



North Shore Heritage Trust

Policy

2009

1 General Policy Guidance

Clause 3 of the 2002 Deed of Trust document and Clauses 6 and 7 of the 2002 Funding Agreement document are the principal guides in the Trust's decisions regarding the allocation of funds to particular projects.

Work on a project for which a grant is provided should be started within the financial year of the grant, and completed within or before the following year.

2 Eligibility of Grants

The most important criteria for assessing the merits of a grant application shall be the Trust's charitable objects and purposes as set out in Clause 3 of the Trust Deed.

The applicant's details (private or public status) are typically of secondary nature to the decision to allocate a grant for a project.

However, churches and community groups that have charitable status are required to demonstrate that sufficient effort has been undertaken to engage other potential funding partners that are not accessible to private owners.

Applications from all applicants will be considered on their heritage merits, urgency of work required and funds available.

3 Conservation work appropriate for funding

Buildings in context

The heritage significance and value of a place is seen by the Trust in context of that place including its interiors and surroundings.

Conservation planning

Conservation planning is a primary area in which the Trust's funds are involved, and grants for conservation plans are encouraged.

Conservation work

All conservation work that can be identified as urgent or essential for the protection and safeguarding of the heritage values of a building or place will be considered in an application.

Roofing

A grant may be allocated for roofing if the project involves conservation of original roofing materials, or the restoration of original roof forms.

Additions and Alterations

Additions and alterations and work relating to these are not considered conservation work and will not be funded.

General Maintenance

The Trust does not fund general maintenance of a building or place that can reasonably be expected to be undertaken by the owner on a regular basis.

Education

Funds are also available for projects that are not building related but are consistent with clause 3.1.2 of the Deed of Trust.

4 Providing advice to Applicants to whom the Trust may not be willing or able to provide a grant

In the case of applications where the Trust is unable or unwilling to provide a grant for a project, it should seek to provide a reasoned response and guidance to the applicants on heritage matters.

5 Scoping of projects

The Trust makes the preparation of relevant background information (e.g. historic research, heritage significance and value) a condition of any grant.

Prior to work starting on a project for which a grant in principle has been made, it must be sufficiently scoped and documented so that the nature of the work to be undertaken and the work funded with the grant is well understood by all parties, including trustees, officers, applicants and contractors.

This is to avoid misunderstanding about:

- the exact extent of the work covered by the grant
- the consistency of the proposed work with that approved by the trustees in making a grant
- when the project may be eligible for a progress payment; and
- when a project is considered to be complete, and therefore eligible for final payment of the grant.

6 Grant Requirements and/or Conditions

Project Timing

Applications must be received prior to any work beginning. This will ensure for building projects that appropriate conservation work is carried out, and for the Trust to give appropriate heritage advice.

For educational projects it will warrant that work is focusing on the objectives of the Trust.

Project proposals/quotes

The Trust must have the conditions of any grant satisfied before final approval is given to a project.

Delegations

Every project will have at least two trustees delegated with authority to give final approval to projects approved in principle by the Trust.

Project identification

Prior to work beginning on any project for which the Trust has provided a grant, delegated trustees and/or advisory staff must carry out an initial site visit that is attended by the applicant and if required, any contractor(s). Any necessary alterations to a written description of the work, and/or quotation, must also be made to and agreed by the Trust before work has begun.

Project Monitoring

Where a grant in principle is made, delegated Trustees must conduct a site visit and be satisfied with work undertaken and invoices supplied by applicants, and approve the completed project before final payment of the grant.

Public accessibility

Conservation Plans and other written documentation produced with its funds must be placed where appropriate on Council's property files and in the local libraries.

Public accessibility may also include the publication of the project on the Trust's website and temporary signage on the property during the work undertaken.

7 Identification and Interpretation

During the course of work undertaken on a building or place, the Trust reserves the right to put up a publicly visible sign that informs about the project and the Trust.

Means of interpretation and identification might be set up after work has been completed should this be of educational and awareness building value.

8 Heritage-related Information

The Trust will seek to maintain a Heritage Trust website containing information on heritage matters it considers useful to applicants.

9 Payment of grants

Progress payments may be made, providing that an identifiable amount of the project had been satisfactorily completed.

Should up-front deposits be required the payment has to be made from the owner's contribution to the project.