works

heritage
solutions

Incentives for Heritage Protection Handbook

A national guide for Local Government and the Community

Supporting Local Government Project

The Heritage Chairs and Officials of Australia and New Zealand

Cover images (left to right):

WA Case Studies

Victoria's partnership with Conservation Volunteers Australia provides training in a range of traditional skills. Here CVA volunteers are learning dry stone walling.

Tasmania: Heritage Solutions

Contents

1. Introduction and purpose of handbook

This handbook provides advice for local government on establishing incentive programs to assist people owning, living in, using, managing, developing and changing heritage places. Many incentive programs rely on state and Commonwealth funding. This guide provides information for local governments on seeking out such opportunities and implementing them.

This document is a national publication: the Commonwealth and individual state/territory governments have provided specific advice on programs available to support local government provision of incentives for communities.

The Environment Protection and Heritage Council National Incentives Taskforce report Making Heritage Happen (2004) examined incentives offered in Australia and internationally to promote historic heritage conservation. Following that research, this guideline is intended to provide simple advice for local governments interested in establishing local incentives programs.

2. What are incentives for heritage places

Local governments can provide assistance to help conserve local cultural heritage places.

Types of incentives include direct financial assistance and loans, technical assistance through the provision of free expert heritage advice, education and training, market based trading schemes, public/private partnerships and legal instruments such as heritage agreements. Partnerships with State government are often necessary to effectively resource local government heritage management.

Incentive programs should be part of a local government heritage strategy which provides the necessary framework for successful local government heritage management. This includes statutory protection of significant local heritage places and adequate development controls to ensure their ongoing protection.

There are a number of key characteristics of successful local government heritage management. At a minimum, a combination of some statutory tools and proactive incentives should be employed.   A summary of successful approaches or the key attributes of successful local government heritage managers is attached at Appendix A. In addition, there are many mechanisms utilised at the local level of government in relation to biodiversity conservation which may be adapted/expanded to include cultural heritage conservation goals.

3.   Local government incentive provision

In 2006 the Productivity Commission report into the Conservation of Australia's Historic Heritage Places (Productivity Commission Inquiry Report, 2006) reported that half of local governments surveyed provided some form of assistance to property owners for historic heritage conservation.
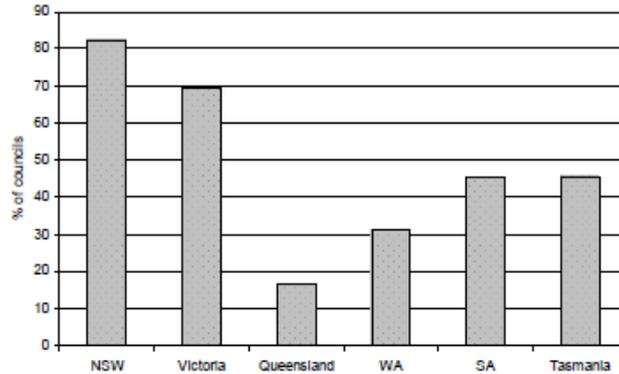
Figure 1 Assistance provided to owners of historic heritage places

Source: Productivity Commission 2006, Conservation of Australia's Historic Heritage Places, Figure B.2:331
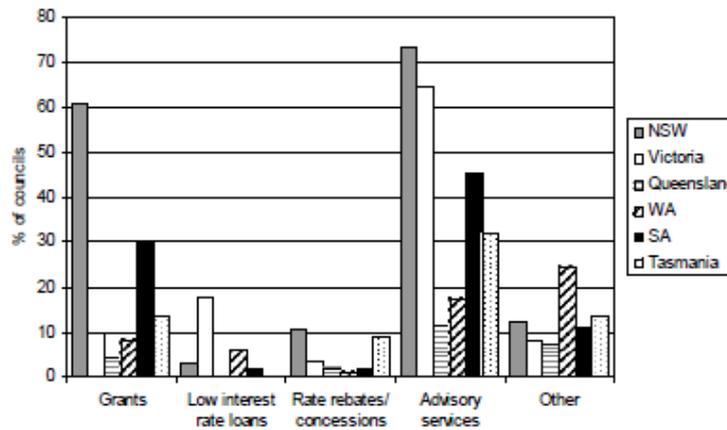
Figure 2 Type of assistance provided to owners of historic heritage places, by State

Source: Productivity Commission 2006, Conservation of Australia's Historic Heritage Places, Figure B.4:332)

The assistance provided was largely in the form of free heritage advice (2006:330).   In Victoria, 84% of local governments responding to the Productivity Commission's 2005 survey reported employing a heritage advisor. In New South Wales (NSW) 82% of local governments employed a heritage advisor (2006:335). In South Australia (SA), Western Australia (WA) and Tasmania the figures were 44%, 31% and 32% respectively (2006:335).

Table 1: Employment of heritage advisors – Proportion of responding councils				
State	Councils which employ a heritage advisor	Proportion of heritage advisors employed on a part-time basis	Average days per month [a]	Access to a heritage advisor employed by another council
	%	%	No.	%
NSW	81.5	85.0	2.1	1.5
Vic	83.9	96.2	2.7	1.6
Qld	9.3	77.8	2.9	4.1
WA	31.4	92.6	3.2	11.6
SA	43.8	92.9	1.9	6.3
Tas	31.8	85.7	5.0	0.0

[a] For part-time heritage advisors.

Source: Productivity Commission 2005, Conservation of Australia's Historic Heritage Places, Table B.10:335.

The survey also showed that a quarter of responding local governments provided grants for conservation works (2006:330).

The Productivity Commission survey found that the type of assistance provided to local government varied significantly between the states (2006:332). Grants were the most common form of assistance used in NSW and SA. Low interest rate loans were more typically used in Victoria. Rate rebates and concessions were offered by a few local governments. In NSW a reduced valuation for rating purposes was offered by the Valuer-General for heritage properties (2006: 333).
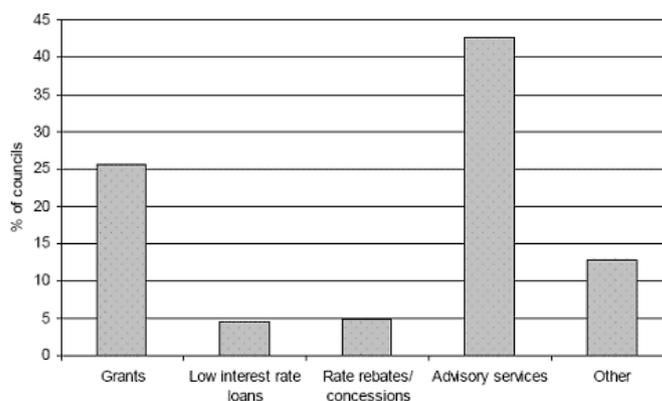

Figure 3: Type of assistance provided - proportion of responding councils

Other forms of assistance provided by local government to owners included:

- Assistance with state government heritage grant applications;
- Running grants on owners behalf
- Variation to development standards to assist in retaining buildings as part of any development/redevelopment of the site

- Possible consideration of density bonuses to assist conservation of heritage buildings
- Heritage floorspace scheme which allows owners to sell unrealised development potential of a heritage site to other developers
- Waiving of council development application fees
- Discount heritage paint scheme
- Video available to assist people to understand what heritage is about
- Heritage concession waiving the need for a development application for restoration works and reinstatement of missing detail
- Colour schemes and construction principles for historic heritage places
- Heritage awards held every year to encourage and promote conservation of historic heritage places
- Fast tracking procedure for minor heritage applications
- Free heritage information kit; free heritage trails; free heritage planning of appropriate places
- Free brochures with advice for garages, carports, fences, house extensions.

(Productivity Commission 2006:334)

The Productivity Commission's survey results included data on obtaining development control approval. The report noted that a number of local governments indicated that development applications on listed places were often negotiated between the owner and council prior to lodgement to achieve an acceptable solution and reduce later objections and contention (2006: 337). It was reported that on average in 2004-5 a small proportion of development applications for historic heritage places were rejected. In all states, more than half of local governments responding to the survey noted that no development applications had been rejected on heritage grounds (2006: 338).

4.   Purpose of heritage incentives

Incentives of any type are generally required because, without them, a desired outcome is unlikely to occur. Ideally, incentives should be considered as temporary measures until the community, popular perception and common practice makes their need unnecessary. In the heritage protection context, incentives are usually directed at individuals or organisations who are reluctant to support heritage or who assume that heritage protection imposes costs or creates barriers that do not normally apply to other property owners. This of course is not always the case. Nevertheless, incentives can often achieve improved or enhanced heritage outcomes.

The goal of providing incentives is to assist and stimulate the community in managing and conserving places of cultural heritage significance.

Incentive programs have assisted the community to develop and maintain a positive attitude towards heritage through the provision of free advice, financial assistance and other incentives.

Local governments have various opportunities to influence outcomes for heritage places and promote heritage conservation within the local area.

The provision of heritage advisory services is one of the most popular and successful heritage incentives adopted by local government. The Heritage Advisory Services Handbook, a national guide for Government, Advisors and Community - http://www.heritage.vic.gov.au//Forms-Guidelines/HCOANZ-handbook.aspx - provides specific advice for local government on establishing heritage advisory services.

5. Benefits of providing incentive programs

Some of the benefits for local government include:

- Improved community attitudes, understanding and acceptance of planning and heritage controls, policy and decisions
- Increased conservation of heritage places in the local area
- Improved streetscapes, main streets and public buildings through the maintenance, repair and use of important buildings
- Revitalised local communities, including economic and social benefits for the area
- Enabled individuals and communities through heritage volunteer schemes
- Enhanced community identity, including greater acknowledgement of cultural diversity within the community
- Environmental benefits through reduced resources required to demolish and rebuild
- Development of tourism opportunities
- Attraction of people and investment through enhanced amenity of local areas
- Economic benefits generated through heritage grant schemes (The SKM report *Heritage Grants Review (*2006) assessed five Victorian heritage grant schemes in operation since 2004 and found that every dollar contributed by the State government to heritage projects generated another 2.4 dollars in total economic benefits to the immediate community)

(SKM, *Heritage Review,* 2006; EPHC, *Making Heritage Happen,* 2004)

6. Conservation philosophy and approach

The aim of heritage incentives is to help conserve heritage places. Conservation of a heritage place involves all of the processes for looking after a place and may include such actions as adapting a place to a new use, undertaking maintenance works or restoring or reconstructing a feature of a building.

The *Australia ICOMOS Burra Charter,* 1999 (The Burra Charter) - http://www.icomos.org/australia/burra.html - is the widely accepted reference document for heritage conservation standards, philosophy and methodology in Australia. The principles enshrined in The Burra Charter underpin Australia's local, state/territory and national heritage management systems and legislative frameworks. Local planning policies and decisions should be consistent with The Burra Charter principles.

7. Types of local heritage incentives mechanisms

There are different types of direct and indirect heritage incentives mechanisms which local government may implement.

The following list includes some of the incentives commonly used across Australia.

- grants and loans
- planning incentives and other planning instruments
- heritage agreements
- revolving funds and conservation trusts
- encouraging use of heritage properties
- heritage advisory services
- publishing directories on resources, such as conservation suppliers and services and heritage consultants
- educational publications
- training and educational forums/workshops
- labour and volunteers
- recognition and promotion
- client and community relationships
- private/public partnerships and leasing of public heritage places
- rate rebates or remissions
- government to government assistance
- heritage tourism – http://www.heritage.wa.gov.au/heritage-tourism.html
- tax incentives
- property tax abatements
- income tax rebates or credits
- tax deductions and other misc tax benefits

The 2004 Environment Protection and Heritage Council report, *Making Heritage Happen* - http://www.environment.gov.au/heritage/publications/strategy/pubs/heritage-policy-tools.pdf - includes national examples of many of these types of incentive schemes.

8.   Grants and funding programs

Grants and other funding programs are the most well known and commonly accessed form of incentive. A comprehensive Commonwealth website – GrantLINK – lists current Australian, state and local government grants and funding programs available for individuals, businesses and communities - http://www.grantslink.gov.au/

Local governments and communities should consider a wider field than specific 'heritage' grants.   Heritage projects can potentially meet the criteria for grants relating to arts, museums and collections, community building, indigenous heritage, tourism, disaster/drought recovery and assistance, development of community infrastructure, library and archives, history, urban design, social planning, urban design, culture and environmental conservation.

9.   Commonwealth Government assistance schemes

(It should be noted that Commonwealth assistance schemes often change depending on budgetary circumstances).

The major sources of funding administered by the Commonwealth government are:

- Competitive programs under which eligible parties can apply for funding
- Discretionary, ad hoc or non-competitive grants approved by the Minister.

Specific heritage funding programs administered by the Department of Environment, Water, Heritage and the Arts include:

Indigenous Heritage Program 2009 - 1010 - http://www.environment.gov.au/heritage/programs/ihp/index.html - supports projects that identify conserve and interpret the indigenous heritage values of places important to Aboriginal and Torres Strait Islander people. Local governments are eligible to apply.

Visit the website of the Department of Environment, Water, Heritage and the Arts for latest information on funding programs - http://www.environment.gov.au/heritage/programs/index.html

10. State and Territory local government heritage assistance schemes

This section provides information about funding, heritage tools, advice and training offered by state and territory governments.

10.1   New South Wales

The Heritage Branch, Department of Planning, NSW supports local government through funding, leadership in policy and provision of tools, project partnerships, advice and training. Visit the website for the latest advice on funding and incentive programs offered - http://www.heritage.nsw.gov.au/

Funding

Funding for local government through the NSW Heritage Grants program - http://www.heritage.nsw.gov.au/02_subnav_01.htm - includes:

- Dollar for dollar grants up to $15,000 per annum for heritage planning studies.
- Dollar for dollar grants up to $7000 per year for four years towards a heritage advisor. After four years, the grant assistance for this program is $1 for every $2 of local government input.
- Dollar for dollar grants up to $8,500 for a local heritage fund.
- Grants up to $4,700 a year to subsidise the operation of a regional heritage network to facilitate local government heritage management.

The NSW program enables local governments to apply for assistance to:

- Undertake heritage planning activities including heritage studies and making delegated legislation to protect local heritage places in 2009 and 2011.
- Run heritage advisory services. From July 2009 all NSW local governments are eligible for funding.
- Run a heritage fund. From July 2009 all NSW local governments are eligible for funding.
- Regional heritage networks to convene and co-ordinate a regional heritage network.

Local government heritage management funding is tied to certain requirements, including a requirement to prepare and implement (and subsequently report on) a heritage strategy. The strategy must be based on the Heritage Branch's publication - http://www.heritage.nsw.gov.au/docs/info_recommendations_for_local_councils.pdf

The Heritage Branch also provides online advice on other funding sources available at Funding for Heritage places - http://www.heritage.nsw.gov.au/02_index.htm

Heritage tools

Free heritage inventory software, training and support is provided by the Heritage Branch to help local governments compile their heritage inventories. The data adds to the collection of information on NSW's heritage and is published by the Heritage Branch as the NSW Heritage Database - http://www.heritage.nsw.gov.au/07_index.htm

Advice and training

The Heritage Branch delivers training and leadership for heritage advisors and local heritage planners. Currently 68 of the 105 rural councils in NSW are participating in the NSW Heritage Advisory Program.[1]

In addition, the Heritage Branch:

- has a nominated officer who is the direct contact for particular advice, eg. aboriginal heritage advice, industrial heritage advice etc;
- provides guidance on funding opportunities and programs;
- provides advice on heritage amendments to list places;
- runs an email chat group for heritage advisors and hosts an annual local government and heritage advisor network seminar; and
- has prepared guidelines and model consultant briefs for a range of heritage planning studies.

Program reporting and evaluation

The Heritage Branch has prepared:

- a framework of nine recommendations to guide local government in the development of a three year Heritage Strategy; and
- an annual Heritage Strategy reporting template for local government to monitor and report on their Heritage Strategy implementation.

Based on the information provided through the Heritage Strategy reporting, the Heritage Branch prepares a local government heritage management program report and evaluation.

10.2   Victoria

Heritage Victoria supports local government through funding, leadership in policy and provision of tools, advice and training. Victoria has a state-wide heritage strategy 'Victoria's Heritage: Stregthening Our Communities - http://www.heritage.vic.gov.au//Heritage-Victoria/Strategy.aspx - which establishes a framework for heritage management in Victoria.

Funding

Details of funding programs can be obtained through the Heritage Victoria website - http://www.heritage.vic.gov.au/Home.aspx

Victoria's Heritage Grants Program is open to local government and local places listed on the Heritage Overlay of a local planning scheme. In 2009-10 the four funding streams were:

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1   Heritage Council of NSW, Annual Report 2006 – 2007, - http://www.heritage.nsw.gov.au/docs/annualreports/2007_HCAR_Performance.pdf

- Repair and conservation of heritage places and objects
- Interpretation of heritage places and objects
- Local government heritage studies and advice
- Community collections management.

In 2008-09 Victorian local governments shared a total of $300,000 in grants to undertake and implement heritage studies. Grants are also provided to local government to assist with the digitisation of their local heritage studies.

Heritage Victoria provides dollar for dollar funding for over 60 heritage advisor positions around the State, targeting rural, regional and outer metropolitan councils.

Heritage tools

The State Government, through Heritage Victoria encourages local governments to store their heritage data in the 'HERMES' database. Sixty two local governments are currently participating in the scheme to digitise their heritage studies. The use of the HERMES database means that heritage data can be easily accessed via the internet.

Advice and training

Heritage Victoria:

- delivers training and leadership for heritage advisors and local heritage planners;
- provides guidance on funding opportunities and programs; and
- advises on heritage amendments to include places in the Heritage Overlay.

10.3   Queensland

The Department of Environment and Resource Management (DERM) supports local government through funding, leadership in policy and provision of tools, advice and training.

Funding

The Queensland Government has initiated a $5 Million "Living Buildings and Places" heritage conservation fund over three years to support the continued use of key heritage places. Eligible places include listed local places, significant local places that may be eligible to be listed, National Trust listed places and places listed in the DERM state wide heritage survey. This program is administered by the State.

Advice and training

DERM provides indirect economic assistance via technical and policy support and offers owners information on the history of heritage properties, a heritage information kit for owners and information on building conservation and renovation**.**

10.4   South Australia

The Department for Environment and Heritage supports local government through funding, leadership in policy and provision of heritage advisory services.

Funding

Approximately $580,000 has been provided over four years (2005/6 – 2008/9) for local governments to carry out or review local heritage surveys, undertake Heritage Plan Amendment Reports (amendments to list heritage places) and establish local heritage schemes.

Advice

The Department for Environment and Heritage co-ordinates the heritage advisory service which is jointly funded by the State and local governments. Local governments without heritage advisors may seek advice from the Department of Environment and Heritage.

10.5   Western Australia

A promotional brochure encouraging local governments to participate in the Heritage Loan Subsidy Scheme is published online in WA.

The Heritage Council of Western Australia supports local government through funding, leadership in policy and provision of advice and training.

Funding

Grants and incentives include the Heritage Grants Program, the Heritage Loan Subsidy Scheme and the Lotterywest Grants Program. Heritage places listed by local governments are usually ineligible for grants provided through the Heritage Council's Heritage Grants Program; however the Heritage Loan Subsidy Scheme and the Lotterywest grants program applies to both State and local heritage places.

The Heritage Loan Subsidy Scheme provides a subsidy – currently 4% on the standard interest rate of loans – for conservation works to heritage places. The scheme is administered by the WA Local Government Association (WALGA) and the Heritage Council of WA. The scheme assists owners to undertake conservation works. Owners of places listed in a local government municipal inventory are eligible to apply in participating local governments.

Lotterywest Cultural Heritage Conservation Grants

The Lotterywest Cultural Heritage Conservation Grants targets projects where capital investment will assist conserve significant built and moveable cultural heritage.   Projects include conservation of objects and places of cultural heritage significance and conservation of natural heritage places. Local governments are eligible to apply.

Also under the Lotterywest program is the Cultural Heritage Interpretation Grants program, designed to assist communities understand and transmit the significance of their cultural heritage places and objects.   Funding is available for projects such as interpretation plans, public education and information

programs, training, publications and interpretative strategies. Local governments are eligible to apply.

Visit the Heritage Council of WA website for the latest information on grants and incentives programs - http://www.heritage.wa.gov.au/

Regional Heritage Advisors

The Regional Heritage Advisor program is a service wholly provided by the Heritage Council of WA. Regional Heritage Advisors provide guidance on heritage assessments, conservation, funding applications and planning applications. Advisors also assist local governments review their local heritage (municipal) inventories.

10.6   Tasmania
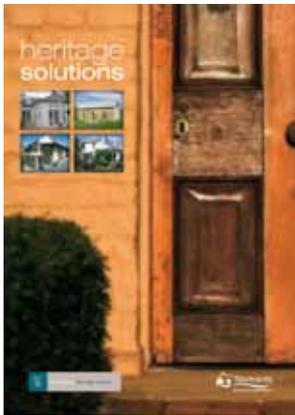
Heritage Tasmania supports local government through the provision of advice, leadership in policy and by coordinating joint projects. In recent years this has included the joint funding and management of local heritage surveys to identify and protect places of local and State heritage significance; provision of advice, both formally and informally, to planning authorities on the management of local heritage places and precincts; support of community education, training and development activities; support of local heritage initiatives; and the provision of funding for conservation of heritage assets listed on the Tasmanian Heritage Register.

A free heritage advisory service exists for heritage assets listed on the Tasmanian Heritage Register.

There is no state-wide heritage advisory service at the local government level, but where local services are provided Heritage Tasmania usually has a close and proactive working relationship with the relevant officer/s. A reform process is currently underway. It is expected that it will expand these mechanisms and better define the relationships, roles and functions of local and State Government.

10.7   Northern Territory

The Northern Territory Incentives Scheme incorporates a $200,000 grants program, rates relief, and a free professional heritage advisory service.

10.8   Australian Capital Territory

The Australian Capital Territory incentives include a $270,000 grants program and a free heritage advisory service.

11. How to establish local government heritage incentive schemes

11.1 Grants and loans

Local governments may establish a local heritage grant or loan scheme to assist owners undertaking conservation works to buildings, sites or objects in the municipality. Local heritage funds are an effective means of generating value beyond the initial commitment.

Local heritage grants may be entirely local government funded or could be joint arrangements with the state heritage agency. In NSW for instance, local governments are eligible for funding on a dollar for dollar basis for grants up to a maximum amount per year. Local governments then administer the grants as appropriate.

Grants are a simple and direct method of assistance.

Loan schemes require more administration and may not be attractive in a low-interest rate environment. However, the schemes are self-perpetuating and the money from repaid loans becomes available for further projects.

While varied, common approaches to loan schemes include the following:

- Places are listed on local municipal inventories or heritage lists and protected under the relevant local planning instrument or scheme.
- Funded works are heritage conservation works (restoration or maintenance).
- Funded works may be structural works or repairs to the exterior of the building.
- There is an obligation to obtain relevant development consents prior to lodging application for funding.
- Endorsement/approval of completed work is required by a heritage advisor or local government officer.
- Minimal or interest free rates are offered on loans.
- Simple application and reporting forms are used.
- Loan applications are evaluated by persons with heritage qualifications, council's heritage advisor or council staff.
- Promotional material (online, print) is developed to launch the call for applications and promote successful applications.
- Funded projects are used as case studies to promote heritage and the fund.

Common ineligibility criteria include:

- Government departments and entities
- Work already commenced
- Routine maintenance, for example painting
- Internal works
- Purchase of a property

- Construction of new additions
- Relocation of a heritage building

The NSW Heritage Branch has produced a guideline to assist local governments in establishing a heritage fund, *'How to Establish a Local Heritage Fund'* - http://www.heritage.nsw.gov.au/docs/info_localheritagefund.pdf   This includes model documents, guidelines and templates which may be adapted to local circumstances.

A range of local heritage assistance schemes are in practice nationally.

Examples:

- Forbes Council, NSW, local heritage fund (published by the Heritage Branch, NSW Department of Planning) - http://www.heritage.nsw.gov.au/docs/incentives/local_heritage_funds.pdf

- Bathurst Regional Council, NSW, Heritage Funds - http://www.bathurst.nsw.gov.au/planning/heritage-management/98-bathurst-region-heritage-fund   Online resources include simple application form and guidelines.   Bathurst Regional Council offers small annual grants to property owners for maintenance works on older buildings, grants are usually offered on a dollar for dollar basis up to $2000.

- Brimbank City Council, Victoria, Heritage Assistance Fund - http://www.brimbank.vic.gov.au/Page/Page.asp?Page_Id=2330   Council offers grants for restoration and maintenance works to heritage properties, offering assistance of up to 80% of the total cost of the works to a maximum of $2000 per property.

- Town of Vincent, WA, Heritage Grants Program - http://www.vincentheritage.com.au/awards.htm#heritageloan   Council offers financial assistance to owners of properties listed on Council's municipal inventory for conservation works or conservation documentation.

- City of Norwood, Payneham & St Peters, SA Heritage Grants Scheme - http://www.npsp.sa.gov.au/site/page.cfm?u=1293   Council offers grants to owners of listed heritage places for conservation works. Assistance is offered up to 30% of the cost of the works to a maximum of $3000 per property.

11.2   Planning and development incentives

Local government planning instruments can provide incentives for property owners and developers. These may include:

- Zoning controls
- Planning incentives
- Transfer of development rights
- Parking, building site ratio and land use concessions
- Flexibility in planning and/or building requirements
- Rate differential/reduction
- Waiver of fees for development applications.
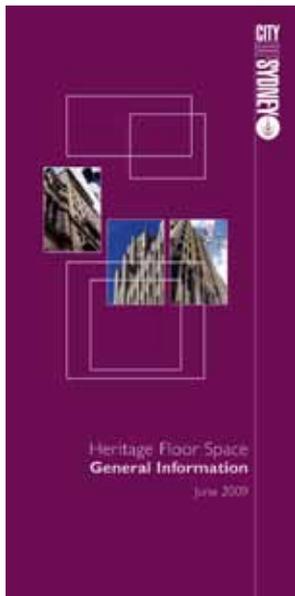
Examples:

- Rate rebates are offered by relatively few local governments (Productivity Commission survey of local governments). In NSW, a rate reduction may be obtained from the Valuer-General for heritage properties.

- The City of Sydney (NSW) operates a Heritage Floor Space Scheme - http://www.cityofsydney.nsw.gov.au/Development/documents/Heritage/ HeritageFloorSpaceUpdateDec08.pdf - which applies to listed properties protected by the local planning instrument. Once conservation works to the heritage place have been completed, the property owner may be awarded Heritage Floor Space which may then be allocated/sold to a site which requires the purchase of Heritage Floor Space as part of an approved development application. Funds raised help conserve the heritage item.

- The Town of Vincent (WA) Town Planning Scheme (Clause 27 Variations to Scheme Provisions) - http://www.vincentheritage.com.au/pdf/ Incentives%20Policy.pdf - allows for variations to the Scheme Provisions in circumstances where it is 'desirable to facilitate the conservation of a heritage place listed in the Heritage list or to enhance or preserve heritage values in a Heritage Area.' This provision enables owners some flexibility in submitting a development application. Additionally, the scheme allows for a land density bonus of up to 50% where the proposed development conserves or enhances a dwelling listed on the Municipal Heritage Inventory.

11.3 Heritage agreements

The use of voluntary legal instruments such as heritage agreements are available under most state Heritage Acts.
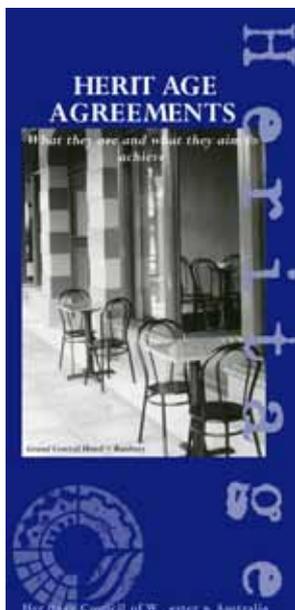
In WA, the Heritage Council can offer incentives to owners willing to guarantee that conservation works will be undertaken. Heritage agreements run with the land and are legally binding on current and future owners. The negotiation of a heritage agreement by the owner and the Heritage Council may include incentives such as rate remissions, land tax reductions, grants, planning concessions and plot ratio transfers.

Voluntary agreements are also common under planning systems, for example in Victoria, voluntary agreements between a local council and land owner setting out conditions on the use or development of the land are prepared under Section 173 of the *Planning and Environment Act* 1987. Heritage agreements can be a useful tool for providing certainty for property owners, however they require resources to administer, monitor and enforce (Making Heritage Happen, 2004:22).

Guidelines for the use of planning or heritage agreements should be formulated by the responsible authority.

Examples:

* Heritage Council WA Heritage Agreement guidelines - http://www. heritage.wa.gov.au/assets/files/General_Publications/Heritage%20 Agreements.pdf

* Australian Capital Territory (ACT) Heritage Agreements guidance - http:// www.tams.act.gov.au/__data/assets/pdf_file/0018/13257/actheritagelegis lationwhatareheritageagreements.pdf

11.4   Revolving funds and conservation trusts

Revolving funds operate through a pool of capital which is typically used to acquire, conserve and re-sell properties with a conservation covenant attached, or to lend to individuals or organisations to buy, restore and protect heritage places (Making Heritage Happen, 2004).

The Historic Houses Trust of NSW operates a revolving 'Endangered Houses Fund' (EHF). Under the EHF significant properties at risk from demolition or unsympathetic development are identified, conserved, protected and re-sold. The first house to be saved through the program was Glenfield in Casula - http://www.hht.net.au/support_us/ehf/project_-_glenfield

The Environment Protection and Heritage Council published an information paper on Revolving Funds for Historic Heritage - http://www.heritage.nsw.gov. au/docs/revolving_funds.pdf - in 2005, detailing how to establish a revolving fund. Local government participation in revolving funds may extend to partnering with state government to run a scheme.

11.5   Encouraging use of heritage properties
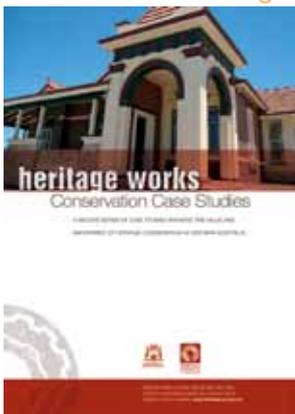
Local governments can encourage the continued use or new use of heritage places. The ongoing use of existing building stock is an important part of conserving heritage.

Government policies and decision-making can encourage the re-use of existing buildings through:

Heritage impact assessment processes that require developers to identify uses for an historic building

Environmental impact assessment processes that compare energy and material requirements for new development against the re-use of an existing structure;

Inclusion of energy savings accruing from use of historic buildings as tradeable credits (Making Heritage Happen, 2004).

The local planning policies of Dungog Shire Council, NSW - http://www.dungog. nsw.gov.au/planning/1082/1859.html - require a statement of heritage impact - http://www.dungog.nsw.gov.au/files/1858/File/Statementofheritageimpact. pdf - prepared in accordance with NSW guidelines, in conjunction with a development application for certain activities or works, such as demolishing or moving a heritage item, building, work, relic, tree or place within a heritage conservation area. The model statement of heritage impact requires consideration of alternatives, options or sympathetic solutions which have been considered and discounted. An argument must be made as to why such discounted options cannot be implemented.

State heritage agencies have published guidelines and case studies on successful outcomes for reusing heritage places. These can be promoted to local communities and developers. Simple, low cost local government versions of local case studies may be prepared and published online or in pamphlet form.

State publications include:

- Heritage Council of WA, Conservation Case Studies (2007) - http://www. heritage.wa.gov.au/assets/files/General_Publications/CCS0509.pdf
- Tasmanian Heritage Council, Heritage Solutions (2008) - http://www. heritage.tas.gov.au/media/pdf/Heritage%20Solutions.pdf
- Commonwealth Government, Adaptive Reuse (2004) - http://www. environment.gov.au/heritage/publications/protecting/pubs/adaptive-reuse.pdf

Local government examples include:

- Town of Vincent, How can we help? Heritage Information and Conservation Incentives - http://www.vincentheritage.com.au/pdf/HOW_ CAN_WE_v2_proof.pdf

11.6   Heritage advisory services

Heritage advisory services were first established in Victoria in 1977 and since that time have developed across Australia.

A heritage advisory service involves appointment of a heritage expert to give free advice to local government officers, residents and businesses on all aspects of heritage conservation. This may include advice on maintenance and repairs, renovations, additions, funding and incentives, policy and strategy. Services are often initially funded through a partnership between state and local governments.

A national guide for government, advisors and the community has been prepared by the Heritage Chairs and Officials of Australia and New Zealand. The Heritage Advisory Services Handbook (2009) - http://heritage.vic.gov.au/ Forms-Guidelines/HCOANZ-handbook.aspx - provides practical advice and case studies for governments and communities seeking to establish a Heritage Advisory Service in the local area.

11.7   Labour and volunteers

Volunteers have long worked in the areas of natural and cultural heritage and are a key resource in heritage management. Formalised arrangements for volunteering exist in most states and territories. Most states, territories and local governments publicly recognise the contribution of volunteers.

Local governments can participate in state-run heritage volunteer programs, can run their own volunteer projects and can reward existing volunteers serving the community.

Examples of programs include:

* Heritagecare (Victoria) – http://www.heritage.vic.gov.au/Volunteer-community/Heritagecare.aspx - assists public and private owners of heritage places by providing volunteers to conserve important heritage places, objects and collections. Programs include the Community Stewardship program and Hands on Heritage. Heritagecare is delivered on behalf of Heritage Victoria by Conservation Volunteers Australia - http://www.conservationvolunteers.com.au/

* The NSW Government recognises heritage volunteers with an award ceremony each year - http://www.heritage.nsw.gov.au/09_subnav_05_08_01.htm

11.8   Recognition and promotion

Information, awareness and promotion campaigns are essential for effective local government heritage management. Examples of heritage recognition and promotion events include heritage festivals, 'open' schemes, National Trust activities, publications, interpretation programs, plain English guides, seminars, design and conservation awards, tours and other programs designed to engage and educate.

Examples include:

* Waverley City Council (NSW) which recognises good heritage development through their heritage design awards - http://www.waverley.nsw.gov.au/building_and_development/Heritage_and_Design/heritage_design_awards

* City of Ipswich (Queensland) which publishes plain English guidelines for owners on:
    – interpreting Character Provisions in Council's planning scheme - http://www.ipswich.qld.gov.au/about_ipswich/heritage/heritage_buildings/character_provisions/
    – House Types - http://www.ipswich.qld.gov.au/about_ipswich/heritage/heritage_buildings/house_types/
    – How to find out about the history of your home - http://www.ipswich.qld.gov.au/about_ipswich/heritage/heritage_buildings/history_of_your_home/

- Frequently asked questions about development, restoration and heritage paint colours - http://www.ipswich.qld.gov.au/documents/heritage/frequently_asked_questions.pdf

- A free local heritage education kit - http://www.ipswich.qld.gov.au/community/education/heritage_education/index.php - is also provided to local schools.

- City of Norwood, Payneham & St Peters (SA) which publishes plain English guides for owners on Conserving our City's Heritage: A guide for property owners - http://www.npsp.sa.gov.au/webdata/resources/files/ConservingOurHeritage05.pdf

- Southern Midlands Council (Tasmania) which publishes online, heritage-based resources in plain English - http://www.southernmidlands.tas.gov.au/site/page.cfm?u=280

- Town of Vincent (WA) which has a dedicated heritage website - http://www.vincentheritage.com.au/ - with online resources and information including the municipal inventory, awards and incentives information, resources and council contacts. Information for owners includes a glossary of heritage terms and the basics of what is heritage conservation? - http://www.vincentheritage.com.au/pdf/WHAT_DO_WE_MEAN.pdf

11.9   Private/public partnerships

Local government and local communities can seek sponsorship from businesses or service groups to fund heritage conservation projects and activities.

- The Restoration Appeal led by the National Trust of Australia (Victoria) - http://www.nattrust.com.au/ - for the heritage listed Skipping Girl neon sign in Abbotsford, Victoria, attracted financial sponsorship from electricity provider AGL - http://www.agl.com.au/ - in addition to National Trust members, the Victorian Government, the Melbourne Heritage Restoration Fund and individual donors.

- The National Trust of Australia (Victoria) runs a National Trust External Appeals System to manage their fundraising and to provide tax deductible status to donations. The Australian Tax Office enables the Trust to extend their tax deductibility status to heritage appeals operated by other organisations. Criteria to participate in the system include community ownership or management of the heritage place where it is a restoration or conservation project. The Victorian Government currently offers a pilot Top-Up Scheme as an additional incentive to community groups raising funds for conservation of public heritage places. Groups utilising the National Trust External Appeals System who are advanced in achieving their target are eligible for a Top-Up Grant of up to $10,000.
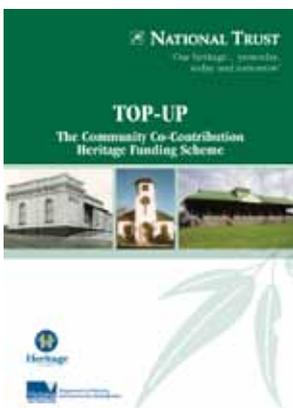
11.10   Tax incentives

The Australian Government allows tax deductions to be made for certain works carried out on income-producing properties through Section 53 of the *Income Tax Assessment Act 1936*. This applies whether the place is heritage listed or not.

Tax deductions may apply to maintenance and repair work on premises used to produce an assessable income. The work can include returning part of a building to its former condition, but work that constitutes an improvement will not qualify.

Depreciation may be claimable for improvements that directly relate to income-producing activities. This applies generally to plant and equipment only, but can include the building itself where it is an integral part of the working plant.

Deductions and depreciation are claimed within annual income tax returns. The most advantageous result may be a combination of tax deduction and/or depreciation. It is advisable to consult a financial adviser to discuss your particular circumstances (Heritage SA, 2009).

APPENDIX A

Key attributes for successful local heritage management

Following is a list of the key attributes for successful local government heritage management. Depending on local circumstances, a local government may only demonstrate a few of the attributes described below. At a minimum, local governments should strive for a combination of some statutory tools and some proactive incentives to achieve positive results in local heritage management.

A successful heritage manager is a local government that:

1. is supported by a state government that demonstrates leadership and best practice in heritage strategy and practice; that obliges local government to identify, conserve and appropriately manage local heritage; that has a state heritage policy or framework; that provides assistance and long term funding for heritage places and objects; and which has a reporting and evaluation system to assess the condition and management of the states' heritage.

2. through the development and implementation of a heritage strategy, plans for and funds strategic and statutory heritage management as a key component of its planning and regulatory roles.

3. has a corporate commitment to heritage.

4. invests in good advice and develops the heritage skills of staff.

5. provides free advice, information and support to heritage owners, developers and the wider community through provision of a heritage advisory service.

6. provides plain-English resources on heritage protection and management to owners, developers and the wider community.

7. prepares statements of heritage significance for individual places and heritage precincts through a thorough, defensible and consultative assessment process.

8. uses statements of significance to guide decision making in relation to heritage places.

9. embraces a wide definition of heritage to achieve a comprehensive heritage list and provides statutory protection for those identified places.

10. integrates heritage management as an essential component of environmental and sustainable development management.

11. provides fiscal and other forms of incentives to owners and developers.

12. undertakes heritage promotion and education, interprets significant local heritage and promotes heritage tourism.

13. builds capacity for community management of heritage by providing opportunities for volunteerism and by providing training and/or information to heritage place owners..

14. recognises and rewards volunteer participation and positive outcomes for heritage places (for example, through restoration or reuse projects).

15. builds effective working relationships with relevant tourism, arts, community, and state heritage organisations.

Additional measures local governments may wish to consider are those that:

•   apply best practice heritage practices and principles (the Burra Charter)
•   encourages the use of heritage experts

Key actions for local government include:

- Obtain Councillor support and understanding of heritage.
    - o Councillors need to support heritage both at the strategic and statutory level. Local government heritage planning is inherently political making proactive and positive engagement of Councillors, beyond statutory decision making on contentious issues, essential. Councillor support provides a solid base for developing and implementing a long term heritage strategy for the municipality.

- Make it a corporate policy to conserve and interpret local heritage. Seek to promote the benefits of heritage to gain community support for heritage.
    - o The Southern Midlands Council (Tasmania) has embraced heritage as a key element of the local area's future prosperity through cultural tourism.
    - o Melton Shire Council (Victoria), when exhibiting a heritage amendment listing heritage places, ensured that relevant Council officers understood the purpose and impact of the amendment and were able to appropriately and effectively pass this information on to the community.

- Have a heritage strategy.
    - o Almost all of the successful case studies profiled in various state publications have a heritage strategy. Examples of excellent local heritage strategies are the Town of Vincent (Western Australia) - http://www.vincentheritage.com.au/docs/Heritage%20Strategic%20Plan%20 September%202007.pdf - and Broken Hill (New South Wales) - http://www.brokenhill.nsw.gov. au/files/3618/File/Draft_BrokenHillHeritageStrategy2006.pdf

- Get good heritage advice.
    - o The heritage advisory service in Broken Hill is a successful partnership between local government and the community. Heritage advisors and heritage officers who are skilled both technically and in working with the community, can make a significant difference.

- Prepare a rigorous heritage study.
    - o Make sure your heritage study is comprehensive, uses standard heritage criteria and threshold assessment and is defensible through public exhibition.

- Adopt a holistic approach to heritage.
    - o Pursue a holistic approach beyond statutory planning. The City of Whitehorse (Victoria) has developed a program 'Approaching Heritage Holistically' which proposes that protecting areas of heritage significance requires more than planning scheme controls. The program is a joint project involving City of Whitehorse officers, Councillors, Heritage Groups, Libraries, Neighbourhood and Community Houses and residents.

- Run a local heritage fund.
    - o In Brisbane, a marked reduction in objections to listings followed the introduction of a local heritage funding program. Even proportional funding combined with a free heritage advisor program can assist with changing negative attitudes to heritage listing.

- Be creative in promoting heritage.
    - o Involve the community in interesting ways, for example through archaeological digs or heritage-based competitions.

- Be flexible.
  - Local governments can waive development fees and consider planning trade-offs to achieve a conservation outcome.

- Be clear.
  - Successful local governments communicate in plain English. Prepare fact sheets and brochures that explain what heritage listing means and have examples of the types of changes that can be made to heritage places. The Town of Gawler (SA) has published a simple brochure 'Town of Gawler Development Policies Protection of Gawler's Heritage' - http://www.gawler.sa.gov.au/webdata/resources/files/development_heritage.pdf - explaining what it means to be heritage listed. The City of Brisbane has published a Guide to Brisbane's heritage places - http://www.brisbane.qld.gov.au/bccwr/lib188/bcc5428%20heritage%20fact%20sheet_screen_1.pdf

- Educate the community.
  - Bathurst Council (NSW) publishes a brochure 'Heritage Survival Kit' - http://www.bathurst.nsw.gov.au/images/stories/pdfplanning/heritage_survival_kit.pdf - for residential buildings which is a model of simplicity.

  - Melton Shire Council (Victoria) has participated in projects to celebrate the unique heritage of their region through promoting the cultural heritage of Dry Stone Walls - http://www.melton.vic.gov.au/Files/DSWbrochure_page_1.jpg This assists to widen the scope of what heritage is and is a positive community project run concurrently to a statutory heritage listing process for other heritage places.

- Consult with the community early.
  - Consultation should have an end point and should be meaningful for participants. Notification and exhibition of heritage amendments is a legislative requirement and usually involves legalistic notices and advice. Planned community consultation during the heritage study or survey and ongoing consultation during the legal exhibition period is essential. Local governments are delivering increasingly sophisticated consultation programs. Southern Midlands Shire Council (Tasmania) publishes updates and reports on the progress and status of local heritage projects - http://www.southernmidlands.tas.gov.au/site/page.cfm?u=280

- Adapt state guidelines for local circumstances or devise your own.
  - Many local governments who lack state direction have devised their own heritage provisions which work well for their local environment.

- Promote local successful case studies.
  - Broken Hill Council (NSW) utilises before and after photographs to show the results of heritage restoration and conservation works. The Council also reports on implementation of programs such as the Verandah Program - http://www.heritage.nsw.gov.au/docs/brokenhill_verandahprogramreport.pdf

- Reward volunteers and community efforts to conserve heritage.
  - Private owners and the community play a significant role in heritage conservation and their efforts can be acknowledged.

  - In Indigo Shire (Victoria), Council's heritage awards program - http://www.indigoshire.vic.gov.au/news-1/heritage-awards/ - rewards owners, community groups and volunteers for a wide range of heritage conservation activities, from conserving movable heritage to the most

sympathetic adaptive re-use of a heritage building.

- Lead by example and manage your own heritage assets.
  - o   Southern Midlands Council (Tasmania) has found that doing the right thing by your council-owned assets goes a long way to inspire the community.

- Partner with state government.
  - o   Where resources are scarce, states such as Queensland and Tasmania partner with individual local governments on projects, heritage studies and workshops or provide seed funding to kick-start a heritage program.

- Partner with others. Seek cultural tourism opportunities.
  - o   The Cobb & Co Heritage Trail - http://www.cobbandco.net.au/ - is a project that commenced in 1997 through a partnership between Bathurst City Council (NSW) Councillors, a local coach builder and Bathurst's heritage advisor. A number of other local governments participated in recording the history of Cobb & Co and today the award winning tourist trail is promoted by a website and annual festival.
  - o   The Town of Gawler (SA) has published a heritage trail of Historic Hotels - http://www.gawler.sa.gov.au/webdata/resources/files/Gawler_Pub_Brochure1.pdf - in partnership with Coopers.

- Seek alternate funding opportunities.
  - o   Heritage agencies in each state are a limited source of funding. For the Dry Stone Walls project, Melton Shire Council (Victoria) received funding from a Victorian Government program (Pride of Place) for urban design initiatives.
  - o   The City of Norwood, Payneham & St Peters (SA) partnered with Flinders University on an archaeological project.

- Know what is significant in your area and promote it.
  - o   Every local area is unique and will have its own history and heritage to conserve and celebrate. The Gold Coast (Queensland) - http://www.goldcoast.qld.gov.au/t_standard.aspx?PID=961 - is promoting its 20th century heritage, Melton (Victoria) its Dry Stone Walls, Bathurst (NSW) promotes its associations with Cobb & Co and Southern Midlands (Tasmania) its Georgian heritage.

- Build partnerships and include heritage in broader community cultural and social festivals.
  - o   Regional networks, such as the Hunter Heritage Network in Bathurst (NSW) - http://hunterheritagenetwork.org/ - or informal partnerships as evidenced in WA and QLD have been developed where state leadership is not as formalised.

- Another measure local government can consider (perhaps in conjunction with NGOs) is organising and presenting heritage seminars and conferences and presenting papers at conferences on heritage experiences such as Cessnock City Council (PIA conference Pokollbin, May 2003) and Ballarat City Council (29 Oct-1 Nov 2006).

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