

HERITAGE ASSISTANCE FUND (HAF) GUIDELINES

ROUND 2 - 2019/2020

BACKGROUND

The 2019/2020 Heritage Assistance Fund is established to financially assist the owners and lessees of heritage items. Due to remaining available funding, round 2 offers a grant to assist in the preparation of Conservation Management Plans (CMP) and/or Costed Maintenance Plans for future works.

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

AIM OF THE FUND

- 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.
- To encourage the long-term strategic repair and maintenance of heritage items, as guided by CMPs, and promote a positive community attitude to heritage conservation;
- Promote a greater awareness, understanding and appreciation of heritage within Penrith City.

INVITATION TO APPLY

Funding is available for individually listed heritage items for the 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 assessment of the value of the achievement of the aims of the fund. Funding will be issued to successful applicants upon completion of all approved documentation.

Should you wish to make an application for funding please ensure it is received by Council no later than the 1 November 2019.

ELIGIBILITY FOR FUNDING

- The item should be a heritage item 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 should 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 also 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 conjuncture 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/documentation proposes works that will adversely impact the significance of the item.

ASSESSMENT CRITERIA

The following criteria provide a useful checklist for assessing projects:

- Projects should 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 also 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 conjuncture with a Quantity Surveyor and other associated professionals where necessary (i.e. engineer, arborist, etc).
- 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 a suitable timeframe after approval from Council.
- The degree to which the applicant will financially contribute half of the cost of the project (subject to scale of project).
- Projects which would encourage the conservation of other heritage items;
- Projects of demonstrated value to the community.

LEVEL OF FUNDING AVAILABLE

The funding will be offered on a \$1 for \$1 basis. Works generally range from \$1,000 up to \$10,000 however consideration will be given to projects that are more significant. 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 documentation.

WHAT YOU NEED TO DO

CONTACT THE COUNCIL.

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

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/heritage19CMP>

For more information, contact Development Services during normal business hours on [4732 7991](tel:47327991).

BACKGROUND RESEARCH

You can access the Heritage Inventory Information Sheet (HIIS) 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).

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>

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.

Note: All quotes should specify a timeframe for completing the plans.

APPLICATION FORM

Fill in the online application form at:

<https://penrith.smartygrants.com.au/heritage19CMP>

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 (as required). 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/documents and prior to receiving funding.

NB: Due to the rigorous assessment process of funding applications, please allow approximately 3 months to receive a response regarding the status of applications submitted.

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.