

NORTH SHORE HERITAGE TRUST GUIDELINES



The Trust is an independent charitable organisation established to retain heritage in North Shore area and raise awareness of the community's history by assisting in the conservation of places of heritage value.

This guide contains information about the Trust and its functions. It is written to assist applicants who wish to apply for funding from the Trust and contains the following sections.

- 1. Who Can Apply**
 - 2. General Guidelines**
 - 3. General Assessment Criteria**
 - 4. Application Closing Dates**
 - 5. Application Guide**
 - 6. Application Form**
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1. Who Can Apply

You can apply to this Trust if:

- You own or occupy a site or building listed in the "Schedule of Buildings, Objects and Places of Heritage Significance" in the *Auckland Council District Plan (North Shore City)*.
- You own or occupy a site or building in the Residential Zone 3 (Built Heritage) in the District Plan and if the place is identified by the community as providing a benefit to the public.
- You are pursuing a heritage related project which will further the charitable objects of the Trust.

As the Trust has limited funds, priority will be given to applicants who own sites or buildings listed in the Auckland Council District Plan (North Shore City).

2. General Guidelines

Generally, the following guidelines will be used by the North Shore Heritage Trust when considering funding applications.

- The grants will generally be limited to \$5,000 and, as a guide, may cover up to 10% of the cost of the project.
- Grants over \$5,000 will be bound by a caveat registered against the title of the property identifying the Trust's interest in the restored parts of the building.
- Funding will not be granted to any project that has already been completed at the time the Trustees meet to consider the application relating to that project.
- Preference will be given to applicants who have not previously received funding.
- All project works must be completed to the satisfaction of the Trustees or of a person nominated by the Trustees before any grant payment is made.

The North Shore Heritage Trust will generally not make grants to

- The building of historic replicas
- The installation of amenities such as kitchens, toilets, etc.
- Projects that get a negative report from a conservation professional
- Tree protection and maintenance.

3. General Assessment Criteria

In general the Trustees will take into account the following factors when considering a fund application.

- a) The extent to which the proposed project will educate the people of the North Shore area and raise public awareness of the historical and heritage significance of the building or site. Whether the project undertaken will beautify and improve the North Shore area for public enjoyment;
- b) What steps the applicant proposes to take in terms of satisfying (a) above, including, by way of example, allowing public access to the property and publicising the historical and heritage significance of the building or site and the project undertaken;
- c) The principles of the New Zealand ICOMOS charter;
- d) The ability of the application to meet the long-term protection of the place and to recover the significance of the place;
- e) A report from a conservation professional on whether the restoration work follows recognised conservation principles and whether it will benefit the heritage character of the community;
- f) The urgency of the work; and
- g) Any other factors relevant to determining whether, and to what extent, funding the project will further the charitable purposes of the Trust.

4. Application Closing Dates

Application dates will be published in the local paper. Alternatively you can register your interest with the Auckland Council's Senior Built Heritage Specialist, Tony Barnes on 09 301 0101 and you will be notified of the application dates when they are available.

5. Application Guide

These guidelines will help you fill out the application form. Please refer to them when filling out the form, as the more information you provide, the easier it will be for the North Shore Heritage Trust to process your application. Use separate sheets if necessary.

The Auckland Council Senior Built Heritage Specialist, Tony Barnes is available to assist you in completing the application form by telephoning 09 301 0101.

The application is divided into 7 parts, which outline the information we require to assess your application.

- **Part 1** tells us about you and provides a contact with whom we can communicate during the assessment if need be.

Providing a brief project description will give us an idea of what you are setting out to achieve.

- Completing **Part 2** will identify the property location, clarify its ownership (confirmed with attached copy of the certificate of title), make us aware of its significance and current use, and provide us with a better understanding of the property.
- **Part 3** asks for information about the project that you are applying for funding for. This includes
 - description of the work you intend to carry out
 - project time frames
 - if a conservation architect will be employed, and
 - who will be supervising the project.

Photos are particularly helpful for getting an overview of the site, for assessing the general condition of your place and for understanding how the project will work. Please include photos to illustrate your application. Also include other attachments such as working drawings or specifications if available.

A copy of the project memorandum or a letter of support from Council that they have seen the proposals and are supportive of them is required in order to process the application.

- Filling out **Part 4** will inform us of any work that has been previously carried out on the property, and what the cost of this was.
- **Part 5** is concerned with how the project will benefit the community. Priority will be given to funding that demonstrates “public good”. It may be that the work will improve the appearance of the neighbourhood, or by returning lost elements to the building you reveal the historic character of the community.

Your application will be helped if you are able to suggest options to increase the public benefit of your project. If the changes are on the street frontage this may be self-evident. If the changes are not easily noticeable to the public it may mean agreeing to allow public access to the building or agreeing to publish material about the historic significance of the building and the project that has been undertaken.

- **Part 6** asks you to outline the expected cost of the project, other sources of finance available (including your own contribution), and how much funding assistance you seek from the North Shore Heritage Trust. We also want to know what will happen to the project if you don't get the full amount applied for. Will it still go ahead, and how do you intend to meet any shortfalls?
- **Part 7** enables you to include any other compelling information or comments in support of your project that may help us in the assessment of your application.

NORTH SHORE HERITAGE TRUST APPLICATION FORM



Part 1: Your Details

1. Name:
2. Contact address:
3. Phone:
4. Fax:
5. Email:
6. Provide a brief description of the project this grant will be used for:
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Part 2: The Property

7. Address of property to which the application applies:
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8. Name of owner:
9. Telephone: Day Night
10. Address (if different from above):
11. Status of Ownership:
Private Trust Company Other (please specify):

Attach a copy of the certificate of title. If you do not own the property also include evidence showing entitlement to use the property.

12. Is the property scheduled by the Historic Place Trust, the Auckland Council District Plan (North Shore City) or does it fall in that plan's Residential 3 zone?
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13. Significance of the property: Provide a brief statement explaining why the property is important (include photos if necessary).
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14. What is the building currently used for?
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If you have a conservation plan prepared for the building, please append it to the application.

Part 3: Your Project

15. Work for which assistance is sought (*please use any photos or other attachments to illustrate*)

a) Description of Project

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b) Proposed remedial work: (*include working drawings and specifications where relevant*)

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16. When do you intend to begin the work?

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17. When do you expect the work to be completed?

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18. Will you be employing a conservation architect?

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19. Who will be supervising the project?

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20. Please include a letter from a conservation professional on the appropriateness of the work being undertaken.

21. Please append a copy of the project information memorandum, or alternatively supply a letter of support from Council that they have seen the proposals and are supportive of them.

Part 4: Previous Work

22. What work has been carried out on the property previously and at what cost? (*Use separate sheets if necessary*)

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Part 5: Community Benefit

23. Include an explanation of how the North Shore public will benefit from the project in terms of charitable purposes of the Trust. If necessary, also supply options for how that benefit may be increased (the application cannot be considered without this information. *Use separate sheets if necessary*).

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Please include 2 letters of support from members of the community.

Part 6: Funding

24. Total cost of the project: *(include quotes where relevant)* \$

Supply an itemised breakdown of the project costs

Indicate items you are applying for funding for

25. Other Sources of Finance Available for Project

\$ AMOUNT AVAILABLE

Other *(Specify)*

Own Contribution

Total

\$

TOTAL SHORTFALL

\$

26. If you are GST registered, please supply your GST number:

27. If you are a group or organisation applying, please supply audited copies of annual accounts.

28. Have you approached other funding partners, if so, please name the funding partners and the amount granted?

29. How much funding are you seeking from North Shore Heritage Trust? *(Note maximums available):*

30. What will happen to the project if you do not get the full amount you applied for?

31. How do you intend to meet any funding shortfall?

Part 7: Additional Information:

32. Please provide any additional information/comments in support of your application. *(Use extra sheets if necessary)*

DECLARATION

33. I hereby apply for a grant towards the cost of the works described in this application.

34. I have read and understood the North Shore Heritage Trust Policy (August 2009).

Full Name:

Status
(Owner/Agent):

Signature: Date: