

# HERITAGE INCENTIVES SCHEME OPERATING GUIDELINES

*Adopted by Council 14 April 2020 Updated Jan 2024*

**PARENT DOCUMENT:** [Heritage Strategy and Action Plan 2020–2035](#) [Built Heritage Management Policy](#)

## PURPOSE

Adelaide's built heritage makes a significant contribution to the city's identity and its liveability. ~~There are 647 state heritage and 1850 local heritage places within the city boundaries.~~ The Heritage Incentives Scheme (HIS) provides financial and other incentives to support owners in the conservation of their heritage places. Grants are available for both professional documentation and building conservation works. Works funded through the Heritage Incentives Scheme visually enhance the public realm and develop community understanding about the importance of heritage conservation.

~~The Heritage Incentives Scheme also funds the services of Council's heritage architects in providing free conservation guidance to property owners and managers. The Heritage Incentives Scheme Operating Guideline sets out the administrative processes and responsibilities for the implementation of the Scheme.~~

## OPERATION

### Eligibility

Funding is available to:

- ~~Local Heritage Places listed in the Adelaide (City) Development Plan.~~
- ~~State Heritage Places on the South Australian (SA) Heritage Register.~~
- ~~places listed by Donovan and Associates, History and Historic Preservation consultants in their report City of Adelaide Heritage Survey 2008 – 2009, as meeting heritage criteria in the Development Act.~~
- ~~unlisted heritage places that were objector properties in the North Adelaide Plan Amendment Report (2003).~~

~~other unlisted buildings of significant historical character based on their merits.~~ Funding is available to [Places within the City of Adelaide Local Government Area that are:](#)

- [Local Heritage Places](#)
- [State Heritage Places listed on the South Australian Heritage Register](#)
- [Other unlisted buildings of significant historic character based on their merits.](#)

Funding is provided for **conservation works** ~~Conservation Works~~ that are in accordance with the Australia ICOMOS\* Burra Charter, 2013 (Burra Charter) and associated with heritage fabric including:

- elements of the heritage place designated as of heritage value ~~in the Adelaide (City) Development Plan or the SA Heritage Register~~ or work that ensures the structural integrity of the place.
- reinstatement of lost elements or fabric of the place where there is physical or archival evidence, such as historical photos or drawings, or remnant elements. Conjectural works will not generally be supported except where no evidence exists, and a heritage consultant is engaged to achieve an authentic and appropriate outcome agreed with Council heritage staff.

\*The *International Council on Monuments and Sites (ICOMOS)* is a non-governmental international organisation dedicated to the conservation of the world's monuments and sites. The national committee is known as Australia ICOMOS and is the peak cultural heritage conservation body in Australia.

Funding will not be provided to projects that:

- do not meet the eligibility criteria.
- do not sufficiently describe the scope of works or are not accompanied by adequate quotes.
- are lacking professional advice or documentation which has been requested by City of Adelaide heritage staff.
- are owned by Government.
- are from individual owners within a strata or community title property.
- are for general building maintenance-that is not dependent on heritage status, such as repainting or termite treatment.
- are for internal works (unless the interior is listed as of heritage value).
- are for works unrelated to heritage values, such as landscaping, paving, additions, outbuildings, re-plumbing, re-wiring, or installation of security devices.
- are for the cost of an owner's labour.
- project costs are covered by other State, Local or Federal governments or philanthropic funding.

Funding may be allocated to an unlisted heritage place of historic character, providing the owner enters into a Land Management Agreement (LMA) on the Certificate of Title to ensure:

- the building is not demolished.
- support for future Development Plan policy changes to enable heritage listing-support for future heritage listing.
- conservation works reinforce the heritage value of the place.:-

The cost of a heritage assessment and LMA is fully funded through the HIS.

Funding may also be allocated for the construction of appropriately researched and detailed ~~front boundary fences~~**Front Boundary Fences**, (where the fence is not part of the heritage listing). ~~Funding of up to \$10,000 or up to 50% of the construction cost, whichever is the lesser amount, may be allocated.~~

Funding may also be allocated for fees associated with **Professional Advice and Documentation**:

- advice, plans, and specifications which guide the future management of and investment in heritage places, and including:
  - conservation plans
  - adaptive reuse options-studies
  - adaptive reuse options-studies

- studies relating to joint heritage/sustainability outcomes
- photographic, archaeological or dilapidation surveys
- fire safety and disabled access upgrade plans.
- documents for development approval, tendering, implementing, and supervising conservation works.

In addition, the applicant must meet the following:

- the property is owned by the non-government sector.
- there are no debts or outstanding charges to Council on the property.
- the works have not been substantially commenced or completed prior to funding approval. Retrospective funding is not available.
- the cost of the conservation works is greater than \$34,000.
- for properties in multiple ownership, each owner has agreed to undertake conservation works and the applicant is the body corporate of the strata or community title holders.
- other affected parties (e.g. lessees, lessors, owners) have agreed to undertake the conservation works at the property.
- any encumbrances have been identified.

For works resulting from an insurance claim, grants are for conservation works not covered by the insurance.

Current Council employees or former employees who ceased employment less than six months before applying and who are owners of heritage places are eligible to applying apply for HIS funding.

Having Applicants that have received funding from other grants does are not precluded applicants from receiving funding from HIS.

Applicants are eligible for funding more than once per year for professional advice and conversation works.

## **Categories of Funding**

### **1. Professional Advice and Documentation**

~~Funding of up to \$10,000 or up to 75% of the total documentation and professional fees, whichever is the lesser amount for:~~

- ~~● advice, plans, and specifications which guide the future management of and investment in heritage places.~~
- ~~● documents for development approval, tendering, implementing, and supervising conservation works.~~

~~Funding may also be allocated for:~~

- ~~● conservation plans~~
- ~~● reuse options studies~~
- ~~● photographic, archaeological or dilapidation surveys~~
- ~~fire safety and disabled access upgrade plans.~~

Funding of a percentage of the total cost of Professional Advice and Documentation, up to the maximum grant (whichever is lesser) as defined in the following table:

| <u>Category</u>   | <u>Cost of Professional Advice and Documentation</u> | <u>Percentage of cost reimbursed</u> | <u>Maximum Grant</u> |
|---|--|--------------------------------------|----------------------|
| <u>No funding available</u>   | <u>Up to \$3,000</u>                                 | <u>0%</u>                            | <u>\$0</u>           |
| <u>Professional Advice and Documentation</u><br><u>(Delegated Decision)</u> | <u>Greater than \$3,000</u>                          | <u>Up to 75%</u>                     | <u>\$15,000</u>      |

**2a. Conservation Works:**

~~Minor conservation works – projects up to \$50,000:~~

- ~~• a grant of up to \$25,000 or up to 50% of the project cost, whichever is the lesser amount.~~

~~Major Conservation Works – projects over \$50,000:~~

- ~~• Projects between \$50,000 and \$200,000: a grant of up to \$100,000 or up to 50% of the project cost, whichever is the lesser amount. The maximum grant is \$100,000.~~
- ~~• Projects over \$200,000: a grant of up to 25% of the project cost. The maximum grant is \$250,000.~~

Funding of a percentage of the total cost of conservation works, up to the maximum grant (whichever is lesser) as defined in the following table:

| <u>Category</u>   | <u>Cost of Conservation Works</u>                 | <u>Percentage of cost of works reimbursed</u>   | <u>Maximum Grant</u>   |
|---|---|---|------------------------|
| <u>No funding available</u>   | <u>Up to \$3,000</u>                              | <u>0%</u>   | <u>\$0</u>             |
| <u>Minor Conservation Works</u><br><u>(Delegated Decision)</u>              | <u>Greater than \$3,000 and up to \$150,000</u>   | <u>Up to 50%</u>  | <u>Up to \$75,000</u>  |
| <u>Major Conservation Works</u><br><u>(Council Decision)</u>                | <u>Greater than \$150,000 and up to \$300,000</u> | <u>Up to 50%</u>  | <u>Up to \$150,000</u> |
| <u>Major Conservation Works over \$300,000</u><br><u>(Council Decision)</u> | <u>Greater than \$300,000</u>                     | <u>Up to 50% of \$300,000</u><br><br><u>Plus:</u><br><u>Up to 25% of amounts over \$300,000</u> | <u>Up to \$375,000</u> |

**2b. Conservation Works – Front Boundary Fences:**

Funding of a percentage of the total cost of constructing appropriately researched and detailed front boundary fences, (where the fence is not part of the heritage listing) up to the maximum grant (whichever is lesser) as defined in the following table:

| <b><u>Category</u></b>                            | <b><u>Cost of Conservation Works</u></b> | <b><u>Percentage of cost of works reimbursed</u></b> | <b><u>Maximum Grant</u></b> |
|---|--|--|-----------------------------|
| <u>No funding available</u>                       | <u>Up to \$3,000</u>                     | <u>0%</u>  | <u>\$0</u>                  |
| <u>Front boundary fence (Delegation Decision)</u> | <u>Greater than \$3,000</u>              | <u>Up to 50%</u>                                     | <u>\$10,000</u>             |

**3. Staged Conservation Works**

Where a building owner requests funds for major conservation works, Council may consider a grant allocation over multiple financial years. The project would be subject to an agreed scope of works that satisfies the general funding requirements of these Operating Guidelines. The first stage should be commenced within 12 months, with other stages undertaken in accordance with the agreement.

**Fees**

~~Development application fees for HIS conservation works requiring Development Approval will be waived. Note there are mandatory State Government charges to lodge a Development Application which are payable by the applicant.~~

For state heritage places, there are mandatory fees for referral to Heritage South Australia which are payable by the applicant.

Development application fees normally charged by City of Adelaide are administratively waived and/or may be paid from the HIS.

Any licence and permit fees incurred by the owner during the construction period of HIS funded conservation projects (e.g. building works permit fees) may be paid from the HIS.

**Loans**

In addition to direct funding, subsidised loans may also be available. A subsidised loan is additional to the HIS funding limits and will be within the budget (and at no additional cost) to the Built Heritage Management Program. Loans will be approved at the discretion of Council.

**Process**

### Step 1 - Preliminary Discussions

Before lodging a HIS application, owners must contact Council heritage staff to discuss:

- the scope of works, priorities and options
- the eligibility of the project
- documentation requirements
- the application process.

### Step 2 – Lodging an Application

HIS applications are lodged online through the City of Adelaide website.

Applications for **professional advice and documentation** [Professional Advice and Documentation](#) should include:

- the scope of works
- written quotes (two are preferred).

Professional advice and documentation should be from a suitably qualified heritage professional.

Professional documentation is a requirement for conservation works over \$10,000 unless exempted by Council.

Applications for **conservation works** [Conservation Works](#) should include:

- a site plan or aerial photo identifying the location of the proposed works on the property.
- construction techniques (e.g. Council's standard specifications and advisory notes).
- details of materials and conservation methodology.
- plans, elevations, sections and where appropriate, large scale details.
- where applicable, professional advice and documentation funded through the HIS.
- a minimum of two written quotes unless an exemption has been agreed to by council.

Applications that are incomplete or inaccurate, will not be processed.

Development Approval must be obtained before allocation of the HIS grant.

### Step 3 - Application Assessment

All grants are at the discretion of Council. Applications are assessed according to the Operating Guidelines. Assessment is based on the condition of the building, the merit of the project and is assessed against the following criteria:

| Principle                               | Criteria  | Rank     |
|---|---|----------|
| Needs of the place                      | <ul style="list-style-type: none"> <li>Condition of the building</li> <li>Conservation of original heritage fabric</li> <li>Stability of the building</li> <li>Emergency works</li> <li>Useability and economic viability of the place</li> </ul>   | High     |
| Visual Contribution to the public realm | <ul style="list-style-type: none"> <li>Conservation works on elements which are visible from the public realm or to places which are publicly accessible</li> </ul>   | High     |
| Heritage value of the place             | <ul style="list-style-type: none"> <li><del>Heritage listing status— State, Local, Local (City Significance) or Local (Townscape)</del></li> <li>Retaining, reinforcing and reinstating elements of heritage significance of the place</li> <li><del>Projects that conserve the elements of heritage value of a place as identified in the Adelaide (City) Development Plan or in the State Heritage Register</del></li> <li><del>Projects that conserve the elements of heritage value of a place as identified in the heritage listing</del></li> <li><del>Projects where conservation works are incorporated into adaptive reuse outcomes</del></li> <li><del>Projects where conservation works are incorporated into sustainability outcomes</del></li> </ul> | High     |
| State Heritage Places                   | <ul style="list-style-type: none"> <li>Availability of grants from the State Government</li> </ul>  | Medium   |
| Level of Past HIS financial assistance  | <ul style="list-style-type: none"> <li>Properties that have not previously received HIS funding.</li> </ul>   | Medium   |
|   | <ul style="list-style-type: none"> <li>Funding history of the property.</li> </ul>  | On Merit |

#### Step 4 - Funding Allocation

Subject to availability of funds, applications will be accepted on an on-going basis.

~~Funding is up to 50%. Funding is up to 50% for Conservation Works and up to 75% for Professional Advice and Documentation.~~ The allocated amount is at the discretion of council. Unless Council considers that there are extenuating circumstances, the allocated amount will not be increased after the allocation approval date.

For more complex conservation projects, Council may allow for a contingency sum in the grant allocation for unforeseen cost or scope increases.

Funding is valid for 12 months from the date of the allocation letter. Excepting for major conservation works, staged conservation works or where an extended completion date has been agreed to by Council, funding will be forfeited if the project is not substantially completed within 12 months.

If an applicant wishes to substantially alter the scope of works or project costs, a new HIS application will be required.

### Step 5 - Implementation

Following the funding allocation, the applicant is required to:

- comply with the conditions of the funding allocation and Development Approval.
- notify Council heritage staff when the works are about to commence and at key milestones in the construction process as agreed with heritage staff.
- notify Council at the completion of the works and before final payment to the contractor.
- provide a post-completion inspection report when it is required by Council.

### Step 6 - Allocation Reimbursement

Prior to reimbursement for:

- **Professional Advice and Documentation:**
  - The applicant must provide copies of the funded professional advice and documentation to Council heritage staff. Council will advise if the work is acceptable for Council's grant purposes.
  - The applicant must provide evidence of payment to the consultant.
- **Conservation Works:**
  - Council heritage staff will inspect the completed conservation works and advise if the work has been satisfactorily completed for HIS grant purposes.
  - The applicant must provide evidence of payment to the contractor/s.

Once satisfied that ~~the all~~ the HIS grant requirements have been met, Council heritage staff will arrange reimbursement to the applicant.

City of Adelaide reserves the right to withdraw funding if a project does not proceed as agreed.

### **Decision making**

Approval for funding of Conservation Works noted as Council Decision in the Categories of Funding section of this document requires a decision of Council. Council will allocate funds at their discretion.

City of Adelaide staff have authority to approve the allocation of funding of grants for Professional Advice and Documentation and Conservation works noted as Delegated Decision in the Categories of Funding section of this document in accordance with Financial Delegation limits

### **Administrative Roles and Responsibilities**

~~The Planning, Design and Development Program has overall responsibility for the implementation and monitoring of these Operating Guidelines as well as processing applications for Development Approval. Specific roles and responsibilities include:~~



**Advisor** – Council will support the management and conservation of heritage places through the provision of advice through the Heritage Advisory Service and the HIS.

**Information Provider** – Council will foster community awareness and appreciation of the City's built heritage through promotion and education.

**Advocate** – Council will advocate to:

- other tiers of Government for funding to support heritage conservation.
- property owners to invest in their heritage assets.

The Chief Executive Officer (CEO) has authority to approve the allocation of funding of grants up to and including \$50,000 for conservation works.

Approval for funding over \$50,000 requires a report to Committee/Council.

The Planning, Design & Development Program will provide Council with recommendations for project funding. Council will allocate funds at their discretion.

### **Restrictions and Limitations**

HIS funding will not be provided to projects that:

- do not meet the eligibility criteria.
- do not sufficiently describe the scope of works or are not accompanied by adequate quotes.
- are lacking professional advice or documentation which has been requested by Council heritage staff.
- are owned by the Australian Government, State or Local Government.
- are from individual owners within a strata or community title property.
- are for general building maintenance that is not dependent on heritage status, such as repainting or termite treatment.
- are for internal works (unless the interior is listed as of heritage value).
- are for works unrelated to heritage values, such as landscaping, paving, additions, outbuildings, re-plumbing, re-wiring or installation of security devices.
- are for the cost of an owner's labour.

Council reserves the right to withdraw funding if a project does not proceed as agreed.

### **KEY PERFORMANCE INDICATORS**

Key performance indicators are:

- ~~80 percent of approved projects completed (\*Note: there may be some time lag in measurement e.g. not all approved projects will commence in the same financial year as funding allocation)~~
- ~~customer satisfaction level of 7 or above (survey of applicants that have received funding)~~
- ~~all commenced projects are completed to an adequate quality~~
- ~~administration of the scheme occurs in accordance with the Operating Guidelines.~~

## OTHER USEFUL DOCUMENTS

### Related documents

- The Burra Charter: The Australia ICOMOS Charter for Places of Cultural Significance, 2013
- The City of Adelaide Heritage Strategy and Action Plan 2020 - 2035
- The City of Adelaide Heritage Technical Notes
- Technical Conservation Notes, South Australian Department of Environment and Water
- City of Adelaide Strategic Plan [2020-2024](#) - [2024-2028](#)

### Relevant legislation

- *Development Act 1993*
- *Heritage Places Act 1993*
- ~~Adelaide (City) Development Plan~~
- Building Code of Australia
- *Planning, Development and Infrastructure Act 2016 (SA) (PDI Act)*
- ~~Draft~~ Planning and Design Code

## GLOSSARY

Throughout this document, the below terms have been used and are defined as:

**Conservation** as defined in The Burra Charter and for the purposes of these guidelines includes preservation, restoration, reconstruction and stabilisation.

~~Conservation works~~ **Conservation Works** are building works that directly contribute to the heritage values of a heritage place by restoring, conserving, enhancing or reinstating historic fabric or features (including removal of cladding/screening devices on existing facades or non-original elements concealing historic fabric).

~~Development is as defined in the Development Act 1993.~~ **Development** is as defined in the *Planning, Development and Infrastructure Act 2016*.

~~State Heritage Place~~ **State Heritage Place** is a place which is listed under the ~~SA~~ *Heritage Places Act 1993* as it satisfies one or more of the criteria for listing under Section 16 of the Act. These place are identified in and statutorily protected from inappropriate development through the ~~Adelaide (City) Development Plan~~ *Planning and Design Code*.

~~Local Heritage Place is a place which is listed in Council's Development Plan and satisfies one or more of the criteria for listing under Section 23 of the Development Act 1993. These places are identified in and statutorily protected from inappropriate development through the Adelaide (City) Development Plan.~~ **Local Heritage Place** is a place which is listed in the *South Australian Heritage Register*. These places are identified in and statutorily protected from inappropriate development through the *Planning and Design Code*.

~~Unlisted Heritage Building~~ **Unlisted Heritage Building** is a place which is not ~~listed in Council's Development Plan~~ *identified in the South Australian Heritage Register*, but satisfies one or more of the criteria for local heritage listing and has been endorsed by Council (following detailed assessment by heritage advisors) for consideration for listing as part of the:

- Central Business Area/Mixed Use Zones City Heritage DPA [2010]
- Residential/Mainstreet (Hutt) Zones City Heritage DPA (Parts 1 &2) [2010]
- North Adelaide Plan Amendment Report (PAR) [2003]

- other places listed by Donovan and Associates History and Historic Preservation Consultants in their report City of Adelaide Heritage Survey 2008-2009, dated April 2009, as meeting criteria in the Development Act, 1993.

~~Character Building is a place which is of a traditional style and materials and considered to contribute to the historical context of a streetscape but does not satisfy the criteria for local heritage listing.~~ Historic Character is a place which retains the physical form, style and features of an historic period but does not satisfy the criteria for Local Heritage listing.

**ADMINISTRATIVE** As part of Council’s commitment to deliver the City of Adelaide Strategic Plan, services to the community and the provision of transparent information, all policy documents are reviewed as per legislative requirements or when there is no such provision a risk assessment approach is taken to guide the review timeframe.

This Policy document will be reviewed every **five-3 (three)** years unless legislative or operational change occurs beforehand. The next review is required in **20212027**.

**Review history:**

| Trim Reference                 | Authorising Body                             | Date/<br>Decision ID | Description of Edits  |
|--------------------------------|--|----------------------|---|
| ACC2016/181572                 | Associate Director<br>People &<br>Governance | 15/09/2016           | Amendment to Guidelines to include the conservation of front fences, to increase the proportion of professional advice and documentation costs covered by HIS from 50% to 75%, and to increase internal delegation to \$50,000.   |
| ACC2020/96728                  | Director, Place                              | 14/04/2020           | Amendment to Guidelines to allow for staged funding, strengthen the requirement for two quotes, require the applicant to notify CoA at the completion of the works <u>and</u> prior to payment of the contractor and allocate less than 50% funding in certain circumstances.                       |
| <a href="#">ACC2021/199494</a> | <a href="#">Chief Executive Officer</a>      |                      | <a href="#">Updates to guideline to reflect legislative changes to the planning system through repeal of the Development Act 1993 and replacement with the Planning, Development and Infrastructure Act 2016. Updates to definitions and allocation amounts for Major and Minor Works, specific</a> |

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|--|--|--|--|
|  |  |  | <a href="#"><i>inclusion of eligibility for sustainability and adaptive reuse studies.</i></a> |
|--|--|--|--|

**Contact:**

For further information contact the [Planning, Design and Development Program](#)  
[Park Lands, Policy and Sustainability Program](#)

City of Adelaide

25 Pirie Street, Adelaide, SA

GPO Box 2252 ADELAIDE SA 5001

+61 8 8203 7185

[h.mailcity@cityofadelaide.com.au](mailto:city@cityofadelaide.com.au)