

# Government Owned Heritage Fund



## Operating Guidelines

### Introduction

The South Australian government acknowledges the important contribution heritage places make to our social fabric and community and the need for their conservation.

The Government Owned Heritage Fund (GOHF) supports the conservation of state-owned State Heritage Places, through the provision of professional and financial assistance. These places are some of the most significant in South Australia and play an important role within communities and cultural landscapes.

The SA Heritage Grants Fund exists for those state heritage places in private ownership.

### Objectives

The principal objectives of the GOHF are to:

- Provide for and promote the conservation of state heritage listed places in a strategic manner consistent with high standards within government and industry.
- Encourage partnerships within government.
- Provide a financial incentive to conserve state heritage places.
- Maximise conservation works that enhance the public realm.

The priorities of programmed conservation projects are reviewed regularly to also take into account occupant needs, economic considerations, and government policy and priorities.

The program is administered by the Department for Environment and Water (DEW), Heritage South Australia.

### Legal Obligations

The *SA Heritage Places Act 1993* recognises the importance of South Australia's heritage places and provides, *inter alia*, for their conservation. Under this Act, the SA government has an

## Commentary

**Place** is defined in the Heritage Places Act 1993 as meaning, *inter alia*, a) any site or area, with or without improvements; b) any land; c) any building, structure or other work, whether temporary or permanent or moveable or immovable (including an item or thing that is permanently fixed or moored).

Places such as jetties, lighthouses, bridges and mine shafts may therefore be considered in the GOHF.

obligation to care for and protect the heritage significance of the state heritage listed places it owns and manages. Section 36 (3) states an offence is committed if a person

- (a) Fails to take reasonable care of a State Heritage Place; or
- (b) Fails to comply with any prescribed requirement concerning -
  - (i) the protection of a State Heritage Place; or
  - (ii) the state of repair of a State Heritage Place.

All development carried out under the Program, including that performed as a matter of urgency, must be approved in accordance with the *Development Act 1993*.

## Eligibility

The criteria for undertaking conservation work on State Heritage Places have been established by Heritage South Australia and endorsed by the Minister. The following essential requirements must be met:

- The place must be entered in the *South Australian Heritage Register*.
- The place must be either
  - 1) under *SA government ownership* and currently being *occupied/used*, or intended to be occupied/used by a SA government agency; or
  - 2) occupied or otherwise cared for by an incorporated body under a formal agreement with the SA government; or,
  - 3) in the absence of an occupancy or use, it can be demonstrated by way of a professionally prepared business case that the conservation works are in the best long-term interest of the place.

## Projects Eligible for Funding

Funding is for undertaking physical conservation works, including repair work, or for collecting and analysing information as a precursor to conservation actions necessary to:

- Conserve culturally significant *fabric*, including reconstruction based on irrefutable evidence.
- Reinforce the heritage value of the building or structure.

**Development** in relation to a state heritage place is defined in the Development Act 1993 as “the demolition, removal, conversion, alteration or painting of, or addition to, the place, or any other work that could materially affect the heritage value of the place”. The definition also includes building work, a change in use, and the division of an allotment.

The **State Heritage Register** is maintained by the SA Heritage Council and is available for public inspection. The heritage status of a place may be determined online (Heritage Places Database Search), or by Heritage SA at the DEW: telephone (08) 8124 4960, email dewheritage@sa.gov.au.

Inconsistencies in **SA government ownership** exist, e.g. buildings on Crown land leased to a non-government body which is responsible for their control, care and management. Such inconsistencies are considered on a case-by-case basis.

To safeguard the cultural significance a place should have a compatible use, i.e. one which respects the heritage value. This may not necessarily entail **occupation**, and consideration is therefore given to the **use** of non-habitable places. The GOHF may encourage a compatible use where one does not exist.

**Repair work**, involves processes such as restoration (removing accretions or re-assembling existing fabric) or reconstruction (introducing new fabric).

**Fabric** is defined as all physical material of the place including

- Ensure the structural integrity of a building or structure.
- Plan for the conservation of a place, e.g. conservation management plans.
- Facilitate adaptive reuse where new use supports conservation of its cultural significance and fabric.

elements, fixtures, contents and objects. It also includes building interiors, sub-surface remains and excavated material. Conservation is based on a respect for the fabric, and is an integral part of good heritage management.

## Projects Ineligible for Funding

Funding will not be made available for the following:

- Works that have commenced or been completed.
- Maintenance (activities necessary for continuous protective care, e.g. gutter cleaning and painting).
- Compliance upgrades required under legislation or codes for on-going use.
- Purchase of abutting land, buildings or objects.
- Relocation of buildings, structures or fabric.
- New buildings, additions and renovations.
- New monuments, signage and interpretation.
- Pest control measures.
- Purchase of equipment.
- Works to remedy the effect of actions or inactions that have knowingly been allowed to cause fabric deterioration.
- Emergency works, except under exceptional circumstances.

Examples of **actions** or **inactions** which knowingly cause fabric deterioration include obviously incorrect plumbing or stormwater disposal, failure to prevent water ingress, using fragile roofs as trafficable areas and ignoring termite and borer activity.

## Financial Commitment

It is a general requirement that GOHF funding be at least matched by the agency responsible for the place. To this end, the agency must provide an equal or greater financial contribution for essential conservation works. The value of in kind contributions and cost recovery (full or in part) for such things as administration, in-house project management, overheads and transport are not to be included in any agency contribution.

This requirement may be waived where it can be shown that the responsible agency or incorporated body cannot fund a matching contribution. Such waiver shall be predicated on the history of the responsible agency or incorporated body, and the manner in which it has cared for the place.

Funding can be used to cover costs associated with professional services (including management), approvals, licences and permits integral to the project.

Funding is typically allocated for a twelve month period commencing each financial year. Large projects are encouraged and should be staged to permit funding from consecutive funding cycles over two or more years.

## Invoicing and Payment

Costs attributable to specific projects are processed by DEW and are applied against the GOHF or invoiced to the client respectively. In particular circumstances where fund allocations are assigned as a contribution to projects undertaken within DEW, funds will be provided upon satisfactory achievement, as determined by DEW Heritage South Australia at pre-determined milestones. The timing is contingent upon project value and risk.

These processes are subject to revision and change as structures and processes within government change.

## Project Requirements

The project must comply with the GOHF operating guidelines and be undertaken in accordance with all legislated requirements.

Conservation work shall be to a high standard in a manner conforming to the *Burra Charter*.

The project should utilise all relevant knowledge, skills and disciplines. Competent professional direction and supervision must be maintained at all stages. In particular the services of a suitably qualified professional with expertise and experience appropriate to the nature of the work are essential. In most instances this shall be a Heritage Architect, who will play a leading role in the planning, documentation and construction phases.

The project must be delivered in a cost-effective manner to the highest level of probity and SA government mandated procurement requirements.

## Selection Criteria

Applications for funding are evaluated against the following criteria while having strong regard to the *cultural significance* of the place and the Burra Charter.

- Significance of the place.
- Level of significance reflected in extant fabric.
- Dilapidation of significant fabric.

This requirement may be waived where it can be shown that the responsible agency or incorporated body cannot fund a matching contribution. Such waiver shall be predicated on the history of the responsible agency or incorporated body, and the manner in which it has cared for the place.

The Australia International Council on Monuments and Sites (ICOMOS) Charter for the Conservation of Places of Cultural Significance, otherwise known as the **Burra Charter**, is a set of principles that have been adopted to create a nationally accepted standard for heritage conservation practice in Australia. Current version adopted 2013.

A place may have relative degrees of **cultural significance**. This may require different conservation actions, which will bear upon the assessment.

- Cause(s) of dilapidation of significant fabric.
- Retaining or recovering cultural significance.
- Structural stability posing a conjoint threat to safety and heritage value.
- On-going use and maintenance of the place.
- Visual contribution to the public realm, public access, and community benefit. Extent of agency financial contribution and funding history.
- Alignment with Heritage Asset Surveys or other strategic plans.
- Contribution to SA government priorities such as facilitating adaptive reuse and heritage tourism.

Projects are generally prioritised over three levels:

#### Level 1

Urgent conservation or Government priority works.

#### Level 2

Less urgent but none-the-less important works to be undertaken within two years.

#### Level 3

Actions to be undertaken within five years.

### **Process**

In order to ensure high quality service delivery and reinforce the financial assistance being provided, the key steps required of the applicant are:

#### 1. Concept

Confirm in principle eligibility:

- The place – ownership, heritage status, tenure.
- Proposed work.

#### 2. Scope

Establish priorities, scope and budget.

- Accept in writing GOHF Operating Guidelines.
- Formalise critical requirements, time frames and other parameters.
- Formulate brief.
- Obtain written confirmation of acceptance.

#### 3. Procurement

- Initiate procurement actions.
- Give notice for inspections and assessments.
- Provide requisite invoicing documentation in a timely manner.

Collaboration with DEW Heritage South Australia, should occur throughout the process. Professional assistance from DEW Heritage South Australia is available subject to resource constraints.