advisory Committee for comments.

Finally, the recommendations from the panel and the Heritage Advisory Committee will be reported to Council for endorsement.

This process may also involve an inspection of the property. Applicants will then be notified of the outcome of their application.

*N.B. By lodging an application for funding; you have entered into an*

*agreement with Council that will commence if your application is successful.*

At each stage of the works Council staff may undertake an inspection. This is necessary to ensure that the work has been carried out as per the agreement. Receipts for the work are also required to be lodged with Council at the completion of the works and prior to receiving funding.

Should you require further information in relation to Council's Heritage Assistance Fund or require assistance in completing the application form, please contact Development Services on (02) 4732 7991.