



Waitaki
DISTRICT COUNCIL
TE KAUNIHERA Ā ROHE O WAITAKI

Waitaki Heritage Fund Policy

Adopted by Council on 5 October 2021

Revised and adopted by Council 24 September 2024

Waitaki Heritage Fund Policy

(September 2024)

Waitaki's historic heritage (as defined in the Resource Management Act (RMA)) is diverse and significant – Māori heritage, historic buildings and structures, archaeological sites, historic sites, coastal sites, and historic areas. Protecting historic heritage from inappropriate subdivision, use and development is a matter of national importance under s6(f) of the RMA.

The care of heritage places can involve extra cost and/or expertise, so Waitaki District Council has three ways to support owners to look after their heritage places:

- the Waitaki Heritage Fund,
- the Heritage Consent Fee Waiver, and
- access to advice from Waitaki District Council's heritage advisor, and through the heritage advisor, access to advice from a conservation architect.

Waitaki Heritage Fund

Purpose

The purpose of the Waitaki Heritage Fund is to provide grants to encourage heritage to be conserved. Loans may be considered on a case-by-case basis.

Eligibility

Owners of the following types of heritage places are eligible to apply for funds:

- Buildings/structures/sites listed as 'historic places' on the New Zealand Heritage List/Rārangī Kōrero ('The List') and/or scheduled as contributing buildings/heritage buildings/structures/sites in the Heritage Appendix of the Waitaki District Plan.
- Places listed as Wāhi Tūpuna, Wāhi Tapu or Wāhi Tapu areas on The List.
- Contributing buildings/structures in a Historic Area in The List and/or within a Heritage Precinct of the Waitaki District Plan.
- Places likely to meet the criteria for being included on The List or the Waitaki District Plan's heritage appendix. If funding is to be considered for an unlisted building, the heritage value of the place must be demonstrated with sufficient research and analysis for a district plan listing. It will be a condition of the grant that the place will be listed.

From time to time the committee may prioritise particular types of applications. For example, conservation and preservation of sites that are earthquake prone or applications from building owners in Ōamaru's town centre.

The grants are for works that enhance the historic character of heritage buildings or sites. Generally, preference will be given to (in no particular order):

- Restoring or reconstructing missing original features (such as parapets).
 - Applicants should provide evidence to support reconstruction.
- Painting in a heritage colour palette of a previously unsympathetically painted structure.

- Original colour schemes are preferred. These can be established by paint scrapings confirmed with photographic evidence where possible. Otherwise, colours should be selected from the following approved heritage colour charts:
 - Aalto Heritage Collection (see: <https://www.aaltopaint.co.nz/shop/colours/heritage-collection>)
 - [Resene Heritage paint colour chart](#), see also Resene Heritage Colour Palette (2006); or Resene Whites and Neutrals (2001)
 - British Standard BS 5252:1976 A01 to C40, see [Resene BS5252 colour range chart | British Standard 5252](#)
- Paint removal where the paint is inappropriate or damaging to a structure.
 - Where paint removal is from a timber structure, this should not use heat to remove paint. Circular sanders are likely to leave marks and should also not be used on any heritage fabric.
- Essential repairs, stabilization, or core structural works (eg repairs and maintenance, for example, reroofing, damp proofing, gutter replacement).
 - Repairs and maintenance should use matching materials and profiles to the original.
- Upgrades to code/regulation standards to enable contemporary use of heritage places, e.g. fire, earthquake, access provisions.
 - Upgrades should follow best practice guidelines such as those published by Heritage New Zealand Pouhere Taonga (HNZPT) and be able to demonstrate that these guidelines have been followed.
- Specific “like with like” material replacement/maintenance projects that protect the integrity of heritage buildings.
 - (eg slate or timber shingle roofing; copper gutters/downpipes; wooden joinery; stained glass; stonework; pressed tin ceilings; etc).
- Preparing of heritage conservation plans or condition reports.
 - Conservation plans should follow best practice guidelines such as the J S Kerr *Conservation Plans: A Guide to the Preparation of Conservation Plans for Places of European Cultural Significance*, Australia International Council on Monuments and Sites (ICOMOS), 2013, and they should be prepared by a person with relevant training and experience, or peer reviewed by such a person.
- Emergency works to protect heritage fabric.
- Earthquake strengthening works.
 - Strengthening should follow national best practice such as HNZPT guidelines and use engineers with appropriate experience in the strengthening of heritage buildings.
- Retrospective works will be considered at the discretion of the committee.

To ensure the work is done according to good conservation standards, there will be an agreement on the scope of the works, confirmation of the works through signed plans, and site visits at the beginning and end of the project.

Projects that are not eligible for funding include:

- Works that do not enhance or preserve heritage value.
- Additions and extensions to heritage buildings.
- New signage.
- Works on Council or Crown-owned properties.
- Full or partial demolition of a heritage building; and
- New buildings within heritage areas/heritage precincts.

Funding

For projects that cost less than \$15,000 (excluding GST) funding may be applied for up to a maximum of **60%** of the total cost of works.

For projects that cost \$15,000 (excluding GST) or more, funding may be applied for up to a maximum of **50%** of the total cost of the works.

Please note that the GST element of project costs is not eligible for heritage funding and applicants are advised to seek other means of covering this cost prior to applying to the fund.

At present Waitaki District Council's (WDC) practice has been to check the potential grant/loan recipient's GST status – if they are registered for GST, Council will pay the grant amount (from the Waitaki Heritage Fund) plus 15% (for the GST). If the potential recipient is **not** GST-registered, Council will only pay the grant amount (from the Waitaki Heritage Fund), without any GST.

Application rounds

Each year, it is expected that the Heritage Fund will have \$100,000 added. There will be two funding rounds per year and any unallocated funds will be kept in the fund for the following year. Decisions will be issued in the month after the close of each round. All applicants will be notified in writing of the Committee's decision.

Funding will be conditional on any applicable Building or Resource Consents being obtained.

Emergency applications may be made at any time.

An accountability report is required from a successful applicant no later than 12 months after the loan/grant has been uplifted, and for every (period of up to) 12 months the project continues after that i.e. if your project last 15 months, you will need to provide a report for the first 12 months within 12 months, and another report for the last 3 months of the project.

The works must be completed within two years of receiving the application. An extension can be sought in extenuating circumstances and substantial progress will need to be demonstrated.

Funds are paid when the grant is approved, or the required building or resource consents are obtained. Receipt of contractors' invoices should be presented as evidence of the work being completed.

Applying to the fund

Applications are to be made on the application form. Applications should include two quotes from appropriately qualified people/organisations indicating the costs of, and specifications for, the works for which funding is requested.

Once an applicant has been awarded a grant/loan or other benefit by the Waitaki Heritage Fund, that applicant will be ineligible for a grant/loan or other benefit from the Waitaki Heritage Fund for a period of two years – except in the case of an emergency.

How the applications are assessed

The Grants and Funding Officer, logs, and acknowledges the application.

The Council's Heritage Advisor assesses the application, and may seek advice from HNZPT and a conservation architect as required. The Heritage Advisor may request more information from the applicant to make sure the application is complete. A site visit is likely to be required.

The Heritage Advisor then writes a report to the Grants and Awards Committee and the/Director Natural & Built Environment/Director Strategy, Performance and Design. The committee decides whether or not to grant the application, and the amount of the grant.

Applicants may attend the fund meeting to speak to their application if they wish to. Committee members may choose to make a site visit to view the place for which funding is sought.

The Grants and Funding Officer advises the applicants on the result of the fund meeting.

When **assessing** an application, the committee considers (in no particular order):

- whether, if a site is of significance to Māori, the project has support from the appropriate runaka.
- the heritage value of the building/site (including whether it is on the Waitaki District Plan/Proposed Waitaki District Plan and/or The List).
- the degree to which the proposed works are consistent with the conservation principles and practice of the ICOMOS (NZ) Charter and other relevant international ICOMOS Charters.
- the risk of the heritage value diminishing if funding is not granted.
- confidence in the quality of the proposed work.
- confidence that the project costs are as accurate as possible.
- whether the building owner has sufficient resources, or has access to funding, and could proceed with the project without additional financial assistance.
- whether the project has received funds from other public grants.
- whether the project is visible and/or accessible to the public; and
- whether the project will provide a benefit to the community.

For **conservation projects** we prioritise:

- urgent works or works that ensure the long-term survival of a building/site.
- the completing or updating of a conservation plan/condition report.

For **seismic strengthening** projects we prioritise:

- buildings on the MBIE's [Earthquake-prone building list](#).
- buildings approaching the expiry date of their s124 (dangerous building) Notice under the Building Act 2004.
- projects which strengthen more than one attached building.
- buildings which have not as yet commenced assessment or detailed design works.
- heritage buildings within heritage precincts.

When **allocating** funding we consider:

- the value of the funding request.
- the value of the funding request when considered against the total project cost.
- parity with similar projects in previous rounds.
- equitable distribution in the current round.
- the amount of funding available for allocation.
- the ownership and level of public access to the relevant site.

The following are guidelines only.

NB The Committee have sole discretion over determinations of the applicant's legal status and the level of public access to their site for the purposes of administering this Fund.

When the owner of the building/site is:	Consider funding up to a maximum of only:
Public (but not government) – e.g. a community group, registered charity or incorporated society.	50% of projects costing \$15,000 or more 60% of projects costing less than \$15,000
Privately owned but the location is 100% available to the public/for public purposes	45% of projects costing \$15,000 or more 50% of projects costing less than \$15,000
Privately owned but somewhat available to the public (e.g. a shop)	35% of projects costing \$15,000 or more 40% of projects costing less than \$15,000
Privately owned with minimal or no public access or use (e.g. a private residence)	30% of projects costing \$15,000 or more 30% of projects costing less than \$15,000
When the building/site is listed as a Category A, B or character contributing within the (as of 1/8/2024) draft District Plan's Ōamaru Historic Area. This area is an overlay within the Waitaki District Council's draft District Plan.	50% of projects costing \$15,000 or more 60% of projects costing less than \$15,000
NB. This goes for all such buildings/sites that qualify, even those buildings/sites determined to be entirely privately owned and inaccessible to the public.	

Monitoring the use of funds

Once funding is approved, a contract is prepared and signed between Waitaki District Council and the owner of the heritage property specifying the conservation work to be funded and the applicable conditions. Conditions may include the establishment of a heritage covenant under the Heritage New Zealand Pouhere Taonga Act, or other guarantees that the property will be protected from damage, demolition or destruction. Other conditions will include owner compliance with all statutory requirements, availability of the property for inspection of the conservation work, agreed completion dates, and public reporting and acknowledgement of the funding of the projects.

Glossary - Definitions (in relation to heritage places)

Additions means the construction of new fabric that increases the external volume of a listed heritage place and which has the effect of altering the heritage form, fabric or heritage values of the place.

Alterations means the modification or replacement of the internal or external fabric of a listed heritage place which has the effect of altering the heritage forms, fabric, and heritage values of the place. (See also 'maintenance').

Conservation means the processes of caring for a place to safeguard its cultural heritage value.

Demolition means the destruction in whole or in part of a heritage place which results in the complete or significant loss of the heritage forms, fabric and heritage values of the place.

Heritage Place means any buildings and sites of significant heritage value that are listed in the heritage appendix of Waitaki District Plan or the Heritage New Zealand List/Rarangi Korero, or that are assessed as significant enough to be listed in the future.

Heritage Fabric means any physical element, feature, material, or finish which is part of the heritage value in whole or in part of a building or place, and includes any original heritage fabric. Subsequent changes to such physical elements, features, materials or finishes which contribute to the record of the historic development of the heritage place are also considered to be part of the heritage fabric. This also includes the aggregate effect of material weathering and wear due to use over time.

Heritage Values means those tangible and intangible values of a heritage place which relate to or are derived from its historical, social, cultural, spiritual, aesthetic, architectural, technological, craftsmanship, environmental, archaeological, or contextual significance or its significance in terms of its location as a landmark or as part of a group.

Maintenance means the protective care of a place and significant features of its setting.

Original Heritage fabric means any physical element, feature, material, or finish which was an integral part of the original heritage item.

Owners: Owners include those 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.

Relocation means the removal and re-siting of any building from any site to a new site, including removal and re-siting within the same site.

Setting means a defined area around a heritage place which itself is not specifically listed but which is an area identified to protect the context of a heritage place from effects that could detract from or reduce the heritage values of that heritage place, including view shafts of that heritage place from a public place or from within the setting. Setting includes trees, gardens, buildings, and structures that provide context for the heritage place.

Emergency means, in the context of a heritage place, that the property is liable to damage or may be lost if the work is not done.