

Guidance notes for applicants

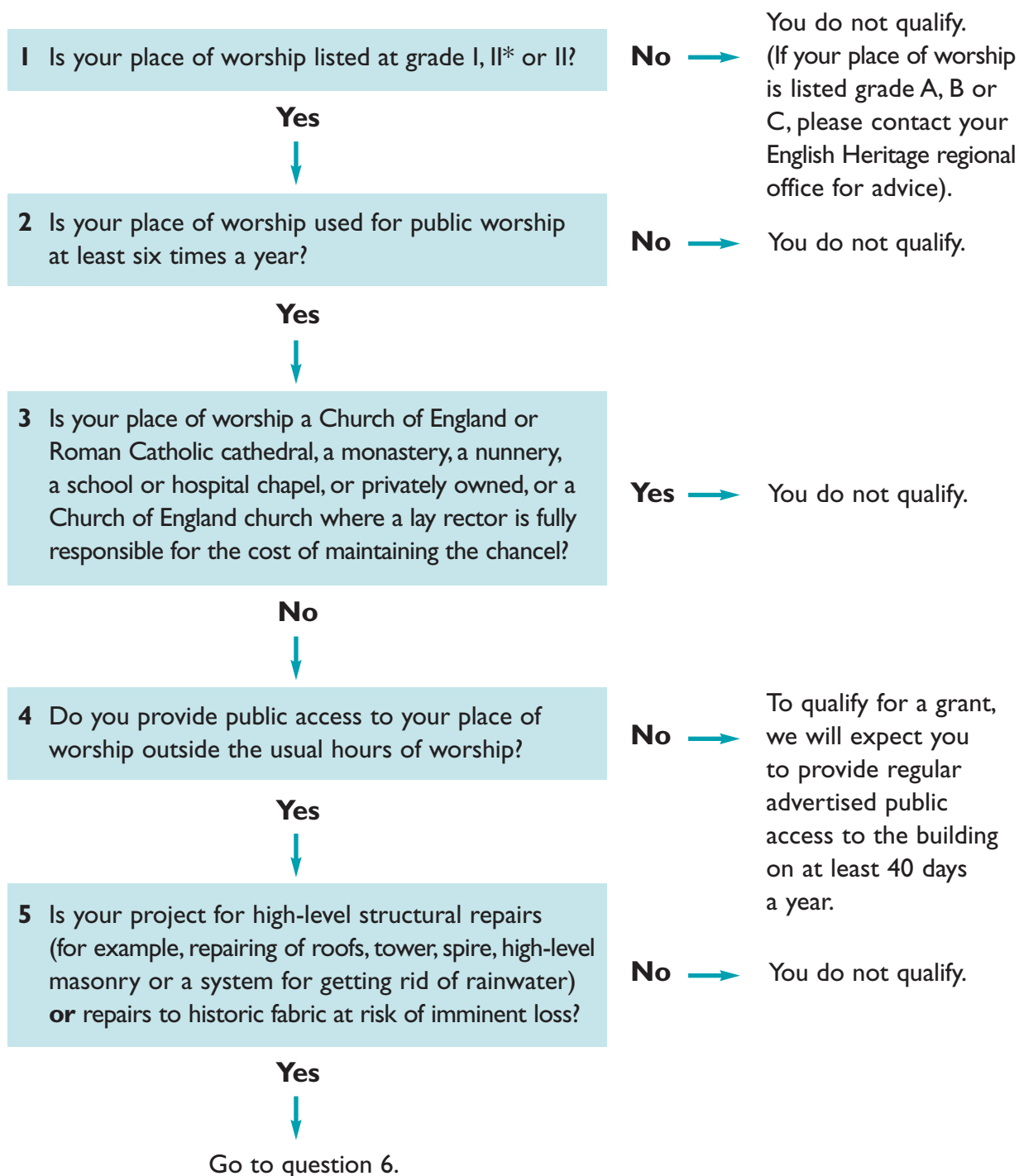
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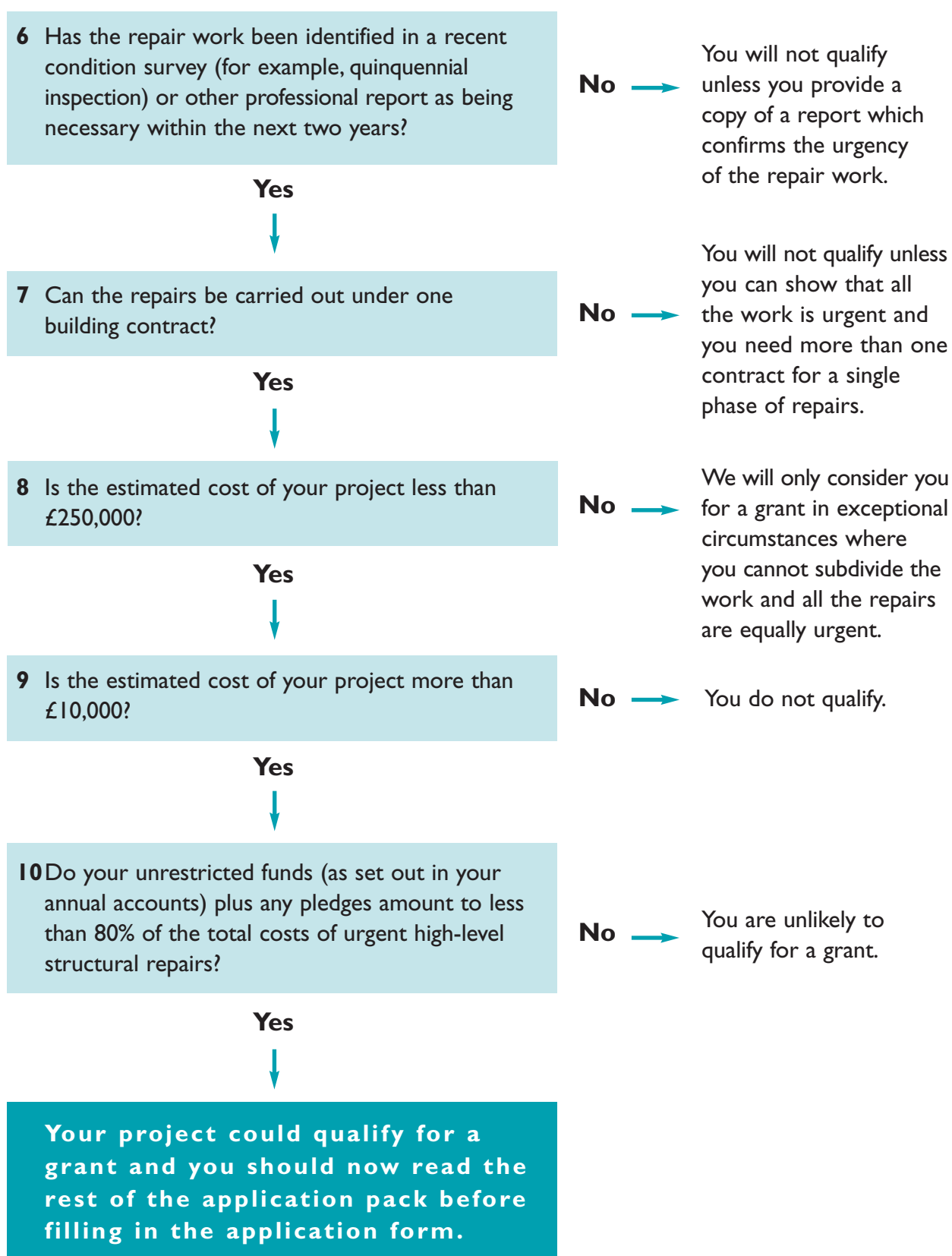
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Repair grants for places of worship in England

Is this the right grant scheme for you?

We have designed this flowchart to help you work out whether or not your project is likely to qualify for a repair grant under this scheme.





If your project does not qualify for a grant under this scheme, one of our other schemes may be able to help you. Please contact your English Heritage regional office or the Heritage Lottery Fund to discuss the matter.

1 Introduction

The scheme is jointly funded by English Heritage and the Heritage Lottery Fund to support urgent repair projects at listed places of worship in England. All grants will be based on a two-stage process. We offer stage-one development funding for those projects that successfully meet our assessment tests and seem most likely to qualify for a stage-two grant towards the main repairs. We will only provide repair grants when projects are fully developed and you know the actual costs. This will avoid any need for you to apply for an increased grant once a repair scheme is underway. We will divide applications into two competitive batches each year, depending on the listing grade of the building.

Although grant offers will be made from the Heritage Lottery Fund and English Heritage, the day-to-day administration of the scheme will be carried out by English Heritage regional offices on behalf of both organisations. They will be your main contact throughout the application process and you should direct any enquiries to them (phone numbers and addresses for the regional offices are listed on page 26).

2 Our priorities

Structural repairs

This scheme is for urgent repairs to the fabric of the building only and is open to all public places of worship in England listed grade I, II* or II. We will not consider applications for other work (including proposals for new facilities) for a grant under this scheme. The Heritage Lottery Fund will continue to welcome applications for projects other than urgent repairs concerning places of worship under their other grant programmes, as long as you can meet their requirements, one of which will be that any urgent structural repairs have been done.

Supporting small-scale projects

We aim to grant aid as many places of worship as possible, and we will target our funds at single repair projects costing less than £250,000 (including fees and VAT), normally to be carried out in a single contract. We will only consider large-scale projects costing £250,000 or more in exceptional circumstances where you cannot divide the work and all the repairs you propose are equally urgent.

Well-planned projects

We aim to offer grants towards projects:

- that are based on proper planning and adequate investigation;
- where the costs and the risks of proposed work are known before a repair programme begins; and
- where the lead professional adviser has conservation accreditation.

Regular maintenance

This scheme aims to help congregations prepare appropriate and cost-effective long-term maintenance plans for their places of worship. Modest spending on regular maintenance reduces the need for costly repairs, protects your place of worship and should save you money in the longer term. While we are prepared to help fund a maintenance plan, maintenance costs themselves do not qualify for a grant.

Guaranteed public access

One of our main priorities is to promote a wider appreciation of historic places of worship. Repairing important buildings can benefit the community, but visitor and community access is an important way of providing for increased understanding and enjoyment of our heritage. We think it is important that people are able to visit grant-aided places of worship outside the normal hours of worship.

3 Applying for a grant

3.1 Who can apply?

We welcome applications from congregations from all faith groups and denominations which are responsible for maintaining and repairing their place of worship. However, you must be a formally constituted religious organisation. This means that if you do not have charitable status or are not organised as a parochial church council, you will need to send us a copy of your constitution (for example, a Memorandum and Articles of Association) with your application so that we can check whether we can offer you a grant.

For some Church of England buildings, a lay rector may be responsible for work to the chancel. If this applies in your case, you should contact your English Heritage regional office for more advice. We cannot offer grants for repairs to a chancel if a lay rector is fully responsible for the cost.

3.2 Which buildings we will support

Your building must be listed grade I, II* or II and must be regularly used as a place of public worship on at least six days of the year. If your place of worship is listed grade A, B or C, please contact your English Heritage regional office for advice. Any building we grant aid we expect to stay in use as a place of regular public worship for at least ten years after the grant-aided repairs have been completed.

This scheme does not cover:

- unlisted places of worship;
- places of worship which are no longer used for religious purposes;
- Anglican or Roman Catholic cathedrals;

- privately-owned places of worship;
- chapels in schools, hospitals or other institutions;
- nunneries or monasteries;
- buildings used or available for use by a minister of religion totally or mainly as their home from which they perform their duties; or
- repairs to the chancel of a Church of England church where a lay rector is fully responsible for the cost.

3.3 Applying for English Heritage funding only

Some religious authorities or congregations may not want to apply for lottery funding for moral reasons. You should show this on the application form and support it with a copy of the relevant resolution, as set out in the minutes of the meeting where the decision was taken. English Heritage will then process your application and any grant will be made from English Heritage funds alone. However, you should note that English Heritage can only consider applications under this scheme for places of worship which are listed grade I or II*. You cannot apply solely for English Heritage funding if your place of worship is listed grade II.

3.4 If you do not qualify under this scheme

If your building does not qualify for help under this scheme, you may be able to apply separately to English Heritage or the Heritage Lottery Fund for grant aid under another grant scheme. Please speak to your English Heritage regional office for more advice.

4 When to apply

Application deadlines

We will deal with applications in two separate batches – one batch will be for places of worship listed grade I and II* and the other will be for places of worship listed grade II.

We will accept applications from 1 April each year and they must be with us by the closing date for the relevant batch, as shown on the application form. We will not assess applications we receive after these closing dates unless there is a real emergency that needs immediate attention and you make the application only for the work needed to solve this emergency.

5 What the scheme covers

5.1 The kind of work we fund

We will only consider grants for urgent repairs that are needed to keep your place of worship structurally stable and weathertight. Most of these repairs are likely to be high-level works to roofs, towers, spires, high-level masonry and systems for getting rid of rainwater. However, we will also consider applications for other urgent repair work if historic fabric is at risk of imminent loss or if there is an emergency affecting the structure of the building.

The focus of the scheme is for single projects with a total cost, including professional fees and VAT, of less than £250,000, normally to be carried out in a single contract. We will only consider large-scale projects costing £250,000 or more in exceptional circumstances where you cannot divide the work and all the repairs you propose are equally urgent. **We recommend that you discuss this with your regional office beforehand.** You can find further guidance on work we fund in section 9.

5.2 The kind of work we do not fund

Alterations and improvements

This includes all new work and additions to your place of worship such as kitchens, toilets, new meeting rooms and community halls. Similarly, improvement work for education and interpretation purposes is not eligible, nor is work to improve physical access. Although the cost of

work needed to keep to the Disability Discrimination Act 1995 and 2005 is not eligible, we will allow for the cost of an access audit when deciding on a grant to develop the project.

Maintenance and minor repairs

This is work that we would expect you to carry out regularly, for example, reglazing broken windows, redecorating inside and outside, and making sure that gutters and downpipes are kept free from blockages and so on.

Conservation work to contents, fixtures and fittings

Examples include work to organs, bells, sculptures, monuments, fixed clocks and clock machinery, altar frontals, reading desks, choir stalls and hatchments.

Building services

This includes renewing or installing heating and lighting systems. We will not give grants for renewing or installing electrical wiring unless you can show that the existing system poses a real threat to the building's fabric (see section 9).

Reinstatement and reconstruction

If you are planning on reinstating completely lost or destroyed elements of the building.

Projects costing less than £10,000 (including fees and VAT).

Work carried out before an offer of grant aid has been made and accepted.

6 Partnership funding

6.1 How much you need to contribute

All grants will be based on an assessment of your financial need.

- There is no standard level of grant and we will tailor all offers to individual circumstances.
- We will always expect you to contribute towards the project costs from your own and other resources (not just the funding you may receive from the Listed Places of Worship Grant Scheme – see the section below).
- The amount of ‘partnership’ funding we expect you to provide will depend on our assessment of your financial need. In judging the level of financial need, we will consider the potential contribution of your congregation, and support from other sources. We will then set this against the total cost of the work needed, after taking account of your congregation’s essential running costs.
- This is why we ask you to provide copies of accounts for all funds that your congregation is responsible for, along with any other accounts held specifically to support your place of worship (for example, Friends’ accounts) and a note of any restrictions on how they can be used. We will also estimate how much you can reasonably be expected to raise both from within your congregation and the local community and from other grant-giving organisations and sponsors.
- As a result, you will need to explain the fundraising strategy for your project.

VAT and the Listed Places of Worship Grant Scheme

The Listed Places of Worship Grant Scheme (see also section 10.8 below) returns, in the form of a grant, the full amount of VAT you spend on eligible repairs and maintenance of your listed place of worship, including relevant professional fees. We make a presumption that you will apply to the scheme, and we will work out grant offers under our scheme to take account of the grant you are likely to receive under the Listed Places of Worship Grant Scheme. You can get more details about the scheme from:

Listed Places of Worship Grant Scheme

**PO Box 609
Newport
NP10 8QD.**

Phone: 0845 601 5945
(calls charged at the local rate)

www.lpwscheme.org.uk.

We strongly advise you to apply for a Listed Places of Worship Grant for any work carried out to repair or maintain the fabric of your place of worship, whether this is with or without our grant aid. In our assessment we will continue to treat VAT as an eligible cost but the Listed Places of Worship Grant will be included in the estimate of partnership funding we expect you to raise.

6.2 Fundraising for your project

You must have all your partnership funding in place before we will offer a grant for the full repairs.

We expect you to organise your own fundraising initiatives. You should aim to develop a fundraising strategy as soon as you are aware of the need for repairs which your congregation cannot afford. Often this will mean voluntary activities such as fetes, sponsored events and appeals. Sometimes a professional organised campaign may be justified, although you should realise that this can be expensive and that we will not contribute towards these costs.

If you need advice on sources of grant and running an appeal, we recommend the following three publications.

- *The Directory of Grant-Making Trusts*
Published by the Directory of Social Change in association with the Charities Aid Foundation. It is available from the Directory of Social Change.

Phone: 08450 77 77 07

Website: **www.dsc.org.uk**

- *Funds for Historic Buildings: A Directory of Sources*
Published by the Architectural Heritage Fund.

Phone: 020 7925 0199

Website: **www.ffhb.org.uk**

- *Fundraising for your Church Building*
Published by the Council for the Care of Churches and available from the Church House Bookshop.

Phone: 020 7799 4064

Website: **www.churchcare.co.uk**

Although this is aimed at Church of England congregations, it has useful information which applies widely.

7 How the scheme works

The process

1 Receiving your application

- We receive your application by the relevant deadline.
 - We will acknowledge your application in writing within a week of receiving it.
 - We will give one of our grants officers your application.
 - We will write to you as soon as possible if your project does not meet the scheme's conditions and priorities.
-

2 Initial assessment

- Our regional team will carry out an initial assessment.
 - We will contact you within three months if we need more information.
 - Our regional or national sift panels (EH and HLF) decide whether to take your application forward.
-

3 Detailed assessment

- Our architect or surveyor will visit the site and carry out a full technical assessment.
 - Our grants officer will carry out a detailed financial assessment.
 - Our sift panel decides whether or not to award your project a grant.
-

4 Stage one – project development

- Once you send us the contract we will make the first grant payment.
 - You will start the project development work.
 - We will assess and agree stage one of your project and make a final grant payment for stage one.
-

5 Stage two – assessment

- You will apply to us to confirm your repair grant.
 - Our regional teams will carry out a full assessment if you ask for an enhanced grant offer.
 - We decide whether to confirm your repair grant, reduce the repair grant or not give you a repairs grant for stage two.
-

6 Stage two – repairs

- Once you return the grant contract to us we make the first grant payment.
 - You will start the repairs and we will monitor the project.
 - We will pay the repairs grant when you claim each payment as you carry out the project.
 - Once you finish the project we will make the final payment of the repairs grant.
-

7 You finish the repairs

- You will put the maintenance plan into practise.
 - You will provide public access to the building for at least 40 days a year.
-

7.1 Making an application

Before you fill in the application form, please answer the questions in the flow chart on pages 2 and 3. This will give you an idea of whether we will consider your project for a grant. It will help you to identify any questions that you need to ask us. If you think your project qualifies, the next step will be to collect the information you will need to fill in the application form. Do not leave any questions unanswered. We will not assess incomplete applications. If you have any questions or are not sure about what information we need, you should speak to your English Heritage regional office (see page 26).

7.2 The assessment tests

The assessment tests for all applications are as follows.

Your application form must be fully filled in. If you leave any parts of the form blank, or if you do not supply the information we ask for in the checklist, we will reject your application.

Your application must qualify under the scheme. You will meet this test if:

- your place of worship is listed when you apply;
- you (or the countersignatory) own the place of worship, either by freehold or a leasehold with at least 15 years to run;
- your building is used mainly as a place of regular public worship at the time you apply or will be once the grant-aided project is finished;
- you are a formally constituted religious organisation, worshipping in the building or intending to do so once the grant-aided project is completed;

- you provide, or will provide, regular advertised visitor access on at least **40** days of the year, outside the usual hours of worship;
- your project involves high-level structural repairs or repairs to historic fabric at risk of imminent loss; and
- your application is for urgent repairs needed within the next two years which are clearly defined and supported by a professional assessment.

You must show that you cannot afford the work. We will not offer grants if your congregation appears, from the information you have given, to be able to meet the cost of work without our help. If we do offer a grant, we will still expect you to find part of the cost yourselves (see section 6).

Your project must be urgent compared with other applications. We will look at applications together to see which are the most urgent in your region. If your project is estimated to cost more than £250,000, we will consider it at a national level, against a more competitive standard than for smaller projects (see section 5.1 above).

Your project must meet regional priorities. If we need to prioritise further, we will give priority to those places of worship which:

- are in geographical areas that have benefited less from our grant aid in the past; or
- are in areas of economic or social deprivation.

7.3 How we deal with your application

We will confirm that we have received your application

As soon as we receive a filled-in application form with all the information we ask for in the checklist, we will write to let you know who is dealing with it. This person will be your normal point of contact.

Make an initial assessment

We will look at whether your application meets the assessment tests set out in section 7.2. To make sure that we award grants to projects of the highest priority, we will assess all applications we receive by the deadline on a regional basis and at the same time. This batched assessment is a competitive process. We will look at how well you make your case as well as considering the conservation need of the proposed project.

While we do not expect you to run up substantial costs in putting your application together, it is important for you to make sure that you have filled the application form in fully and that you have enclosed all the information we ask for in the checklist.

We will let you know as soon as we can after our initial assessment if your project does not qualify for grant aid under this scheme.

Arrange a visit

If your application has not been rejected at the initial assessment stage and appears to satisfy our assessment tests and priorities, we will arrange for our architect or surveyor to visit and evaluate your project. If you already have

a professional adviser our architect or surveyor will also want to meet them to discuss the proposed work.

Our architect or surveyor will often reach the same conclusions as your own, but there may be some differences of opinion over the need for the work and its priority or over preferred methods and materials. We will discuss these fully with your adviser before we write our report. The report will outline the work that we will consider for a repair grant and set out the work necessary to develop the project. We will send a copy of this report to you even if your application does not receive a grant.

You should not prepare a detailed specification for your project until you have received a decision on your application. This is because we will want to discuss its preparation with your adviser as part of the project development.

Make a decision

Once our architect or surveyor has visited your place of worship and written a report, we will look again at the eligibility and priority of your project in light of the recommendations in our report. We will then make a decision on whether to offer grant aid towards your project. You should normally receive our decision on your grant application within six months of the application closing date.

At this point, successful applicants will receive funding for developing their project. Once that work is complete we will then consider them for a repair grant. This is what we refer to as the two-stage grant process. We explain this in more detail in section 7.4. If we decide to reject your application, we will explain why.

7.4 Successful applications and the two-stage grant process

We will want to work with you throughout the project development stage to make sure that when the stage-two offer is confirmed it is on the basis of a project where we have already agreed the scope of the work. Our architect or surveyor will expect to work closely with your professional adviser throughout this stage. We expect you and your professional adviser to contact us at the start of the project development stage. For more detailed advice, see our leaflet on Managing your grant, enclosed in the application pack.

Stage one: project development grants

At stage one, we will offer development funding for projects identified as a priority for support. This grant to develop your project will amount to a contribution of 75% (up to £25,000) of the estimated cost of any necessary investigative, survey and recording work, plus the cost of professional fees needed to move your project to the point of receiving tenders based on an agreed specification. This will allow your congregation to work up your project fully so that the necessary repairs are clearly defined and accurately costed. The initial project development stage will also include preparing a costed 10-year maintenance plan (a list of maintenance tasks and the annual cost of them), an access audit and formal public access arrangements for your place of worship. You will need to put the agreed maintenance plan and public access arrangements into practice as a condition of any grant offered towards the repair work. We will only offer development

funding for those projects which have a reasonable prospect of receiving a grant for the urgent repairs proposed. We will not consider increases in project development grants once we have offered them. For more detailed advice on preparing a costed maintenance plan as part of your project development work, see the 'Maintenance plans' leaflet enclosed in this pack.

When we offer you a project development grant, we will also give you an 'in-principle' stage-two grant offer for the repair work. This will give you an idea of the financial contribution that we are prepared to make to the estimated cost of your project. We will only confirm this repair grant when:

- you have carried out any necessary investigative work;
- you have prepared and we have agreed a specification for the repair work, a costed 10-year maintenance plan, an access audit and public access arrangements;
- you have tenders for the repair work;
- you have statutory permission, including permission from your own denomination or faith group if needed; and
- your partnership funding is in place.

You can apply for the repair grant at any time after the development phase of your project has been completed, up to 12 months from the offer date. **If you have not completed your project development within 12 months, we will withdraw the 'in-principle' stage-two grant offer.**

Stage two: repair grants

As long as your project development work has been completed satisfactorily and the repair costs are in line with our 'in-principle' stage-two repair grant offer, we aim to confirm all repair grants within six weeks of receiving a stage-two application. However, there will be cases where the cost of your project or your circumstances change significantly during the project development period. For example, tender prices may differ significantly from the estimated repair costs at the time we offered a grant to develop the project. In these instances we will reassess your case and consider if an adjustment in the 'in-principle' grant for the main repair work is necessary.

In all cases where the repair costs are lower than we estimated at the time we made the 'in-principle' offer, we will make a proportional reduction in our stage-two repair grant offer, unless you can show that the reduced offer would not be enough to allow the project to go ahead (for example, where you have tried but not managed to raise enough partnership funding).

We will offer the repair grant as a fixed financial contribution to the overall costs of your project. Because we will already have given you a grant for project development, you will have had the opportunity to identify the scope and cost of the necessary work. As a result, we will not consider any increases in stage-two grants once the grant contract has been signed by all parties.

We also encourage you to help visitors understand your project both while you are carrying out the repairs and once your project is finished. You can find guidance about ways to acknowledge your repairs grant on the Heritage Lottery Fund's website at www.hlf.org.uk. The Scotland's Churches Scheme's leaflet 'How to Present

your Church's Story' on their website (www.churchesinScotland.co.uk) can help you tell the story of your place of worship. The Civic Trust also has guidance on their website at www.civictrust.org.uk.

7.5 How we pay grants

Stage-one project development grants

We normally pay project development grants in two instalments. We will release 50% of the grant once you have accepted the stage-one offer. We will pay the balance due when you have completed your project development and confirmed what you have spent.

Stage-two repair grants

We also pay grants for the main work in instalments. The number, timing and size of these instalments will be based on an assessment of risk and will vary for individual cases. For most projects, we will make an initial payment of between 25% and 50% of the grant once you accept the stage-two offer and have signed a contract for the main repair work. When you claim the rest of your grant, you will need to send us confirmation of what you have spent. We will normally withhold 5% of the grant until we have received your completion report.

7.6 Monitoring your project

The leaflet 'Managing your grant' enclosed in this pack gives you information on how you should keep us informed of your progress and how well the project is meeting its aims. You will need to send us regular reports on what you have achieved so that we can release instalments of your grant. We may make site visits at important stages of the repair work.

8 Standard conditions of grant

You must accept the project development grant within four months of our offer. You will have up to 12 months (from the date of the offer) to complete this stage of your project. You must accept the repair grant within one month of the offer. The repairs must be started within six months of the offer and completed within two years.

We believe it is important that the public is given full information about the grants we make and the purposes for which they are used. Anyone who receives a grant must publicly acknowledge their grant so that as many people as possible are informed of the benefits resulting from Heritage Lottery Fund and English Heritage grants.

8.1 Conditions covering how the work is carried out

Some of the more important conditions of grant are set out in this section. Please read them carefully before you apply.

Competitive tender

You will need to prepare a procurement strategy for your project (see section 2.3 of the leaflet 'Managing your grant'). We will normally expect you to get at least three tenders for all building work. You will also need a formal building contract, in which you will be named as employer and the chosen tenderer will be named as contractor.

Specification of work

As part of the project development process, you will need to prepare a specification for the repairs for our approval. Once we have agreed the specification you can seek tenders for the work. **Do not start work on the**

repairs before you have received and accepted a confirmed offer of stage-two funding.

European Union procurement regulations

If more than 50% of your project is publicly funded, European Union procurement regulations will apply. This means that you will have to advertise and ask companies to bid for the building contract in the way set out in the regulations (see the leaflet 'Managing your grant'). We suggest that you should begin this process once you have sent us your application. We will send you detailed guidance once we have received your application.

Other permissions

We may need to have detailed discussions with you about your application. It may be better for you to wait until those details have been agreed before asking for any other permissions you need. However, it is your responsibility to get all statutory and planning permissions, including permission from your own denomination or faith group if needed. You may also need to get a bat licence (see the leaflet 'Managing your grant'). Our approval for grant purposes is quite different from any of these permissions. (We will only provide a grant if you have all other permissions you need before the work starts.)

8.2 Conditions applying after the work has been carried out

These grant conditions will apply for a **10-year** period starting from when your project is completed.

Public access

We will also expect you to provide regular advertised visitor access to your place of worship outside the usual hours of worship on at least 40 days of the year and at other times by appointment or through a key holder. You can do this in a variety of ways, through open days, special events such as concerts or community events, or school visits. We consider a day to be at least 6 hours. You will have to confirm your opening arrangements with your English Heritage regional office once a year so that we can publish up-to-date details on our websites.

Research from National Churchwatch has shown that buildings that are open and have a security guard or caretaker are far less likely to be vandalised or burgled than buildings which are locked. You will need to consider personal-safety issues for anyone who is in the building while it is open.

You can find advice on security issues about opening your place of worship and making sure you consider your volunteers' personal safety on the National Churchwatch website at www.nationalchurchwatch.com. National Churchwatch runs free seminars for places of worship and you can find their contact details on the website.

Maintenance

Preparing a costed 10-year maintenance plan will be part of the project development stage. Once you have produced this, you will have to put it into practice as a condition of the stage-two repair grant. You will have to certify once a year during the life of the contract that you have satisfied the requirements of the plan and keep a log of the maintenance work you have carried out.

Major repair problems are often the result of neglect and, if tackled earlier, can be prevented or reduced in scale. You should carry out maintenance work for your place of worship regularly. There is a good list of maintenance tasks and the time when they should be carried out in the section 'Calendar of Care' on the Council for the Care of Churches website (www.churchcare.co.uk), as well as in their publication 'A Guide to Church Inspection and Repair, 2001'. For more detailed guidance on preparing a maintenance plan as part of your project development work, see the leaflet 'Maintenance plans' enclosed in this pack.

Approving future work

We will want to make sure that the character and interest of the places of worship we help are not damaged by alterations. So we ask you to tell us in advance of any application you plan to make for statutory permission that affects the fabric of your place of worship or its character as a listed building.

Repaying the grant

We may recover the grant (totally or partly) if you break any of the grant conditions or if you sell, exchange or otherwise part with your place of worship in the 10 years beginning on the date of the final payment.

If you give us incorrect or incomplete information, we may withdraw your grant. You will then have to repay any grant you have received.

For more details on the conditions which apply to grants under this scheme, see the leaflet 'Grant contracts' enclosed in this pack.

9 Details of the work we can fund

The following sections describe work which may qualify for grant aid. As repairs to historic buildings can be unpredictable, these notes do not cover every situation. As we consider each application on its own merits, we may need further discussion with you. However, the principles will stay the same as set out here.

Sections 9 and 10 describe the technical aspects of the scheme. You may want to discuss the contents with your professional adviser.

We will normally offer a grant towards a single project, to be carried out in a single contract (for example, for urgent high-level repairs, or for repairs to historic fabric at risk of imminent loss, but not for both). Grants are for the most urgent repairs to historic fabric needed in the immediate future (usually no more than two years) grouped together to form a single project. It will be possible to reapply for further phases once you have completed an initial phase of grant-eligible work.

9.1 Building repairs

General principles

Grant-aided repairs should aim to limit the process of decay without:

- damaging the character of the building, or altering the features which give it its historic or architectural importance; or
- unnecessarily disturbing or destroying the historic fabric.

You should remember that it is rarely possible to repair historic buildings to the extent that they:

- will not need further substantial repair for, say, a hundred years; or
- will be maintenance-free.

Repairs for which we offer a grant will normally be carried out using traditional methods and materials appropriate to the building, its history, and its condition. If replacement is necessary, you should do it on a like-for-like basis.

Because of the value we place on keeping historic fabric, we take the view that a number of small repairs, for example, piecing-in new elements in a historic roof, will often be more appropriate than completely renewing it.

In general, we offer grant aid towards conservative repairs, not towards 'restoration'. Reinstating completely lost or destroyed elements of a building or interior is not appropriate and so does not qualify for a grant.

English Heritage's document called 'Conservation Principles, Policies and Guidance' gives more guidance on conservation-based research and analysis on the English Heritage website www.english-heritage.org.uk or from the English Heritage Customer Services Department by phoning 0870 333 1181.

Grants do not cover routine maintenance and minor repairs, such as cleaning gutters and fixing slipped slates.

Urgent high-level repairs

The main focus of the scheme will be to support urgent repair work which concentrates on keeping the fabric structurally stable and weathertight.

This work will normally be characterised as high-level repairs, so will include work to roofs, but may also include work to rainwater goods and to underground drainage to make sure water runs off those roofs effectively. Roofs themselves do not need to be at a physically high level in order to be considered a priority.

Similarly, high-level structural repairs will include work to towers, spires and associated masonry (such as parapets and pinnacles) but may also include structural repairs at a lower level if these are necessary to stabilise the whole structure. If a place of worship does not have a tower or a spire, it can still have eligible high-level structural repairs.

In all cases, the need to carry out urgent high-level repairs will not mean you cannot include other urgent repairs as part of a cost-effective single project. However, it will be important for you to establish that the urgent high-level work is the major part of your project.

Repairs to historic fabric at risk of imminent loss

If there is a threat of imminent loss, we may consider grants for repairs designed to conserve the 'historic integrity' of the building. This category may include repairs to historic window glass or to wall paintings. However, the work must be urgently necessary and you must prove that a delay will result in the unacceptable loss of historic fabric.

Emergency work

In exceptional circumstances, you can apply for a grant for emergency work after the deadlines for other grant applications. In these circumstances, we can only consider a grant for the temporary work needed to prevent further deterioration until you can apply for a further grant in the following year.

The rest of this section gives a summary of the sort of work that can form part of an eligible repair project.

9.2 Stage-one project development work

We will make stage-one offers for project development work, and this can include the following.

Structural investigation, including access and opening-up work

Survey work to look at the structural condition of the building is an essential part of the project before the full repair programme. This work can include putting up temporary-access scaffolding, temporarily opening up and reinstating finishes to allow the scope of urgent repairs to be fully identified.

Monitoring

Carefully-planned monitoring programmes over a suitable timescale with the aim of working out the scope of urgent repairs.

Specialist reports

These reports may include a need for access and investigation work.

(We provide more advice on the scope of professional fees that may be eligible in section 10.3).

9.3 Stage-two repairs

This will cover the substantial permanent repairs that have been identified during the project development work.

Roofs

Repairing roof structures, together with renewing or substantially repairing roof coverings, repairing roof features such as parapet and valley gutters, bell turrets, chimney stacks and pots, cupolas and balustrading.

Leadwork

Renewing roof leadwork if it is no longer serviceable and using lead welding in order to extend the life of lead which is of historic interest. You may need to redesign the substrate (the structure just below the lead) to keep to current good practice. However, you will need to carefully consider the visual and physical implications of this before you make any changes.

To avoid the risk of underside lead corrosion, you should carry out lead roofing between April and September under a temporary roof. If your proposal does not allow for this, you will need to justify it carefully.

If you can prove that there has been a history of lead being stolen from a roof, we may consider a grant for security systems such as lighting or alternatives to lead which are visually acceptable.

Permanent access to carry out maintenance

If difficult access has prevented proper maintenance in the past, installing hatches, handrails or cables, fixed ladders or crawl-boards to improve access for maintenance and inspection may qualify.

Removing rainwater

The wide-ranging repair or replacement of systems for getting rid of rainwater both above and below ground. You should replace lead and cast iron like-for-like, although in certain cases where theft, vandalism or maintenance access is an exceptional problem, there may be a case for using other appropriate suitable materials.

Digging trenches for drains and soakaways in archaeologically sensitive areas (such as churchyards) should be supervised (and possibly done) by archaeologists. You should always get advice. Supervision will be part of the grant-eligible costs.

Proprietary (professionally-made) electric heating tapes in gutters and rainwater heads where access is difficult and weather conditions are particularly severe, or where especially valuable building fabric or contents may be at risk from the guttering and systems for getting rid of rainwater. Providing overflows and weirs to systems for getting rid of rainwater so that, in case of blockage, water is visibly shed away from the building.

Snowboards in gutters tend to decay and cause further problems and so are not eligible for a grant.

Walls

Necessary repairs to external walls including work to their structure, surfaces, decorative elements on the wall surface and wall-coverings or claddings.

Windows and doors

Repairing or replacing elements set in walls such as panels, windows and doors, including their frames, glazing, ironmongery and other fittings.

Historic window glass

Repairing stained and painted glass windows, and historically important plain glass. You will need to take a total approach which considers conserving glass, leadwork, fixings and ferramenta, and provides ventilation.

We will not normally provide a grant for protecting the outside of the windows but we may consider this if the importance of the glass and the proven risk of physical damage justify it. We may consider wire-mesh guards, either stainless steel or black plastic-coated galvanised, set back close to the glazing line and not carried across stone tracery or details. We can only consider isothermal glazing in exceptional circumstances for important historic or medieval glass where you have carefully considered the visual effect and we agree that this is outweighed by the conservation benefits.

Internal structure and features

Repairs to floors, ceilings, walls and partitions, doors, floorboarding, wall panelling and plain or decorative plasterwork, as long as they form part of the special architectural or historic interest of the building.

Damp

Measures to manage rising or penetrating damp if this is directly damaging the fabric or contents of a historic building, including providing surface-water drainage, and improved ventilation, if we believe this is essential. Old buildings need to 'breathe', and keeping 'vapour-permeable' traditional plaster is preferable to replastering in modern, relatively 'impermeable' cement-based plasters.

Providing a damp-proof course simply because the existing structure was built

without one is not eligible for grant aid. Experience has shown that providing damp-proof courses and membranes in historic structures has often transferred damp problems to other areas of the building.

Decoration

We will only provide a grant for decorating if it is necessary to 'make good' after decorations have been disturbed as part of other grant-aided work.

General redecoration is not eligible for a grant.

Cleaning

Cleaning will only be eligible if there is so much dirt on a structure that it must be removed in order to judge the repairs necessary or if chemicals in the surface build-up are damaging the fabric.

In practice, cleaning brickwork or stonework for these reasons is rarely necessary. Unless appropriate methods are chosen and the work is carried out with extreme care by specialist conservation contractors under adequate supervision, it can cause long-term damage. It may also detract from, rather than add to, the appearance of a building.

Cleaning should always be followed by any necessary conservation of those cleaned surfaces.

We will not grant aid cleaning for purely cosmetic reasons.

Pigeon deterrents

Non-electric physical barriers to prevent a build-up of damaging pigeon droppings, where this can be provided in a visually acceptable way and without using chemicals.

Electrical installations

Renewing or installing electrical wiring only if the existing system poses a real threat to the fabric of the building.

The proposed replacement system should be high quality and its design should be compatible with the special architectural interest of the building. Normally we will only consider replacing the existing system, not improving it.

If you apply for a grant for an electrical installation, you will need to provide electrical inspection test results and a report by an independent electrical consultant or engineer, not a contractor.

We will not provide a grant for renewing or installing wiring where no physical threat to historic fabric has been established.

Lightning conductors

Installing or repairing lightning conductors, where every effort has been made to reduce the visual effect of the installation, and the proposals are in line with the recommendations in the joint English Heritage/Ecclesiastical Insurance Group publication *Lightning Protection for Churches – A Guide to Design and Installation* (product code XH 20087). You can get a copy of this publication from the English Heritage Customer Services Department – phone number 0870 333 1181.

Lightning conductor schemes that meet BS 6651:1992 are unlikely to be eligible for a grant. We generally prefer tower-only schemes, after a risk assessment has been carried out.

10 Details of the costs we can fund

We normally offer grants as a fixed contribution towards the total cost of eligible work.

10.1 Stage-one eligible costs

These can include:

- professional fees to prepare a specification for urgent structural repairs, get tenders, and prepare a tender report;
- any other professional fees needed to complete the project development stage;
- structural investigation, including access and opening-up work;
- monitoring;
- specialist reports;
- conservation-based research and analysis;
- preparing a costed maintenance plan;
- preparing proposals for public-access arrangements;
- other temporary building work before the main contract;
- VAT (but see section 10.8 on VAT); and
- an access audit (if you do not already have one).

10.2 Stage-two eligible costs

These can include:

- urgent structural repairs;
- the balance of professional fees needed to complete the work on site,

including those for a co-ordinator under Construction Design and Management (CDM) Regulations 2006;

- further conservation-based research and analysis;
- contracts insurance; and
- VAT (but see section 10.8 on VAT).

10.3 Professional fees

We will only provide a grant if you employ a competent professional with relevant specialist conservation knowledge, ability and experience. He or she will analyse the site, plan and specify the work, and inspect and certify the work while it is in progress and after it is completed. This professional must be a registered architect with conservation accreditation or a chartered building surveyor who has conservation accreditation from the Royal Institution of Chartered Surveyors.

We will expect you to advertise and invite professional advisers to bid for the work. The fee the professional adviser quotes should include:

- preparing a thorough survey of the structure and its condition (including survey drawings);
- preparing a detailed specification and drawings for the urgent and necessary repairs and, where appropriate, recording of the fabric;
- advertising and getting competitive tenders for the repairs including providing a tender report on these tenders and helping you to choose who will carry out the repairs;
- arranging a contract with the contractor

- making regular inspections and valuations of the work on site until it is completed;
- providing us with technical details of both the application and the grant-aided work;
- all expenses such as travelling and photocopying.

If you have already advertised for your professional adviser using an open tendering process, you need to give us details of the process (see the leaflet 'Managing your grant'). We will use the amount it cost you to advertise for your professional adviser when we work out your grant. However, if you have not yet advertised for your professional adviser, we will estimate this amount. You can always contact us if you have any questions about the process of advertising for your professional adviser.

We will use the fee scale in the RIBA's 'A Client's Guide to Engaging an Architect' or other similar recognised fee scales as a guide to the maximum allowances for fees for repairs and conservation work.

We will also include the fees of other professional advisers such as a structural engineer, a quantity surveyor, a building analyst or an archaeologist in our calculations where:

- their services are essential to complete the work properly; and
- they are appropriately qualified and experienced in repairing historic buildings.

It will be a condition of the grant that you employ the team of professionals identified in the report we send with our grant offer. We will use the amount you are quoted for the fees when working out the stage-two grant.

10.4 Co-ordinator

Under the Construction Design and Management (CDM) Regulations 2006, the owner of the building must appoint a co-ordinator for most building contracts. If an existing professional charges a higher fee, or if a fee is charged by a new professional, we will use the costs of employing this professional in working out our grant (as long as they are fair and reasonable).

We will normally use 1% of the eligible costs in these calculations, but this depends on how complicated your project is. You should realise that the percentage fee includes everything such as travelling and photocopying expenses.

10.5 Conservation-based research and analysis

The above-ground fabric of a place of worship, its monuments and below-ground deposits around it, often contain important but subtle and fragile information about the building and its history. Understanding and interpreting the structure is an essential first step in repair work. Creating an appropriate record of the work carried out is an important final stage in most building programmes. All proposals should include some investigation and record making, tailored to the needs of the particular project.

Before you carry out repairs or alterations, it is important to have a record of the structure or the area which will be worked on. Recording may involve looking at the physical structure and at documentary sources. In some cases, the existing records may be enough. This research should note any information about the history and development of the building.

The more extensive the proposals, the more detailed the record should be. You

should also carry out appropriate recording during the work and when it is finished. The final record should show clearly the nature and extent of what has been done. It should include, in detail, a particular record of any part of the fabric of the building that has been newly revealed or destroyed during the course of the work.

If your work is likely to affect the historic fabric significantly, whether above or below ground, you should consult an archaeologist or a building analyst (a specialist in analysing the archaeology, history and architecture of built structures) early on in your planning. You should prepare a conservation plan, if appropriate, before developing detailed proposals.

We can advise you on all aspects of recording, particularly preparing a brief before asking for tenders from archaeological contractors, or in appointing an archaeologist or building analyst. You can also get more advice from your local government archaeologist, or for Anglican churches from the Diocesan Archaeological Consultant.

10.6 Temporary building work

We will consider work to protect the structure from collapse, damage, or deterioration, such as propping and shoring, temporary weatherproofing, putting up protective structures, or controlling plant growth if there is an unavoidable delay before full repairs can be carried out. There could be a delay while the structure is being surveyed or a repair specification is being drawn up.

10.7 Contracts and insurance

It is a condition of our grant that you get competitive tenders for building work.

You will need a formal building contract, in which you will be named as employer and the tenderer you choose will be named as the contractor. Neither English Heritage nor the Heritage Lottery Fund will be a direct party to the contract. The contract will clearly set the responsibilities of the employer and contractor for insurance.

If you need to take out other insurance than that which will be part of the contract cost, we will include the cost of this other insurance when working out the grant-eligible project cost.

10.8 VAT

Grant aid for VAT on work associated with historic building repairs is not straightforward.

Generally speaking, you pay VAT on work to existing fabric. New work is zero-rated. However, repair and maintenance work to listed places of worship is currently eligible for Listed Places of Worship Grant, which you can claim after the work has been done and effectively eliminates VAT on eligible work, including professional fees.

In general, we will offer grant aid assuming that all repair work is liable to VAT and that you will make an application under the Listed Places of Worship Grant Scheme. We will take account of the amount of grant that you can claim for VAT when deciding the financial contribution that we will make to your project. In other words, we will include VAT at 17.5% on the building work and professional fees when we work out the total eligible project cost, but we will count the amount that we predict you will be able to recover from the Listed Places of Worship Grant Scheme amongst your partnership funding.

11 Contacting us

Your comments

We are committed to monitoring the service we provide at all stages of the application process and after a grant has been made. If you would like to make comments and suggestions for improving our processes and publications, please fill in the feedback form enclosed in this pack.

If, after going through the application process, you have a complaint about the way we have handled your application, please write to your English Heritage Regional Director at the address given below.

English Heritage regional offices

Please check our website for up-to-date addresses (www.english-heritage.org.uk).

North East Region

Covering: County Durham, Northumberland, Tees Valley, Tyne and Wear

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Newcastle upon Tyne
NE1 3JP

Phone: 0191 269 1200
Fax: 0191 261 1130
E-mail: northeast@english-heritage.org.uk

North West Region

Covering: Cheshire, Cumbria, Greater Manchester, Lancashire, Merseyside

Suites 3.3 and 3.4 Canada House
3 Chepstow Street
Manchester
M1 5FW

Phone: 0161 242 1400
Fax: 0161 242 1401
E-mail:
northwest@english-heritage.org.uk

Yorkshire & the Humber Region

Covering: East Riding of Yorkshire, North East Lincolnshire, North Lincolnshire, North Yorkshire, South Yorkshire, West Yorkshire

37 Tanner Row
York
YO1 6WP

Phone: 01904 601 901
Fax: 01904 601 999
E-mail: yorkshire@english-heritage.org.uk

West Midlands Region

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The Axis
10 Holliday Street
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East Midlands Region

Covering: Derbyshire, Leicestershire,
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Nottinghamshire, Rutland

44 Derngate
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Phone: 01604 735 400
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East of England Region

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South West Region

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Dorset, Gloucestershire, Isles of Scilly,
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South East Region

Covering: Berkshire, Buckinghamshire,
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195-205 High Street
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London Region

Covering: Greater London

1 Waterhouse Square
138-142 Holborn
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EC1N 2ST

Phone: 020 7973 3000
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Heritage Lottery Fund

For questions about other Heritage
Lottery Fund grant schemes

7 Holbein Place
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SW1W 8NR

Phone: 020 7591 6000
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Customer Services Department

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