

GRANT GUIDELINES AND STANDARD CONDITIONS

September 2015

1.0 BACKGROUND

- 1.1 Perth & Kinross Heritage Trust (PKHT) provides grants on behalf of the Scottish Ministers and Historic Scotland to assist owners or guardians of historic buildings located within the Perth Central and Kinnoull Conservation Areas who wish to maintain or restore the traditional character of their properties. The support is a part of the Scottish Government and Perth and Kinross Council's regeneration strategy.
- 1.2 Perth City Heritage Grants (CHGs) are awarded for eligible works carried out on listed buildings or non-listed historic buildings which contribute significantly to the townscape in the conservation areas or the setting of a listed building. However listed or conservation area status does not automatically qualify a building for a grant, the award of which is entirely at the discretion of PKHT.
- 1.3 Assistance will be targeted to eligible properties where there is greatest economic benefit and/or where there is potential for match funding to be secured from other sources of funding support. Other factors are considered and a 'score sheet' (Appendix 1) is used to rank properties and the support offered.

2.0 Eligible Works

- 2.1 Eligible works are those carried out specifically to maintain or restore the architectural and/or historic character of the building, using traditional materials and techniques. Applicants should contact PKHT to discuss proposals at the outset of a project. Eligible works might comprise:
 - *Conservation or restoration of slatework, cast-iron rainwater goods, leadwork, sash and case windows, internal decorative plasterwork and decorative stonework.*
 - *Work using traditional lime-based materials for pointing, harling, render or wash.*
 - *PKHT recognises that buildings with no current use can become 'at risk'. Grants may be available for proposals to restore or convert such buildings to a new use, for example the conversion of a mill to a shop or residential accommodation. Grant may be available for those elements of the project which maintain or restore the original character of the building but will not be offered towards new works or extensions.*
 - *Consultants fees are eligible (at 50% support) in larger projects where the consultant is appropriately experienced and their fee is not greater than 16% of the total contract value*
- 2.2 Routine maintenance work or that which is not directly a consequence of maintaining the historic character of the building is not eligible: for example re-painting, replacing slipped slates or dry rot treatment.
- 2.3 Work which has been granted Listed Building Consent by the Planning Authority will not necessarily fulfil PKHT's criteria for CHGs where a greater degree of historical accuracy in terms of materials and construction may be required. Grant will not be offered for elements in a scheme where the overall project does not meet with PKHT's approval.

2.4 Should a condition of grant conflict with those of a Listed Building Consent or Planning Permission further information should be sought from both PKHT and the Planning Authority.

3.0 Amount of Grant

3.1 There is no set percentage or amount of grant but up to a maximum of 75% of the eligible costs may be available. Different works attract different levels of support, at the discretion of PKHT.

3.2 The amount of grant will be based on (generally) three submitted competitive estimates or quotations or on a bill of quantities.

3.3 Grants for major restoration and conversion works will be assessed on the basis of evidence provided to demonstrate that funding is required to bridge the deficit between the cost of proposed works and the predicted end use development value – “the conservation deficit”. The grant level awarded will be subject to agreement on the level of development profit. There is no upper limit to these awards and intending applicants are advised to discuss their project with PKHT at the earliest opportunity.

3.4 Grant amounts from PKHT will be affected by the eligibility for other grants and the amounts actually received from other bodies for the works.

4.0 GRANT CONDITIONS

4.1 A formal written offer of grant will be made subject to the general conditions contained within these guidelines and specific conditions in relation to the work being carried out. Works must not commence before written notification of the outcome of the grant application has been received from PKHT. Retrospective applications for grant aid to works already underway or completed will not be considered.

4.2 Payment of the grant is made on the completion of all grant aided works to the satisfaction of PKHT and following the submission of a claim, in writing, supported by receipted invoices or other evidence of the costs incurred. Major grant awards will only be made on receipt of an independent valuation of the end use value of the property and evidence that it is not exceeding any agreed development profit.

4.3 Completion should generally be within one year of the offer unless previously agreed in writing.

4.4 Grants not acknowledged within two months, nor works completed within twelve months of grant will be withdrawn.

4.5 The applicant shall be responsible for making satisfactory arrangements for the proper maintenance of all works that involve PKHT grants for a period of up to 10 years. The applicant shall also be responsible for restoring or replacing any such work that may be damaged or lost through fire, theft or malicious damage unless PKHT agrees otherwise.

4.6 A PCHF contribution towards a project must be acknowledged by the applicant (and/or agent) in all reports and publicity connected with the property/project and on a commensurate basis with grants received from other grant-making bodies.

4.7 PKHT reserves the right to publicise in its Annual Report or elsewhere information relating to any project which it has supported.



- 4.8 PKHT makes some form of public access a condition of grant and expects that owners will be favourably disposed to requests from all legitimate interested parties to visit their building. Buildings will be asked to allow access on the Doors Open Days weekend in September.
- 4.9 Any proposal to dispose of the building by way of sale, exchange or lease within ten years of accepting the grant, or to extend, or alter it, at any time must be notified immediately to PKHT. Grant may be recovered at any time if any condition of grant is not complied with.
- 4.10 For grants of more than £25,000 a Standard Security and /or a Conservation Burden will be taken over the property to allow a recovery of grant to be considered if changed circumstances make this necessary.

5.0 PKHT's Discretion

Notwithstanding the above guidelines and conditions, PKHT reserves the right to exercise its discretion in respect of any application put before it. Each case is considered on its own merits and there should be no presumption that an award will or will not be made until a written decision has been issued.

6.0 COMPLETION OF APPLICATION FORM

6.1 Details of Works

Applicants should provide a detailed breakdown of all the proposed maintenance and repair work to the property. It is not acceptable to detail only the work believed to be grant eligible.

6.2 Competitive Estimates

To ensure value for money at least three competitive estimates or a priced Bill of Quantities, which include itemised costs, from recognised Contractors should be submitted. Particularly with specialist work this can be difficult and PKHT bear this in mind when appraising applications.

6.3 Final Cost is Lower

In the event that the final cost of the works is lower than the estimates PKHT will reduce its contribution pro-rata.

6.4 Final Cost is Higher

No further grant is payable by PKHT in respect of any costs that are additional to the estimated cost of the project unless written approval to such an increase has been issued by PKHT in advance of the additional work being carried out. Such approval will be given as long as the details of the additional work are acceptable. Applicants should be aware that changes which affect adversely the architecture or historical character of the building may have the consequence of reducing or terminating the grant offer.

6.5 Statutory Consents

All necessary consents and permissions, under planning and property law should be in place before commencing any works. PKHT does not support remedial works required under enforcement action from the Planning Authority or any work that is carried out without the relevant consents. Applicants must notify PKHT of any planning applications relating to the property in question or its setting that are proposed to be submitted in the five years following the date of the grant application.



6.6 Other Grants

All financial contributions to the project that are either secured or expected should be itemised together with details of applications which have been refused or for which the outcome is awaited.

6.7 Ownership and Insurances

It may be necessary to establish ownership of the property and whether sufficient insurance cover has been taken out to cover the cost of any works of restoration to the property, with continuation of insurance for 10 years, which may be necessary following fire, storm or other such accidental damage.

6.8 Start and Completion Dates

Applicants should allow up to 3 months for their grant application to be processed. ***Work should be completed and the grant claimed within twelve months of the offer unless otherwise agreed in writing by PKHT.***

6.9 Completion Survey and Payment

The completed works must conform to the plans and particulars submitted in support of the grant application unless previously agreed in writing. PKHT can inspect works in progress to check compliance and ensures, by visiting the site, that the work is fully completed before a payment of grant is authorised. Payment is initiated by a written claim, a satisfactory inspection and copies of receipted invoices equal to the eligible costs.

NB: It is the applicant's responsibility to comply with the guidelines and standard conditions of grant. Should clarification be required please contact:

Perth and Kinross Heritage Trust, The Lodge, 4 York Place, PERTH PH2 8EP
– 01738 477082 or 01738 477093 info@pkht.org.uk



SCORESHEET FOR GRANT APPLICATIONS To Perth City Heritage Fund Phase 2			
Max points per band	CRITERIA	One score per band	Points
	Use of Building or Site		
10	The repair and re-use of redundant or underused buildings	10	
	Dilapidated building being brought to an acceptable standard; will or could have repairs notice	8	
	Repair and conservation of buildings in retail or commercial use	6	
	Repair and conservation of buildings in residential use	4	
	Public realm enhancement	2	
	Listing		
5	A listed	5	
	B listed	4	
	C listed	3	
	Partnership and Community Project		
6	Applicants have formed a formal organisation to manage the repair and future maintenance of the building and project builds capacity for local heritage management.	6	
	Applicant is registered charity	4	
	Work categories		
6	For each of the following work elements (score 2 up to a maximum of 6): rainwater goods; roof repairs; stone repairs; ironwork; window repair or reinstatement; other eligible repairs.	6	
	Repair or reinstate an historic shop front	4	
	Townscape Impact		
8	High – ie frontage onto main shopping street or through route	8	
	Medium	6	
	Low	4	
	Additional considerations		
10	Professional team appointed	2	
	On Buildings at Risk Register	3	
	The project involves an element of heritage skills training *	Up to 10	
45			

* This is to encourage applicants to make heritage skills training an integral part of their project and could include using contractors with a good existing training record; assisting contractors to increase their heritage skills; supporting or creating Modern Apprenticeships; upskilling existing operatives through short courses etc. Applicants should provide supporting information for this category. The score will be awarded on a case by case basis.

Grant Scoring			
Eligibility Score	35-45	25-34	0-24
% towards Eligible Costs	<50%	26 to 35%	<25%