

NZHPT recommended approach for design and management of local authority heritage grant schemes

The following recommended approach is based on the National Heritage Preservation Incentive Fund Policy.⁹³ A copy of the fund policy is available, on request, from the NZHPT. Information about the fund and a copy of the application forms are available from the NZHPT's website:
http://www.historic.org.nz/heritage/funding_nhpif.html

Fund planning and administration

1. The scope and type of heritage grant scheme should be carefully considered with preliminary research being undertaken with regards to the need for the scheme and experience of other similar local authorities. The NZHPT should be contacted at the early stages of the project.
2. If Council is a registered charitable trust under the Charitable Trusts Act 1957, then it is possible that the income that is received to fund grants could be tax-free at source.⁹⁴ It is recommended that local authorities obtain advice from the IRD or a tax adviser on this matter.
3. Council should seek expert advice on any GST-matters relating to administration of the fund. Applicants may or may not be GST-registered.
4. The fund should be managed by a dedicated staff member within Council. It is preferable that they have some experience in historic heritage. The role of the dedicated staff member should include:
 - ▶ Preparation of the fund policy and application forms.
 - ▶ Establishment of the Heritage Fund Advisory Committee (the advisory committee) and liaison.
 - ▶ Seeking external advice from professionals with expertise in historic heritage.
 - ▶ Checking fund applications for sufficient information and eligibility.
 - ▶ Preparing fund applications for consideration by the advisory committee.
 - ▶ Preparing fund applications for approval by Council.
 - ▶ Preparing fund agreements for written signature by Council and applicants.
 - ▶ Seeking legal advice for fund applications and written agreements.
 - ▶ Monitoring funded works and progress.
 - ▶ Checking that work has been completed to sufficient standard and all paperwork is completed.
 - ▶ Preparing and obtaining authorisation for payment of fund to applicant.

⁹³ NZHPT, 'National Heritage Preservation Incentive Fund: Incentive Fund Policy', Approved by Minister for Arts, Culture and Heritage, 23 January 2007.

⁹⁴ George Farrant, 'Incentives – The Auckland Experience', Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

- ▶ Generally, monitoring the fund and providing progress reports to Council.
5. Council can delegate funding decisions to a dedicated sub-committee.
 6. Council should establish an external advisory committee that consists of persons experienced in historic heritage. The NZHPT is a member of a number of local authority heritage advisory committees and the NZHPT's participation should be agreed upon with the relevant NZHPT regional or area manager.
 7. The role of the advisory committee should include:
 - ▶ Providing advice on applications to the fund in terms of eligibility criteria relating to proposed conservation work.
 - ▶ Considering applications and making recommendations to Council.
 - ▶ Providing advice if funded works have been completed to sufficient conservation standard.
 - ▶ Providing general advice to Council on administration of the fund.

Fund policy

8. The heritage grant scheme should be established by a clear policy approved by Council (the fund policy).
9. The fund policy should be part of Council's Long Term Council Community Plan and related financial and reporting requirements of the Local Government Act 2002.
10. The fund policy should include critical information about the nature and type of the scheme, including:
 - ▶ The purpose of the fund.
 - ▶ How the fund will be administered.
 - ▶ How much funds will be available for distribution.
 - ▶ What type of funds will be made available.
 - ▶ What are the eligibility criteria in terms of historic heritage and conservation works.
 - ▶ How the Council will receive applications (the policy should include an application form template).
 - ▶ How the Council will assess the applications (process and criteria for assessment).
 - ▶ What conditions will be required in relation to approved grants.
 - ▶ How the fund will be monitored and reported.
11. The approved fund policy, application forms and information about application deadlines and decisions should be made available on Council's website.

Fund purpose

12. The purpose of the fund should be to encourage the conservation of historic heritage in the region or district. The fund should complement any regulation adopted in the regional or district plan.

Administration of the fund

13. The delegation for the administration of the fund should be stated in the fund policy. Normally, the funding decisions are delegated to a Council sub-committee or individual staff member. It is best practice for decisions to be informed by a specialist advisory group which includes professional expertise in historic heritage.

Funds available for distribution

14. The fund policy should outline the total amount of the fund allocated by Council on an annual basis and the maximum total of individual grants.
15. The maximum total of individual grants should have flexibility to provide a small number of large grants for substantial conservation (landmark) projects and a larger number of small grants for small-sized conservation projects.
16. Some funds may pay the full 100 percent costs of conservation works, others may limit the contribution to a percentage of the total cost (e.g. 50 percent). This percentage amount should be explicit in the fund policy.
17. Funds should be made available for emergency situations. These funds should be available, at short notice, to deal with situations such as emergency repairs following a storm or an unexpected discovery under construction works.

Type of fund

18. Normally, the type of fund will be a simple grant. Other types, however, such as loans should be considered.

Eligibility criteria

19. Since the purpose of most heritage fund schemes is to provide a 'carrot' to complement the 'stick' of regulation, the fund should be limited to owners of properties that are:
- ▶ Listed for protection in the regional and district plan.
 - ▶ Registered under the Historic Places Act 1993.
 - ▶ Recorded as archaeological sites as defined in the Historic Places Act 1993.
 - ▶ Subject to a protective covenant or heritage order.

20. The definition of 'owners' should be clarified to include owners who hold a long-term lease to the property under the Land Transfer Act 1952, tenure under the Crown Pastoral Land Act 1988 or other long term lease or concession. In these cases, eligibility should be decided upon a case-by-case basis considering:

- ▶ The nature and history of occupation and lease.
- ▶ Evidence of the commitment of the owner to occupy and maintain the property.
- ▶ Any relevant covenant over the property.

21. While the eligibility criteria should exclude Council-owned properties, it should allow Council to obtain funding assistance in special circumstances. It is often the case in situations of 'demolition by neglect' or 'orphaned buildings' that an owner may refuse to apply for funding or no record of ownership can be discovered. In these cases, Council may wish to apply for funding and carry out the conservation works without the owner's participation.

22. Other places, that are not protected under the RMA or Historic Places Act 1993, should be able to be considered for funding assistance as part of an 'exceptional circumstances' provision. For example, if a district plan only protects historic buildings, then other types of heritage, such as wahi tapu, will not be eligible for funding assistance.

23. The fund policy should provide clear guidance on the type of work that is eligible for funding assistance. This should be limited to work that has a positive conservation outcome. It will normally involve:

- ▶ Stabilisation, repair, maintenance and restoration to historic buildings and structures (e.g. earthquake strengthening, fire protection, roofing, repairs to masonry, joinery, plaster or glazing).
- ▶ Conservation work relating to land or archaeological sites (e.g. site stabilisation, repair, vegetation management, fencing).
- ▶ Conservation work relating to places and areas of significance to Maori (e.g. marae restoration, pou repair, urupa maintenance, landscaping).
- ▶ Professional services (e.g. research, condition reports, conservation plans, archaeological assessments, cultural values assessments, management plans, supervision of work).
- ▶ Interpretation and public education and information.

24. The fund policy should provide clear guidance on the types of work that are not eligible for application to the fund. This type of work will involve construction of new buildings, alterations and additions, reconstruction, relocation, demolition, insurance and debt repayments.

25. The fund policy should state that heritage conservation projects that have already been completed at the time of the fund application will not be eligible to apply to the fund. An exception, however, should be provided for so that situations such as urgent works can be considered on a case-by-case basis.

Application process

26. The fund policy should state how the public can apply for funding and include matters such as:

- Public advertisement of the fund and any funding deadlines.
- Application information requirements.
- The type of information to be included in the application form.
- Applicants may be asked to provide further information.
- Applicants must agree that the information in the application and information subsequently generated will be made available if required under the Official Information Act 1982.
- Applicants will be made aware of how Council will manage any private information with regard to the Privacy Act 1993.
- How many applications for the same property will be allowed each year.
- How unsuccessful applicants will be notified.

27. Further, the fund policy should state how funding will be granted. This will normally involve a decision by Council which is conditional on a written agreement between Council and the applicant which outlines the details of the grant and the associated conditions.

28. Funding should only be paid when the agreed work has been completed, inspected and approved.

Assessment of applications

29. The fund policy should outline the process by which Council will assess the applications. As stated above, the process should involve a technical advisory committee that includes professional heritage expertise. In some instances, the NZHPT is a member of technical advisory committees or local authority heritage grant schemes.

30. The fund policy should provide criteria that will guide Council's decision-making. The criteria should include matters relating to heritage significance, risk, urgency, conservation standards, public benefit and cost effectiveness.

Conditions of receipt of funding

31. All grants, and subsequent funding agreements, should include a number of standard conditions that include:

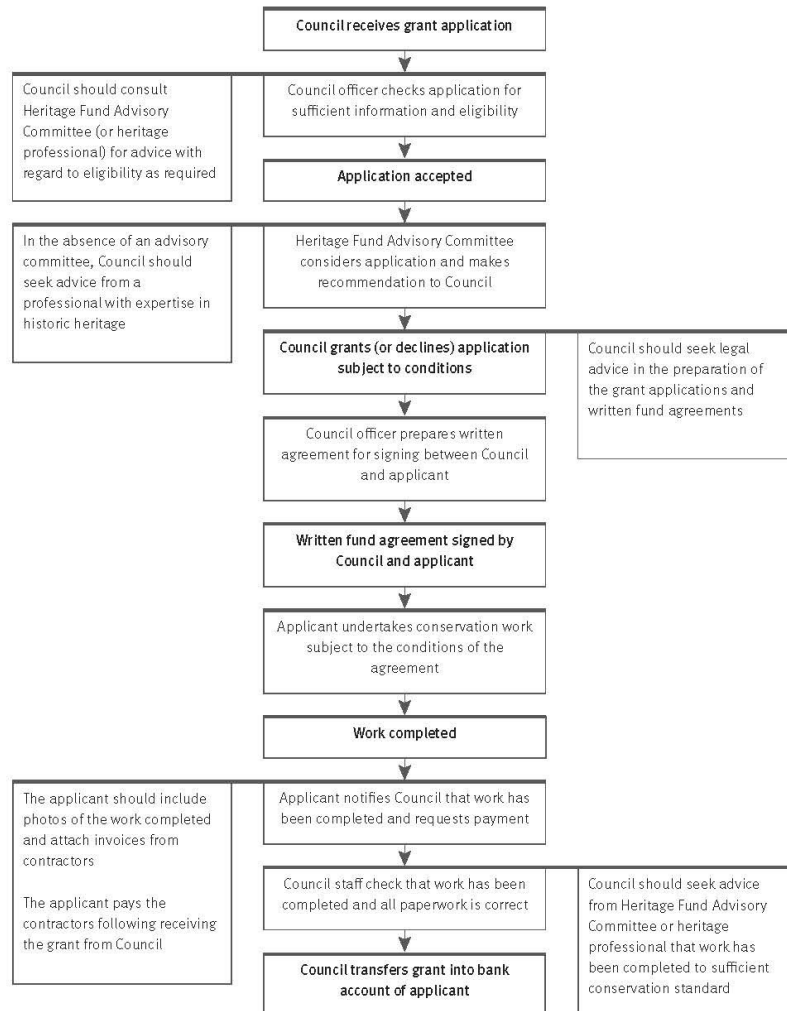
- That compliance with all applicable statutory requirements is the responsibility of the recipient.
- That payment of approved grant money is conditional on work being completed to satisfaction of Council and meeting best practice conservation standards (as assessed by a heritage conservation professional).

- The property must be available for inspection of the conservation work.
- That, wherever possible, acknowledgement of the funding given is provided by the erection of suitable signs and banners (supplied by Council).
- The conservation work should normally be commenced and completed within a stated period of time (e.g. commenced within 12 months and completed within two years of Council approving the grant).
- The recipient must agree to the public reporting of information such as: name of the recipient; name and address of the property and its heritage significance; funding allocation; and conservation work carried out.
- That the Council retain power at its discretion to require repayment if information in the application proves to be false or if conditions are breached.

Monitoring and reporting

32. The fund policy should state how Council will monitor all funded conservation work and reporting processes.

Recommended Process for Local Authority Heritage Grant Schemes



Appendix 2. Summary of district plan regulatory incentives (excluding consent fee waivers)

District Plan	Summary of incentive provisions for historic heritage	Section
Far North	Scale of activity (potential to increase to 100 percent). Subdivision, development bonus (form of conservation lot and possible consent cost waiver). Potential waiver of financial contribution.	12.5.6.2.1 12.5.6.3.1 14.6.3
Kaipara	Within the Subdivision Rules in the Zone Chapters, there is provision of increased development rights where protection of heritage resources is offered by an applicant as part of a subdivision process.	Part B: Land Use
Whangarei	Subdivision, environmental benefit.	73.3.2
Auckland Central Area	Heritage floor space bonus, existing use and activity incentive, exemption from consent fees, exemption from subdivision and financial contribution requirements if conservation plan has been prepared. Currently under review as part of preparation for unitary plan.	10.4.2 10.9.3 6.7.2.5 6.7.5.7
Auckland Isthmus	Transfer of development rights, existing use and activity incentive, exemption from consent fees, exemption from subdivision and financial contribution requirements if conservation plan has been prepared. Currently under review as part of preparation for unitary plan.	5C.4.2
Auckland Hauraki Gulf	Conservation lots. Currently under review as part of preparation for unitary plan.	7.4.3
North Shore	Potential to waive any development control of other non-heritage rule provision. Currently under review as part of preparation for unitary plan.	11.4.1.1
Franklin	Conservation lots, also note saying Council may consider relaxing other plan provisions. Currently under review as part of preparation for unitary plan.	22.11.4

District Plan	Summary of incentive provisions for historic heritage	Section
Proposed Hauraki	Relaxation or waiving parking requirements or bulk and location rules where this would encourage sustainable reuse and protection of heritage values.	
Proposed Waipa	Encourages the ongoing protection of Waipā's heritage items through the implementation of incentive rules relating to the reuse of such buildings. Policy 2.3.6.5 Makes provision for medical centres, offices, restaurants, cafés and other eating places, and childcare and pre-school facilities to occur within buildings listed in Appendix N1 (includes rules). The transportation zone also contains relaxation of parking, loading and access requirements.	Policy 2.2.3.6.2/2.3.6.5 plus rules
Matamata-Piako District Plan	Subdivision, conservation lots, waiver of car parking requirements.	6.1.3
Proposed South Waikato	Any otherwise non-complying subdivision in the Rural zone or Rural Residential zone, if as a result of the subdivision a significant natural area or a significant archaeological site is to be protected in perpetuity by covenant or other legal means to the satisfaction of Council. One additional protection lot is allowed under this provision per significant natural area or significant archaeological site that is being protected (conditions apply).	10.3
Thames-Coromandel	Subdivision, conservation lots.	7.5.2.3
Western Bay of Plenty (Operative 2012)	7.6.3 Building Act Flexibility Council may consider more creative solutions to building consent issues through section 47 of the Building Act.	7.6.3
Whakatane	Flexible zoning provisions, restoration.	4.1.14/ 4.1.8.4
Gisborne	Economic incentives section (parking dispensations, waiver of financial and reserve contributions).	3.11.2
Hastings	Subdivision, conservation lots, Plan Change 47	15.1.8.2
Marlborough Sounds	Subdivision, special purpose lots.	27.3.3.1.2

District Plan	Summary of incentive provisions for historic heritage	Section
Christchurch	The Christchurch Central Recovery Plan introduced substantial zone waiver provisions in July 2012 to facilitate the heritage recovery of the city. The rule (applying to the Central City) states that in respect of any activity on any site involving any heritage building, place or object, any activity in or upon the same site shall not be required to comply with any of the relevant standards specified below: a. Scale of activities and residential coherence (Living Zones); b. Retailing (Living Zones); c. The following car parking and cycle parking standards in Vol.3, Part 13 Central City Zones: 2.4.1 (a) Car parking space numbers; 2.4.1 (c) Car parking space numbers; 2.6.1 Car parking space numbers. d. The following standards in Vol.3, Part 3: 2.2.1 Building Setbacks and Continuity (Central City Business Zone); 3.4.5 Street Scene (Business 1 Zones within the Central City). e. The following standards in Vol.3, Part 3 or Part 11, for alterations to heritage buildings only: 2.2.6, 2.2.16 and 2.2.12 Verandas, Minimum Unit Size, Outdoor Living and Service spaces (Central City Business Zone, and 3.2 Business 1 Zones within the Central City); 1.3.4(h) Acoustic insulation (Central City Business and Business 1 Zones within the Central City); 3.6.2 Gross Leasable Floor Area (Business 1 Zones within the Central City)	
Kaikoura	Subdivision, allotment size flexibility.	13.12.11
Dunedin	Council may reduce or waive any control in the district plan if they are certain the proposal will restore, protect or maintain a heritage building.	

Appendix 5.

Summary of local authority rates relief for historic heritage

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Far North District	The Council may postpone or remit rates where an area is afforded permanent legal protection through a covenant or reserve status.
Whangarei District	Possible rates relief.
Rodney District	Remission on rates (100 percent), excluding water or sewerage rates.
Hamilton City	Possible rates relief.
Matamata-Piako District	Possible rates relief to owners of heritage buildings.
Otorohanga District	Council will give consideration to rates relief on covenanted sites of heritage value.
South Waikato District	Council will resolve, on a case-by-case basis, what amount of rates (excluding rates for refuse collection, sewage disposal and water supply), up to a maximum of 33 percent, qualify for a remission.
Taupo District	Will consider rates relief for landowners to help encourage voluntary protection or enhancement of sites.
Waikato District	A 100 percent remission of all rates may be applied to land protected for historic or cultural conservation purposes.
Waikomo District	Possible rates relief.
Opotiki District	Providing rates relief for voluntary protection of resources on private land where such protection is of benefit to the wider community and in keeping with Council policy.
Tauranga City	Possible rates relief to assist heritage management.

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Gisborne District	Partial rates relief for properties or the affected parts thereof, provided the heritage value of the item is maintained and, in respect of archaeological sites, suitable protection measures such as covenants are taken.
Central Hawkes Bay District	The extent of the rates remission if approved is to be 100 percent.
Hastings District	Land taken out of production and vested in a formal conservation covenant may be granted 100 percent remission of rates, with the exception of targeted rates for wastewater disposal, water supply and refuse collection.
Napier City	Rates remission for land subject to a heritage covenant under the Historic Places Act 1993 or any other covenant or agreement entered into by the owner of the land with a public body for the preservation of existing features of land, or of buildings, where the conditions of the covenant or agreement are registered against the title to the land and are binding on the subsequent owner of the land.
Wairoa District	Council will decide what amount of rates will be remitted on a case-by-case basis subject to a maximum of 50 percent of the rates owing.
Taranaki Regional	Remit all or part of the rates owed by the ratepayer in respect of rating units provided the conditions of the policy have been met.
South Taranaki District	Rates remission.
Stratford District	Will provide rates remission of up to 100 percent of the rates on land with a heritage structure on it to all ratepayers who meet the objectives, conditions and criteria of the policy.
Horowhenua District	Each application will be considered on its merits. If approved the value of the remission will be 100 percent in the case of Queen Elizabeth the Second National Trust covenants and 50 percent in other cases, of the general rates of that part of the rating unit covered by the application.
Manawatu District	100 percent of rates relief for listed Group A places and 50 percent for Category B places.

Resource Consent Heritage Fee Waivers (as at October 2012)

Council	Summary
Wellington City	Wellington City Council will reimburse resource consent fees to owners of listed heritage items or items in listed heritage areas. Private owners and charitable trusts, including church organisations, are eligible. A decision to grant resource consent fee reimbursement is at the discretion of the Council's Principal Heritage Advisor. Before granting reimbursement, heritage advisors may specify certain conditions. Applicants are required to agree in writing to these conditions and pay any reimbursed resource consent fees if the conditions are violated. The Council allocates \$50,000 each financial year to heritage resource consent fee reimbursement. A cap of \$2,500 is applied to each application.
Marlborough District	Possible waiving of resource consent application fees.
Nelson City	The Council introduced Zero Fees for non-notified resource consent applications to conserve and restore heritage buildings, places or objects. In the 2011/12 financial year resource consents to the value of \$2,500 were waived under this policy.
Selywn District	Historic Buildings, Places and Objects Fund: To help applicants meet the processing costs for resource consent applications related to the maintenance or restoration of cultural or historic buildings, and for projects involving the maintenance or restoration of cultural or historic sites or buildings. Maximum grant is \$2,000 (plus GST) available to those requiring some sort of consent due to their item being a listed heritage item in the district plan.
Timaru District	Possible waiving of resource consent application fees.
Mackenzie District	Process resource consent applications relating to historic buildings free of charge.
Central Otago District	Council recognises the public benefit in maintaining and enhancing heritage precincts by waiving application fees associated with resource consents for work within a heritage precinct that requires resource consent only because that activity is located within a heritage precinct.
Dunedin City	Council waives resource consent fees for minor works on heritage items listed in the district plan.

Appendix 4.

Summary of local authority heritage-related grants

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Far North District Council Community Fund		Heritage Assistance Fund replaced by general community fund from 1 July 2009).	Applications to fund projects which promote, maintain, improve, develop or undertake recreational and community amenities, facilities, programmes and services in the district, other than those normally considered in Council's annual or long-term planning process.
Kaipara District Council Heritage Assistance Fund	\$15,000	Up to \$10,000 but individual grants are capped at 50 percent of the total cost of a project.	Funds could be used to support the structural review of these buildings and the identification of suitable means of improvement. The work to be undertaken is essential and appropriate to ensure preservation of the heritage resource.
Former Auckland City, Manukau, North Shore, Rodney and Waitakere heritage funds	Various – combined total is about \$50,000	Various – most grants tend to be up to \$10,000.	The former Auckland City, Manukau, North Shore, Rodney and Waitakere councils developed grant funds for historic heritage. These funds are now managed by Auckland Council. Information about the funds is available from the Auckland Council website. ⁹⁵ There are also other sources of funding such as the local boards discretionary grants.
Auckland Council Built Heritage Protection Fund	\$10.3m		Established June 2011. \$10.3 million in 2011/2012. \$4.6 million per annum in following years. The primary role of this fund is to assist in purchase of heritage buildings at risk as a revolving initiative.

95 <http://www.aucklandcouncil.govt.nz/EN/newsandculture/communityfundingsupport/grantsfunding/environmentalheritage/Pages/home.aspx>

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Waikato District Council Heritage Assistance Fund	Funding available on a three-yearly cycle.	The next heritage funding round is late February 2014.	To assist with the conservation, restoration and protection of valued heritage items within the Waikato District Council boundaries that are not Council owned.
Environment Bay of Plenty Regional Council Environmental Enhancement Fund	Up to 300,000	A single application should not exceed 10 percent of the total available funding.	The fund's purpose is to assist regional organisations and community groups by providing financial and technical support for activities and projects whose primary purpose is to directly promote, enhance or protect: <ul style="list-style-type: none"> the natural or historic (including cultural) character of; public access to; and/or public understanding. More specifically, it focuses on projects that look at public access of, the public's understanding of, and the natural or historic character of the environment.
Napier City Council Art Deco Improvement Fund		Grants paid at a rate of \$25 per linear metre per floor and applies only to walls facing the street.	Eligible for buildings either in the Art Deco Heritage District or those commercial, industrial or community purposes buildings outside the CBD which are significant examples of art deco. Also for buildings listed with the NZHTP and buildings listed under the district plan. The fund does not apply to residential buildings.
Hastings District Façade Enhancement Scheme	\$16,000		The programme provides grant assistance to owners and tenants of heritage buildings in the CBD for the painting and enhancement of building façades of architectural and historical significance primarily within the CBD. However buildings along key traffic routes and within suburban commercial shopping areas can also be considered for a grant. The amount of grant is determined by the Urban Design & Parks Planner, and varies according to façade size, colour scheme costs and the profile and significance of the building.

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
New Plymouth District Council Heritage Protection Fund	The Council contributes \$25,000 per year towards its Heritage Protection Fund and unspent funds are carried over to successive years.	Provided the work in question meets the Council's criteria for consideration, the amount of funding will be dependent on the importance of its building, the necessity, the availability of funds and applicant's resources.	The Heritage Protection Fund was established by the Council to help private landowners manage, maintain and preserve the heritage values of their properties. It provides a partial contribution towards the cost of a specific heritage project or work. Applications can be made for any item identified in the heritage schedule of the district plan.
Wanganui City Building Assessment Assistance Fund	\$29,000	Assistance is given as a dollar for dollar grant to a maximum grant of \$1,500 for any one report.	The fund helps owner or purchaser to have preliminary expert reports done for a building so they know what is needed to comply with the Building Act. These reports may be Initial Evaluation (IEP's) Procedures for earthquake-prone buildings or cover fire safety and physical access. The Fund is not for detailed design or physical works but for assessing the condition of the building and scoping necessary works. Buildings in the Old Town Conservation Overlay Zone, the Central Commercial Zone and on (or potentially on) the District Plan Heritage list are eligible.
Manawatu District Council Heritage Improvements Fund			Fund was reduced from \$50,000 for 2009/10, noting that fund currently has a positive balance (combines heritage incentive grants fund, heritage incentive planning grants fund, and earthquake risk building fund).

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Wanganui City Building Assessment Assistance Fund	\$20,000	Assistance is given as a dollar for dollar grant to a maximum grant of \$1,500 for any one report.	The fund helps owner or purchaser to have preliminary expert reports done for a building so they know what is needed to comply with the Building Act. These reports may be Initial Evaluation (IEP's) Procedures for earthquake-prone buildings or cover fire safety and physical access. The Fund is not for detailed design or physical works but for assessing the condition of the building and scoping necessary works. Buildings in the Old Town Conservation Overlay Zone, the Central Commercial Zone and on (or potentially on) the District Plan Heritage list are eligible.
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Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Palmerston North Council Natural and Cultural Heritage Incentive Fund		Grants are 50 percent of the cost of approved works up to a maximum of: Commercial properties 10,000; Community properties (not subject to rates) 10,000; residential properties \$5,000; Conservation asset management plans \$5,000.	<p>The primary targets of the Incentive fund are:</p> <ul style="list-style-type: none"> ► Heritage conservation work. ► Heritage research, education and promotion initiatives. ► Earthquake-prone heritage buildings. ► Notable trees. <p>Available for:</p> <ul style="list-style-type: none"> ► Owners of listed buildings, sites, objects or trees. ► Rangitane iwi. ► Non-profit incorporated heritage groups/organisations. ► Specialist heritage places conservation/management bodies.
Taranaki District Council Heritage Protection Reserve	\$36,797	There is no specific amount for the size of any grant. A minimum of 50 percent of the project's total cost is required.	Applications can be made for any item identified in the Heritage Schedule of the District Plan including: historic buildings and places, historic churches, structures and monuments, archaeological sites and wahi tapu and registered historic areas. It may also apply to items that are not listed in the district plan if they meet the Heritage Advisory Group's criteria for significance.
Ruapehu District Council Heritage Grants Policy			An incentive for owners of heritage buildings listed in the District Plan Schedule of Heritage Buildings to maintain the buildings at a high standard. Note: to the NZHPT's knowledge, there have been no grants made under the policy and no specific money is set aside in the annual planning process.

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Hutt City Council Heritage Fund	\$130,000	Maximum not documented.	Any applications over \$15,000 will require a heritage report or advice from a suitably qualified heritage conservation professional. In all but exceptional circumstances, Hutt City Council will not pay more than 50 percent of the cost of conservation.
Kapiti Coast District Council Heritage Fund	\$27,000	Up to \$5,000.	<p>To be eligible the place must be: a registered heritage feature (registered in the Kapiti Coast District Plan Heritage Register, the New Zealand Archaeological Association Site Recording Scheme, or the Historic Places Trust Register); or any other heritage feature (including trees, buildings, wahi tapu or wahi taonga, heritage objects, or archaeological, historic or geological sites). However, the place must meet the General Criteria listed in this document; and b) have a heritage management plan.</p> <p>With respect to (a) above, the site does not have to be listed in the District Plan Heritage Register at the time the funding is applied for. It is sufficient to agree to registration in the Register.</p>
Masterton District Heritage Fund		Annual Rates Credit.	Each property with an item listed in Appendix F.4A and F.4B of the Masterton District Plan will be given an annual credit of \$50 to be used for work that enhances or maintains the heritage item. The credit will be held and recorded by the Council until such time as the owner requests the money for these works and the consent is granted.

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Palmerston North	Council will decide what amount of rates will be remitted on a case-by-case basis subject to a maximum amount of 33 percent of rates assessed for that rating unit per year.
Ruaapehu District	Maximum of \$500 to be granted for a residential heritage property listed in the district plan as discretionary rates relief. Maximum of \$2,000 to be granted for a non-residential property listed in the district plan as discretionary rates relief.
Wanganui District	Council will decide what amount of rates will be remitted on a case-by-case basis subject to a maximum amount of 33 percent of rates owing per year.
Hutt City	Council will decide what amount of rates will be remitted on a case-by-case basis subject to a maximum amount of 50 percent of rates owing per year.
South Wairarapa	Council will decide what amount of rates will be remitted on a case-by-case basis.
Upper Hutt City	Allows Council to remit or postpone rates under selected criteria.
Marlborough District	Possible rates remission.
Nelson City Council	Owners of heritage buildings listed as either Group A or Group B in the Nelson Resource Management Plan, who commit to maintaining their buildings, are eligible for the remission. Owners of buildings listed as Group A in the Nelson Resource Management Plan will be eligible for up to a 50 percent remission, and owners of buildings listed as Group B will be eligible for up to a 25 percent remission of their general rates based on land value. The remission does not include storm water, uniform annual general charges or waste water charges. Each application will be considered on its merits and provision of a remission in any three-year cycle does not set a precedent for similar remissions in future cycles. Rates remission will be made by passing a credit to the applicant's rates assessment.
Tasman District	Rates remission is available for owners of heritage buildings with a commitment to maintain their buildings in return.

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Selwyn District	Ratepayers who own rating units which have some feature or cultural, natural or historic heritage is voluntarily protected may qualify for remission of rates under this policy. Applications should be supported by documentary evidence of the protected status of the rating unit, for example, the copy of the covenant or other legal mechanism. In granting remissions under this policy, the Council may specify certain conditions before remission will be granted. Applicants will be required to agree in writing to these conditions and to pay any remitted rates if the conditions are violated.
Ashburton District	There is a process regarding rates remission through the Rating Department.
Kaikoura District	Rate remission will be made by passing a credit to the applicant's rates assessment.
Timaru District	Rates remission available.
Waimate District	Council will grant full remission of the general rate where application is made to Council and is satisfied that the owner of the land has voluntarily preserved or enhanced natural, historical or cultural features of the land. Council may also consider the extent to which public access to the land is provided by the landowner and commercial gain is derived by them. This remission will be funded from within the general rate urban, or general rate rural as appropriate.
Central Otago District	Council will decide what amount of rates is to be remitted on a case-by-case basis, subject to a maximum of 30 percent of rates assessed in a year.
Clutha District	Council will consider up to 100 percent of general rates.

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Dunedin City	<p>Available to non-profit organisations that serve the social, educational, recreational, cultural or environmental well-being of the community. Owners of heritage buildings undertaking major restorative works may be eligible for rates relief. Heritage rates relief aims to reward imaginative and/or productive reuse of heritage or townscape buildings. Rates relief is allocated from a contestable fund and the following considerations will guide decisions on who receives relief and the amount given:</p> <ul style="list-style-type: none"> • The level of investment (there is a typical investment threshold of \$100,000). • The significance of the building. • The type of building use. • The location of the building. <p>Dunedin also has a Targeted Rate Scheme for Earthquake Strengthening of Heritage Buildings. This allows building owners to obtain funding for earthquake strengthening of heritage buildings and pay this back through a targeted rate on their property. Eligible building owners may obtain amounts of up to \$50,000 to assist with earthquake strengthening. Larger amounts may be considered on a one-off basis. Additional assistance may also be available through the Dunedin Heritage Fund.</p> <p>In addition, Dunedin City Council has established a heritage residential B&B rates category in June 2011. This is available for owners of heritage B&B who were paying commercial rates following assessments by Quotable Value in 2010.</p>
Queenstown Lakes District	The extent of any rates remission will be determined on a case-by-case basis.
Environment Southland	Council officers will be delegated authority to remit 100 percent of rates on those portions of land which qualify.
Invercargill City	Council will decide what amount of rates will be remitted on a case-by-case basis.
Southland District	Council will grant a 50 percent remission of general rates. Where only part of a rating is affected, a separate ratesable assessment will be required to be established for the area involved.

Appendix 6.

Summary of other types of incentives provided by local authorities

Other type of local authority incentives, as at October 2012

Council	Summary
Waitomo District	Possible assistance towards professional advice/information or the preparation of a conservation plan.
Gisborne District	Annual plan provisions for: i) two hours of free advice from a heritage consultant for items scheduled in the Post European Contact Schedule in respect of conservation or maintenance, restoration of original architectural elements and shopfronts, adaptive reuse and colour schemes; ii) two hours of free advice from an archaeologist or other suitably qualified person for items scheduled in the archaeological site or waahi tapu schedule regarding the preparation of a conservation or management plan; iii) heritage paint fund available to owners of heritage buildings on the Central Business District Schedule; and iv) a fencing fund to facilitate the protection of significant archaeological sites.
Central Hawkes Bay District	Funding is available for the identification of historic sites that arise from any subdivision or resource consent applications.
Hastings District	Subject to funding being available the Council will assist landowners to enhance the heritage nature of the building by the use of grants to upgrade and paint the facades of buildings above veranda height.
New Plymouth District	Up to two hours of Council paid architectural advice and up to one hour of Council paid colour scheme advice by the Council's advisors is available for buildings listed in the Council's Heritage Inventory, to promote design and colour compatible with the heritage values of the building.
Horowhenua District	Possible offer of low-interest loans in the protection of heritage features.
Manawatu District	There are low-interest loans for people who for some reason are ineligible for funding grants or rates remission.
Kāpiti District	Financial contributions for fencing and a range of other protective measures.

Other type of local authority incentives, as at October 2012

Council	Summary
Hutt City	Council to subsidise on a case-by-case basis basic consultant fees for conservation advice for heritage buildings. Council offers to provide free advice to owners of heritage buildings on how to conserve heritage buildings in accordance with Council policies and other statutory requirements.
Masterton District	Fencing fund to protect significant archaeological sites. Applications will be considered according to: the level of threat and potential damage that could result if the site remained unfenced; and the significance of the archaeological site based on its uniqueness, representative nature, condition and importance to tangata whenua, the community and landowner.
Porirua City	Possible low interest loans, free information and assistance.
Nelson City	Heritage awards are being investigated.
Christchurch City	Council continues to offer heritage advice at no charge to the building owner, recognising the importance of this as an incentive for heritage protection.
Otago Regional	To provide for parking demand in the Business Resource Area through the provision of public car parking development except for on-site requirements associated with large traffic-generating activities. On-site requirements for parking may be relaxed where this will result in retention of a heritage item that would otherwise be lost.

Other type of local authority incentives, as at October 2012

Council	Summary
Dunedin City	Awards for individuals or groups in recognition of restoration or protection of heritage items; Free advice on architecture and design to owners of heritage items; Repainting initiative: buildings identified as having heritage value with the Heritage Precinct are eligible for a financial contribution upon repainting. Initiatives are only granted where the repainting is in accordance with the principles outlined in the Council's Renovation and Colour Guidelines. The contribution is calculated at \$20 per lineal metre of building viewed from the street for every storey of the building. A contribution of \$10 per lineal metre of verandah paint is also available. The Council may award greater contributions for the repainting of heritage buildings with unique characteristics such as ornate decoration. Free advice to help in planning heritage improvements. Promote pre-application meetings to discuss options when undertaking work on a heritage building. Can bring together a heritage project team consisting of a Building Control Officer, Resource Consent Planner, and Heritage Planner to work with applicants during the consent process. Awards for individuals or groups in recognition of restoration or protection of heritage items. There are now awards for earthquake strengthening, heritage interior restoration, and re-use of a heritage building. Each receives a certificate, plaque and \$1,500 prize. These are awarded at the Dunedin Heritage Re-use Awards in March annually. \$70,000 in the Warehouse Precinct Heritage Area for heritage reuse assistance in 2012/2013 only.
Invercargill City	In order to promote quality development and redevelopment in the city centre the Council awards Civic Plaques to projects including those contained within the City Centre Heritage Precinct that comply with the guidelines and contribute to the vibrancy of the city.

Appendix 7. Summary of Auckland City Central Area District Plan, heritage floor space bonuses granted and recipient sites (as at May 2009)

CITY PLANNING

HERITAGE FLOORSPACE BONUS REGISTER

SUMMARY OF HERITAGE FLOORSPACE BONUSES GRANTED

Site Address Where Bonus Granted		Building Description	Heritage Floor Space Bonus Granted	
Site No	Street Name		Transitional Floor (sq m)	Combined 2004 Plan (sq m)
30-32	Arndale Street	Two Terraced Houses		853
2-8	Chancery Street	Chancery Chambers		9,040
36-38	Customs Street East	Australia House	8,365	
40-42	Customs Street East	A H Nathan Building	8,355	
12-32	Customs Street West	Former Customs House		16,000
8-11	Durham Lane	Bluestone Store		3,936
3	Eaton Crescent	Eaton Hall		3,996
19a	Princes Street	Former Synagogue	1,850	
19	Princes Street	Northern Club		5,877
12	Queen Street	Former Chief PO	31,883	
209-215	Queen Street	Civic Theatre		5079
301-303	Queen Street	Tower Hotel	41,484	
187-189	Queen Street	APR Bldg	11,436	
118-124	Queen Street	Vulcan Bldg	4,256	
138-146	Queen Street	Effraon Chambers		294
2	Symonds Street	St Andrew Church	5,295	
28	Symonds Street	St Pauls Church	10,095	
96-79	Warreny Street	St Matthews in the City	28,225	
		Total HPS Bonus Granted	100,031	417,927

CITY PLANNING

HERITAGE FLOORSPACE BONUS REGISTER

SUMMARY OF RECIPIENT SITES

Site Address Where Bonus Granted	Bonus M ² Floorspace Received or Retained	Bonus M ² Floorspace Transferred Onward
76-84 Albert Street	2,928	87
92-95 Albert Street (191 Queen Street)	1,110	
9-11 Commerce Street	454	
84 Cook Street	87	
23 Customs Street East	194	
73-83 Customs Street West	25,000	
15-25 Durham Street West (171 Queen Street)	2,127	2,123
150-152 Fanshawe Street	1,447	
65 Fort Street	6,147	3,965
12 High Street	23,273	
10-18 Hudson Street	518	
49 Hobson Street	820	
6-10 Kitchener Street	3,500	
2-18 Princes Street	3,580	
132-138 Quay Street	2,800	
188-194 Quay Street	3,215	
45 Queen Street	967	
151 Queen Street	1,941	
80 Queen Street	3,692	
21 Queen Street	1,596	

28-32	Shortland Street	0	12,296
42	Shortland Street	8,404	
37	Turner Street	2,123	
11	Union Street	319	
167	Victoria Street West	3,958	
150-170	Victoria Street West	1,087	
56-57	Waverfield Street	4,354	
		199,087	18,481

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