



LOCAL HERITAGE CONSERVATION GRANTS SCHEME GUIDELINES

1.0 INTRODUCTION

A conservation grant is available to support applicants to undertake repairs and maintenance work which will conserve the heritage value of their heritage listed properties. Applicants will need to demonstrate their projects will preserve the heritage fabric of the building and contribute to the streetscape of the Shire to be **eligible for the Local Heritage Conservation Grants Scheme** (Grants Scheme). Eligible properties must be privately owned and on the Municipal Heritage List.

2.0 OBJECTIVE

The objective is for the Shire to provide practical support for owners of heritage listed properties to undertake repairs and related maintenance works to heritage listed properties in an appropriate, and timely manner.

Grants would provide financial assistance to owners to partially recoup the cost of heritage works to conserve listed properties. This may involve either construction work or the preparation of heritage conservation plan reports.

3.0 PRINCIPLES

Heritage properties should, as viewed from the street, enhance the streetscape and character of Peppermint Grove. Applicants may seek a grant, if the conservation works undertaken are for the part of the building in the public view and will support and conserve the heritage value of the property and (where the nature of the work makes this a requirement) have received Shire Planning and Building Approval.

Application for grant funding must be submitted and approved by the Shire in advance of any works and should be accurately estimated on the basis of written quotes from builders or heritage related tradespersons.

Once works subject to the grant application have been completed and a full set of documented costs provided to the Shire for acquittal the approved grant may be disbursed. (Note: the substantiation of cost quotes must be clearly documented as part of justification of a grant application).

The following also applies:

1. The eligible properties must be on the Municipal Heritage List;

2. A grant is available for amounts up to \$6,500 on a dollar- for- dollar matching basis, per grant application per property, and is subject to Shire funding constraints. Funding will be based upon a 'first in' basis until the budgeted allocation for grant funding is exhausted. Unallocated grant funding may be transferred to the budget allocation for the following year;
3. Only one heritage conservation grant will be approved per financial year for any one property.
4. For significant 'staged' projects consideration may be given to more than one grant application on a case-by-case basis. Development applications are encouraged to include a staging plan and disclosure of any intention to lodge more than one grant application.
5. Repairs and other works should address protection and conservation of the fabric of a listed property, including conservation or replacement of authentic materials;
6. Work is to be certified/conducted by a recognised professional (heritage architect or builder) in accordance with Approvals and Approved Plans;
7. Updates to the Local Heritage Survey should be made upon completion of works.
8. The CEO of the Shire of Peppermint Grove, will administer the Grants Scheme and report to the Council as required.

4.0 ELIGIBILITY CRITERIA

The following selection criteria is to be met by applicants, the:

1. Property must be on the Municipal Heritage List and not eligible for other State Government grants schemes;
2. Owner must be the applicant.
3. Plans for the work must be already approved by the Shire such that all works are to repair and enhance the exterior of the property and/or in a place which is visible from the Streetscape; (interior work is generally not eligible)
4. Works must be assessed to be satisfactory in terms of heritage value, craftsmanship and integrity;
5. A heritage conservation grant has not been approved within the same financial year for the property.
6. Grant applications are subject to the Shire's budget constraints and the Shire may vary allocation from year to year according to availability of funds;
7. Copies of all documentation outlined in section 5.0 (below) is to be provided to the Shire; and

8. Works are to be consistent with the heritage objectives outlined in the *Burra Charter 2013* (as amended).
9. Should an approved project stall, or be abandoned, the applicant is to formally advise the Shire so the Heritage Grant monies may be conserved or re-allocated.

5.0 APPLICATIONS

Owners/applicants wishing to make application shall apply using the prescribed form and provide the following details where appropriate:

1. Details of all Planning and Building Approvals and any Heritage Architect Reports;
2. Schedule of works, timetable for completion (to be within 24 months unless otherwise varied by the CEO) ,
3. Plans endorsed by a Heritage Architect or Builder for the proposed heritage conservation works;
4. Details of all builders or tradespersons and their credentials for undertaking work of a heritage conservation nature; and
5. Scope of the heritage consultant report brief where the grant is intended to be used for research and conservation planning.

The CEO will prioritise the applications by reviewing them in relation to the Grants Scheme eligibility criteria, merit of the work proposed and relative merit with respect to competing applications. The CEO also reserves the right to place greater emphasis on particular eligibility criteria of the Grant Scheme. There is no guarantee that applications that meet the eligibility criteria will receive a grant, as it is subject to the relative merit of each application, and budget availability.

The Grant Scheme funding will be available as reimbursement for spending following completion of works to the satisfaction of the Shire.

6.0 WORKS NOT ELIGIBLE FOR THE HERITAGE GRANTS

- Retrospective funding is not available for any works that were completed prior to a Grant Scheme application being submitted to the Shire;
- Applicants who have outstanding rates to the Shire for the prior year either at the time of lodging the grant application or at the time of seeking payment;
- No internal renovations, extensions or new additions, or landscaping projects are eligible for the grant.

7.0 DISBURSEMENT AND ACQUITTAL OF GRANTS

The Heritage Grant recipient shall provide documentation of works and acquittal of quotation amounts against actual invoiced amounts to the Shire as the basis of initiating disbursement of the grant payment. Where a Building Permit was required, this is to be done at the time of BA7 lodgment, otherwise documentation is due upon completion of all works.

Where the grant disbursement is approved for written research and conservation management reporting there shall be a copy of the completed report provided to the Shire as well as copies of invoiced fees from the Heritage Consultant to substantiate the quotation amount which was the basis for obtaining Heritage Grant approval.

A written receipt is to be provided for all grant disbursements to the Shire. The following will be required to be submitted when seeking payment of Heritage Grant:

1. Schedule of completed works (with itemised costings) and receipts;
2. Report from Heritage Architect or Builder on completed work;
3. Reference to any Shire issued Approvals/Permits for the works; and
4. Updated drawings or records to be added to the Local Heritage Survey data base.

8.0 APPLICATION DATES

Grants will be awarded on merit (subject to available budget).

9.0 TIMELINE

The Grant Scheme is managed by the Manager of Development Services.

The administration of finances associated with the disbursement of grants is managed by the Manager of Corporate and Financial Services. The following process is oversighted by the CEO:

Step 1	Submit Application Form to the Shire of Peppermint Grove at PO Box 221, Cottesloe WA 6911 or Email to: admin@peppermintgrove.wa.gov.au
Step 2	The Shire reviews all applications for Grants Scheme funding against the eligibility criteria and makes determinations on the funding allocations according to a competitive merit-based selection process.

Step 3	<p>A letter of offer is sent to Applicants to advise of grant funding decision.</p> <p>To accept the Grants Scheme offer, the successful applicant is required to complete and return the 'acceptance of grant offer', which reaffirms the stated purposes of the Heritage conservation project and outlines a work schedule outlining the project timeframe to be completed within 24 months of the Grants Scheme allocation (unless otherwise varied by the CEO).</p> <p>Note: Application for funding the Grants Scheme carries no obligation on behalf of the Shire to fund or otherwise advance payment to meet project costs until the CEO has approved the grant allocation and only if criteria outlined in the "Conservation Heritage Grants Scheme Memorandum of Understanding" is signed by the applicant.</p> <p>Funding allocation is to be determined by budget, on-merit selection and capability to deliver the stated heritage conservation work on time and budget to match the Application prospectus.</p>
Step 3	<p>The completed 'acceptance of grant offer' is returned to the Shire for endorsement. Applicants will be notified about the allocation of a Grant by the CEO in writing.</p>
Step 4	<p>Project works are to be completed according to the above documentation.</p>
Step 5	<p>Applicants to notify the Shire once work is completed to arrange an inspection of the works and provide proof of payment for completed heritage works.</p>
Step 6	<p>Evaluation of completed work to be undertaken by the Shire to ensure compliance with the conditions of the Grant Scheme.</p>
Step 7	<p>If works are compliant, then the Shire will issue the agreed amount by direct debit to the property owner.</p>

10.0 IMPLEMENTATION

The Grants Scheme will be promoted in the local newspapers, the PepTalk Newsletter and mailed to properties that are on the Heritage List.



**LOCAL HERITAGE CONSERVATION GRANTS SCHEME
APPLICATION FORM**

The local heritage conservation grants scheme provides financial reimbursement to applicants who intend to undertake conservation projects on the exterior of properties they own which are listed in the Municipal Heritage List (available on the Shire website at www.peppermintgrove.wa.gov.au)

APPLICANT

Property Owners Name:

Phone Number:

Email:

Postal Address:

PROPERTY DETAILS

Address:

Heritage status of the property (tick appropriate description):

Included on the Shire of Peppermint Grove's Heritage List; and/or

State Register of Heritage Places

Have you previously received heritage assistance funding for this property:

Yes

No

Provide a brief description of intended heritage conservation works:

Are the proposed works to the property visible from the primary or secondary street and how do they contribute to conserving the heritage features of the property?

What are the total costs for the proposed works? (Attach an itemised summary and written quotes)

Estimated time frame of proposed work (up to 24 months):

Start Date: _____ Finish Date: _____

Checklist

Please attach the following documentation with your application:

- At least two written quotes for the proposed works;
- A summary of the project, including detailed descriptions, plans, drawing (if appropriate) and anticipated timeframe; and
- Send to the Shire of Peppermint Grove, at 1 Leake Street Peppermint Grove, WA 6011.

Applicants Signature

Property Owners Signature

Date

Date



REFUND REQUEST or Reimbursement

Please ensure all sections are completed.

Refund Details	NAME: _____	
	SIGNATURE: _____	
	ADDRESS: _____	
	PHONE: _____ Email: _____	
	ABN# _____ GST Registered Yes <input type="checkbox"/> No <input type="checkbox"/>	
Payment Method	<input type="checkbox"/> EFT Account Name: _____ BSB Number: _____ Account Number: _____	<input type="checkbox"/> Cheque
OFFICE USE ONLY	<input type="checkbox"/> Bond Manners Hill Park (MHP) GL 51211 Amount: \$ _____ Approval: _____ Date Paid: _____	
Type of Refund (Tick One)	<input type="checkbox"/> Heritage Grants Scheme – GL 38260/1002/129 Amount: \$ _____ Date Approved: _____ Grant Approval Attached Yes <input type="checkbox"/> No <input type="checkbox"/>	
	<input type="checkbox"/> Dog Sterilisation Refund GL 28300/0503/129 Amount: \$ _____ Approval: _____ Date Paid: _____ Name of Dog: _____ Certificate Attached YES <input type="checkbox"/> NO <input type="checkbox"/>	
	<input type="checkbox"/> Expense Reimbursement- GL ACCOUNT Amount: _____ Approval: _____ Date Requested: _____ Relevant Information: _____	
----- Accounts Use Only -----		
Refund Document No.: _____		Document Date: _____
Existing Account in CouncilFirst	<input type="checkbox"/> Yes (Vendor Account #: _____) <input type="checkbox"/> No (Complete Payment Details and get approval to set up vendor account)	
Approval to set up new Vendor in Council First:	_____ Signature Manager Corporate Services	_____ Date
Vendor Account Setup <i>(if Applicable)</i>	Vendor No.: _____	Created by: _____