

Repair Grants for Places of Worship in Scotland

Grants of up to £250,000

Introduction
and guidance notes



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Introduction

This booklet gives guidance on the grants that are available from Historic Scotland (HS) and the Heritage Lottery Fund (HLF) for repairs to places of worship. You will need to read this guidance before you fill in the application form. If, after reading the booklet, you are not sure whether you have a project that qualifies or you need more help, please contact HS or the HLF for more advice.

Our contact details are on page 21. This application form counts as an application to both organisations.

We will only support urgent repair projects. We will award grants at rates of up to a maximum of 75% of eligible costs, including an allowance for fees and VAT. The maximum grant for each application is £250,000. We will prioritise projects that can be carried out in one phase.

We assess applications in two rounds (see 6.1 and 6.2). At round one you may also apply for development funding from the HLF. This development funding is to help you fully develop your project and to make sure that you know the actual costs.

We take applications twice a year. You must make sure we receive your applications by **28 February** and **31 August**. We will assess them on a competitive basis (against each other). Grants may be awarded by HS or the HLF, or both after we have made our own assessments of your application.

2 Eligibility

2.1 Who can apply?

We welcome applications from all faith groups and denominations. However, you must be a formally constituted religious organisation (that is, governed by a set of rules, known as the constitution). If you do not have charitable status, we will need 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.

2.2 Buildings we support

To qualify for funding under this scheme, your building must be listed or considered to be of outstanding merit. HS can only offer grants for buildings which are considered to be of special architectural or historical importance. To work out if a building is important, HS will assess its merit. In considering this, HS currently categorises buildings which are judged to be outstanding in four bands. In order to use the grant for the most outstanding buildings that are in need of repair, only buildings in the top two bands are usually considered to be eligible for grant (see categories of outstanding buildings enclosed).

In all cases, the building must be open regularly for public worship, and for at least six days of the year. If we offer you a grant, we expect this regular use to continue for at least 10 years after the repairs have been completed.

Buildings we do not support

- Places of worship that are no longer used for religious purposes
- Privately-owned places of worship
- Chapels in schools, hospitals or other institutions
- Nunneries or monasteries

- Buildings that are used, or available to be used, by a minister of religion totally or mainly as their home from which they work.

2.3 If you do not qualify

If your building does not qualify under this programme, you may be able to apply separately to HS or to the HLF for grant aid under another grant scheme. Please contact the HLF or HS (the contact details are on page 21).

Are you eligible

These questions are designed to help you work out whether or not your project is likely to qualify for a repair grant from the HLF or HS.

1 Is your place of worship listed as category A, B or C?

Yes

No You do not qualify for HLF funding. You may qualify for HS funding - please contact HS to discuss further.

2 Is your place of worship used for public worship at least six times a year?

Yes

No You do not qualify.

3 Is your place of worship a monastery, a nunnery, a school or hospital chapel, or privately owned?

No

Yes You do not qualify.

4 Do you provide public access to your place of worship outside the usual hours of worship?

Yes

No You do not qualify.

5 Is your project for high-level structural repairs (for example repairing roofs, towers, spires, high-level masonry or the system for getting rid of rainwater, or repairs to the parts of the historic building that are at risk of being damaged beyond repair?)

Yes

No You do not qualify

6 Has the repair work been identified in a recent condition survey (for example a quinquennial - five - yearly - inspection or other professional report) as being necessary within the next two years?

Yes

No You will not qualify unless you provide a copy of a report that confirms how urgent the repair work is.

7 Can the repairs be carried out under one building contract?

Yes

No We prioritise projects that can be carried out in a single phase.

8 Is the estimated total cost of your project more than £10,000?

Yes

No You do not qualify.

Your project could qualify for a grant and you should fill in the application form.

If your project does not qualify for this grant, one of our other schemes may be able to help you. Please contact HLF or HS for more information.

3 Our priorities for this programme

If you are eligible to apply for a grant, we will assess your project against our priorities for this programme. These are as follows.

3.1 Urgent repairs

We will only offer grants for urgent repairs that are needed to keep your place of worship structurally stable and watertight (see 5.1).

3.2 Supporting small-scale projects

We aim to offer grants to as many places of worship as possible. We will target our funds at repair projects that will normally be carried out in a single contract.

3.3 Well-planned projects

We will only offer grants for projects:

- that are based on advice from a suitably accredited professional in building conservation;
- that are based on proper planning and adequate investigation; and
- where you know the costs and the risks of the work before it begins.

This will help us all to manage risk better.

3.4 Regular maintenance

We aim 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 saves you money in the longer term. The HLF can help with the cost of preparing a maintenance plan through development funding (see also 4.3), but maintenance costs themselves do not qualify for a grant. See our guidance '*Management and Maintenance Planning*' for more information on this. You may also wish to refer to the Church Buildings Maintenance in Scotland website (www.maintainyourchurch.org.uk).

3.5 Guaranteed public access

One of our priorities is to promote a wider appreciation of historic places of worship. Visitor and community access is an important way of providing for increased understanding and enjoyment of our heritage.

It is important that people are able to visit grant-aided places of worship outside the normal hours of worship. This grants programme is designed for places of worship that are used by the public and it is important to make sure that there are no plans for the building to stop being used as a place of worship.

We will expect you to open your place of worship for at least 40 days a year outside the normal hours of worship. This can be done in a variety of ways, through special events such as concerts or community events, or through school visits. The HLF also encourages you to provide information about the history of your place of worship, for example a leaflet or a board inside or outside the building. While the conservation work is in progress you can also provide information and hold events to help people understand it, for example open days where people can meet the conservation team and watch demonstrations. You may find it helpful to read the HLF guidance *Thinking about interpretation*.

4 Applying for a grant

4.1 When to apply

We will deal with applications in two batches. The closing dates for applications are **28 February** and **31 August** each year.

You must send full applications by the closing dates shown. After you have filled in the online form you must send two hard copies of the application form and two copies of the checklist items listed on page 22 of the application form, along with two copies of the countersignature

and declaration, within five working days of sending your application electronically.

We cannot accept applications if you have not given us all the information we need.

If we receive your application after the closing date, we will consider it in the next batch of applications.

4.2 How to apply

Please fill in the application form. Before you fill in the application form, please read these guidance notes carefully and make sure that you are eligible for this scheme by reading section two 'Eligibility' on page 4 or checking the flow chart on page 5. This will show you if we can consider your project for a grant and will raise any questions that you need to ask us. If you think your project qualifies, the next step is to collect the information you need to fill in the application form. **Do not leave any questions unanswered.** If you leave any parts of the form blank, or if you do not give us the information we ask for in the checklist, we will not accept your application. If you have any questions or are not sure about what information we need, you should ask HS or the HLF.

4.3 How to apply for a development grant

You can apply to the HLF for a development grant to help pay some of the costs of developing your project so it meets the standard for the second round. This grant is up to 75% (but no more than £25,000) of the estimated costs of your development work. You can use development funding towards:

- professional fees for preparing plans for urgent structural repairs;
- inviting tenders, (getting quotes for the work needed) and preparing a tender report;

- any other professional fees needed to finish developing the project;
- investigating the building's structure, including the ways into the site and preparing the building so work can start, and opening-up work (opening up walls and ceilings to see damage);
- monitoring the project;
- specialist reports;
- research, and analysing and recording information;
- preparing a 10-year plan to keep the building in good condition;
- preparing ways the public can get into the building at times other than for worship;
- VAT (but see Appendix B on VAT); and
- an official inspection of the accounts of the costs of providing access to the building site, known as an access audit (if you do not already have one).

This allows your congregation to be fully involved in your project, and makes sure that the repairs are clearly set out and the costs worked out correctly. You need to agree a 10-year plan and public access arrangements with us. It is a condition of any grant offered towards the repair work that you put these into practice. The HLF will only offer development funding for projects with a chance of getting a grant for urgent repairs. You cannot ask the HLF for more money for development grants once they have offered them.

4.4 Contributions to your project

One of the main points we consider is whether there is enough support for your project from other organisations. We look at your financial needs and we will match all offers to suit this. We normally offer

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

We will expect you to pay for at least 25% of the project costs from your own money and other organisations or grants that you can get. The exact cost we expect you to pay will depend on our assessment of your financial needs. We will consider how much your congregation can afford to pay and how much support you can get from other sources such as trusts and central funds (see 4.5). We will take that amount from the total cost of the work needed, after taking account of the day-to-day costs of running your building.

This is why we ask you to provide copies of accounts for all the funds that your congregation is responsible for, along with any other accounts held specifically to support your place of worship (for example, friends' accounts (donations) or fabric funds (money put aside by the church every year for repairs), and a note of any restrictions on how they can be used. We will also estimate how much we reasonably expect you to raise from your congregation and the local community and from other organisations and sponsors who provide grants.

VAT and the Listed Places of Worship Grant Scheme

Any grants we award will also take account of the grant that you may receive under the Listed Places of Worship Grant Scheme. It is your responsibility to check your eligibility for a Listed Places of Worship Grant (see Appendix B for more information).

4.5 Fundraising for your project

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

We expect you to organise your own fundraising initiatives. You should aim to develop a fundraising strategy as soon as you are aware that the building needs

repairs which your congregation cannot afford. Often this will mean voluntary activities such as fêtes, sponsored events and appeals. Sometimes a professionally organised campaign may be justified, although this can be expensive and we will not contribute towards these costs. You will need to explain the fundraising strategy for your project.

If you need advice on organisations that provide grants and how to run an appeal, we recommend the following two publications.

The Directory of Grant-Making Trusts, published by the Directory of Social Change in association with the Charities Aid Foundation. Phone the Directory of Social Change on 0845 077 7707. For a copy or order through their website, www.dsc.org.uk, which also shows details of other useful fundraising guides they publish.

Fundraising for your Church Building, published by the Council for the Care of Churches. Phone the Church House Bookshop for a copy on 020 7898 1300. You can also find the text on their website, www.churchcare.co.uk. Although this is aimed at Church of England churches, it has useful information which applies widely.

The website www.ffhb.org run by the Architectural Heritage Fund has details of organisations who may be able to give you a grant to help with repairs to places of worship.

5 What will we fund under this programme

We will offer grants for up to 75% of eligible costs, including an allowance for fees and VAT, up to £250,000 for each application. Please note that this may mean a maximum grant of £125,000 from each organisation.

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 work 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 (the floor, walls and roof of the building) is at risk of being damaged or if there is an emergency affecting the structure of the building. You can find more guidance on the work we fund in Appendix A.

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 purposes is not eligible, nor is work to improve physical access. Although the cost of the work that is needed to keep to the Disability Discrimination Act 2004 is not eligible, you can apply to the Heritage Lottery Fund for the cost of an access audit if you want to apply for development funding.

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 Appendix A).

Reinstatement and reconstruction

We will not support your project if you are planning on reinstating completely lost or destroyed elements of the building.

Projects costing less than £10,000 (including fees and VAT) are not eligible.

Work carried out before an offer of grant aid has been made and accepted, and before you have received our permission to start is not eligible.

6 How we will assess your application

6.1 The assessment

HLF and HS have parallel but separate assessment processes. We will let you know that we have received your fully filled-in application. Then we will assess your application, looking to see if your building meets the following conditions.

- Your place of worship is listed when you apply (for HLF support).
- Your place of worship has been assessed as outstanding (for support from HS).
- You (or the countersignatory – see the application form) own the place of worship, or have a lease with at least 15 years to run for HLF purposes, or 21 years to run for HS purposes.
- 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 outside the usual hours of worship.

- Your project involves high-level structural repairs or repairs to historic fabric that is at risk of being damaged beyond repair.
- We will give a grant only if you employ a competent professional adviser with relevant specialist conservation knowledge, ability or experience. For all projects this professional must be a suitably accredited professional in building conservation. You may wish to consult the appropriate professional body for information on accredited professionals before choosing an adviser. This service should be tendered for to ensure best value. (see appendix B).
- Your application is for urgent repairs which are needed within the next two years. You must clearly set out what the repairs will be. We will compare applications to see which are the most urgent.
- You must be able to show that you cannot afford the work without grant-aid. 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 fund part of the cost yourselves (see section 4.4).

The HLF will give priority to those places of worship which:

- are in geographical areas that have benefited less from our grant aid in the past;
- are in areas of economic or social deprivation; or
- show strong community benefits, including regular use by wider community groups.

To make sure that we award grants to projects of the highest priority, we will assess all applications we receive by the deadline 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 it in fully and that you have enclosed all the information we ask for in the checklist on page 22 of the application form.

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

HS may arrange a visit

If your application has passed HS's initial assessment stage then HS will arrange for an architect or surveyor to visit and evaluate your project. During the visit, the architect or surveyor will also want to meet your main professional adviser to discuss the proposed work.

The 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 that is needed to develop the project. We may want to discuss preparing the report with your adviser as part of the project development stage. We will send a copy of the report to you even if your application does not receive a grant.

We will make a decision

Once the 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 the report. We will then decide whether to offer your project a first round award. This will give you an idea of the financial contribution that we are prepared to make to the estimated cost of your project.

HS and the HLF will make decisions about first round grants within about six months of receiving your application. At the same time, the HLF will also make a decision about any development funding applications you have made.

If we decide to reject your application, we will explain why.

6.2 Successful applications and the two-round grant process

You can apply for the repair grant by making a second round application once development work has finished. This is what we refer to as the two-round grant process.

You will have up to 12 months from the date you are offered a round one grant to finish your development work and make a second round application. You may send us your application as soon as your development work is complete.

Your second round application must show that you have done the following.

- You have carried out any necessary investigative work;
- You have prepared and sent us an agreed specification for the repair work, a 10-year maintenance plan, an access audit and public access arrangements;
- You have tenders for the repair work;
- You have the statutory or ecclesiastical permissions needed; and
- Your partnership funding is in place.

Second round repair grants

We will make second round decisions within six weeks of receiving a full and satisfactorily developed submission.

Work that is eligible at second round can include:

- urgent structural repairs;

- professional fees needed to complete the work on site, including those for a planning supervisor under Construction Design and Management (CDM) Regulations 1994;
- any more conservation-based research and analysis;
- contracts insurance; and
- VAT (but see Appendix B on VAT).

You will already have had the opportunity to identify the scope and cost of the necessary work, and may have been given a grant for project development work at round one, so HS and the HLF will not normally consider any increases in second round grants. There may be cases where the costs of your project or your circumstances change significantly during the project development period. Please contact the HLF and HS to discuss any changes as soon as possible.

6.3 How we pay grants

HLF and HS pay grants in different ways.

How HLF pay first-round development project grants

The HLF normally pay project-development grants in two instalments. They will release 50% of the grant once you have accepted the round one offer, signed the contract and filled in the appropriate documents. The balance of the round one grant will be paid when you have finished your project development and confirmed what you have spent.

How HLF pay second-round repair grants

The HLF normally pay the repair grant in three instalments.

- The first 50% of the grant will be released once you have accepted the second round offer, signed the contract and filled in the appropriate documents.

- Once you have sent the invoices to show how you have spent the first 50% of the grant, you may apply for the next 40%.
- The HLF will keep the final 10% until you have sent them all the invoices to show the total cost of your project.

How HS pay second-round repair grants

HS pay grants in line with a payment plan that suits your project. They will normally withhold 10% of the grant until they have received all the invoices for the work.

Both HS and the HLF will reduce the amount of money in the grant if your final project costs are less than was expected.

6.4 Monitoring your project

We will send you information on how to monitor your project, so that you can keep us informed of its progress and how well it is meeting its aims. Both HS and the HLF will send you a form that you can use to send us regular reports on what you have achieved so that we can release instalments of your grant. We may make site visits while the project is in progress.

7 Standard conditions of grant

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 publicise and acknowledge their grant so that as many people as possible know about the benefits resulting from HS and HLF grants.

7.1 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.

Specification of work

If you are successful at the first round, you will need to prepare a specification for the repairs for our approval. Do not start work on these repairs before you have received and accepted a confirmed offer of second round funding.

Competitive tender

We will normally expect you to get at least three tenders for all building work and for professional fees. You will also need a formal building contract, in which you will be named as the employer and the chosen tenderer will be named as the contractor.

European Community procurement regulations

If more than 50% of your project is publicly funded, European Community procurement regulations will apply. On larger projects this might mean that you have to tender your professional advice in the way that is set out in the regulations and on very large projects, it will also apply to the building contract.

Other permission

After your application has passed round one, you will need to make sure that you get all the planning permission and other permission you need, including permission from your denomination, if it applies. It may be better for you to wait until we have agreed your scheme of work before getting any other permission you may need. We will only provide a grant if you have all the permission you need before the work starts.

7.2 Conditions that apply after the work has been carried out

These grant conditions will apply for a 15-year period for HS grants and for a 10-year period for HLF grants.

Public access

As well as providing access for people to use your place of worship, we expect you to provide for 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. The level of access may be adjusted depending on the circumstances of your case and the size of the grant. You will have to confirm your opening arrangements with HS and the HLF once a year.

Promoting and acknowledging your grant

The funds that the HLF distribute are raised through the National Lottery. The HLF receives one-sixth of the Lottery money that goes to the 'good causes' and it is important to give Lottery players and the public as much information as possible about the grants we make. This is in line with the HLF's commitment to openness and accountability.

As a result, the HLF may publish, on their website, the fact that you have applied to them, what you have applied for and details of any decisions they have made about your application. They may also make this information available to the media. To do this they will use information that you have given us in your application.

There may be times where you would prefer us to delay publishing information relating to your application. The HLF will consider this with you at the time.

If the HLF gives you a grant, you must publicise and acknowledge it. Your acknowledgement of your grant must be clear to all visitors using your place of worship, on publications or displays, or to people taking part in activities. This should be in place as soon as the HLF confirm an award at the second round and before work begins. You must make sure you acknowledge your grant publicly in line with the monitoring documents and minimum conditions set out in the HLF guidance *How to acknowledge your grant*.

Maintenance

Preparing a 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 second-round repair grant. You will have to send HS and the HLF a brief report on maintenance once a year while the grant conditions are in force. Major repair problems are often the result of neglect and, if tackled earlier, can be prevented or reduced. You should plan the maintenance, including day-to-day care, of your place of worship as a regular routine, usually on a five-year cycle. Please refer to the HLF's '*Management and Maintenance Planning*' for more information. You may also find the Church Buildings Maintenance in Scotland website useful (www.maintainyourchurch.org.uk)

Approving future work

Both HS and the HLF will want to make sure that the character and interest of the places of worship we help are not damaged by alterations. You will need to get HS approval for any changes in the first 15 years after getting the grant, by letting them know about proposed alterations that affect the fabric of your place of worship or its character as a listed building. It would help you and us if you consult us before you make any planning applications for major changes. This will avoid problems arising later on.

You must also get approval from the HLF for any changes that you want to make within 10 years of getting your grant.

Repaying the grant

HS may recover the grant (totally or partly) within 15 years, and the HLF within 10 years, if you break any of the grant conditions or if you sell, exchange or otherwise dispose of your place of worship within 10 years of the date we make the grant.

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

Appendix A Details of the work we can fund

The following appendix describes 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 individually, we may need further discussion with you. However, the principles will stay the same as set out here. You may want to discuss these points with your professional adviser.

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.

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

- will not need any more repairs for, say, 100 years; or
- will be maintenance-free.

Repairs for which we offer a grant will normally be carried out using traditional methods and natural materials appropriate to the building, its history and its condition. If something needs to be replaced, you should replace it with an identical item.

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

In general, we offer grant aid towards conservation repairs, not towards 'restoration'. Reinstating completely lost or destroyed parts of a building or interior

is not appropriate so does not qualify for a grant.

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 gutters and downpipes 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 that is at risk of being damaged beyond repair

If there is a threat of damage beyond repair, we may consider grants for repairs that are designed to conserve the historic features of the building. This category may include repairs to historic window glass or to wall paintings damaged by water coming into the building through

the walls, floor or roof. However, the work must be urgently necessary and you must prove that a delay will result in the unacceptable loss of historic fabric.

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

2 First round project development work

The HLF will make first round 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 and temporarily opening up and reinstating finishes allowing urgent repairs to be fully identified.

Monitoring

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

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 Appendix B)

Access audit and 10-year management and maintenance plan.

The initial project-development stage will also include preparing a 10-year management and 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 management and maintenance plan and public access arrangements into practice as a condition of any grant offered towards repair costs.

3 Second round repairs

This will include 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 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 consider carefully the visual and physical effects 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, HLF 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 with the same

material, although in certain cases where theft, vandalism or maintenance access is a 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 costs will be part of the total grant.

Proprietary (professionally-made) electric heating tapes in gutters and rainwater heads where:

- access is difficult and weather conditions are particularly severe; or
- very valuable building fabric or contents may be at risk from the guttering and systems for getting rid of rainwater failing.

Providing overflows and weirs to systems for getting rid of rainwater so that, in case of blockage, water is taken away from the building.

Snowboards in gutters tend to decay and cause more problems so they 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 and fixings, 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 we would prefer you to keep traditional plaster rather than replaster using modern, 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 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 or paint 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 offer grants for cleaning that is 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 (HLF grant only)

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 in line 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 the 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 and 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.

Appendix B Further Guidance

1 Professional fees

HS and the HLF will only provide a grant if you employ a competent professional adviser with relevant specialist conservation knowledge, ability and experience. For all projects this professional must be suitably accredited in building conservation. You may want to ask the appropriate conservation organisation for information on registered professionals before choosing an adviser. You should compare quotations for work to get the best value.

The Royal Incorporation of Architects in Scotland (RIAS) have details of suitably qualified architects who are experienced in repairing historic buildings. Their phone number is 0131 229 7545. (www.rias.org.uk)

The Royal Institution of Chartered Surveyors in Scotland (RICS) have details of suitably qualified chartered building surveyors who are experienced in repairing historic buildings. Their phone number is 0131 225 7078. (www.rics.org)

They 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.

The service provided by your professional adviser should include:

- preparing a thorough survey of the structure and its condition (including survey drawings and a report);
- preparing a detailed specification and drawings for the urgent and necessary repairs or recording of the fabric;
- providing advice on a selection of contractors and specialists appropriate for the work;
- inviting competitive tenders and

providing a tender report;

- arranging a contract between you and the builder;
- carrying out regular inspections and valuations of the work on site until it is completed; and
- maintaining full contact with us on the technical details of both the application and the grant-aided work.

We expect you to ask contractors for tenders for work and services, on the basis of best value (see 7.1).

We will also include the fees of other professional advisers such as a structural engineer, a quantity surveyor 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.

In case where we have agreed that more than one professional adviser is needed, we will work out our grant based on the professional's total fees being no more than 20% of any work that qualifies for a grant. The highest percentage fee we will use in working out grants will include all expenses such as travel and photocopying.

2 Planning supervisor

Under the Construction Design and Management (CDM) Regulations 1994, the owner of the building must appoint a planning supervisor for most building contracts. We will normally use 1% of the eligible costs in these calculations, but this depends on how complicated your project is. 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.

3 Research, analysis and recording

The above-ground fabric of a place of worship, its monuments and ground 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. You can find more guidance on conservation-based research and analysis in the English Heritage publication *Informed Conservation* (product code XH 20171). You can get this from the English Heritage Customer Services Department – phone number 0870 333 1181.

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. Both the HLF and HS have produced published guidelines on conservation plans.

HS 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.

4 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 the employer and the tenderer you choose will be named as the contractor. Neither HS nor the HLF will be part of the contract. The contract will clearly set out the responsibilities of the employer and the contractor for insurance.

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

5 VAT

Applying for grants for VAT on work associated with historic building repair is not straightforward.

The Listed Places of Worship Grant Scheme will give you a grant for the actual amount you spend on VAT on eligible repairs and maintenance to listed places of worship. In general terms, you pay VAT on work to existing fabric. You do not pay VAT on new work. This grant also applies to professional fees. In general, we will offer a grant assuming that all repair work and professional fees are liable to VAT and that you will make an application under the

Listed Places of Worship Grants 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 as part of your partnership funding.

You can get more details about the scheme from:

Listed Places of Worship Grant Scheme

PO Box 609
Newport
NP10 8QD.

Phone number: 0845 601 5945
(Calls are charged at the local rate).
Website: www.lpwscheme.org.uk

We strongly advise you to apply for a Listed Places of Worship Grant for any work to repair or maintain the wall, floor or roof of your place of worship, whether this is with or without our grant aid.

Freedom of information

We have a duty to keep to the Freedom of Information Act 2000 and the Freedom of Information Act (Scotland) 2002. When you sign the declaration at the end of the application form, you are confirming that you have no objection to us releasing sections 2 and 4 of the application form to anyone who asks to see them. If there is any information in sections 2 and 4 of the form that you don't want made publicly available, please say this in the space provided and explain your reasons. We will take these into account when we respond to any request for access to those sections. Otherwise, we will release sections 2 and 4 to the public if asked. We may also be asked to release other

information contained elsewhere in the form and we will respond to these requests after taking account of your rights and expectations under the Freedom of Information Act 2000, the Freedom of Information Act (Scotland) 2002 and Data Protection Act 1998. In those cases, we will always consult you first.

Data Protection Act

Under the Data Protection Act 1998, we will process personal information relating to your organisation, its officers and staff or any other people referred to in your application, for:

- assessing your grant application;
- handling the terms of our grant;
- sharing information with our specialists and monitors;
- keeping you informed about our work, including by email, where an email address is supplied. If you would prefer not to receive information from us which is not connected to your application or grant, you can let us know at any time by sending an email to enquire@hlf.org.uk, telephoning **020 7591 6042**, or writing to **Information team, Heritage Lottery Fund, 7 Holbein Place, London SW1W 8NR**;
- publicising information about your application;
- research related to your application;
- sharing information with other organisations that award grants or Lottery funding and other carefully identified organisations (such as best-practice groups) who may want to contact you about your application or project; and
- other legal or regulatory purposes, or other purposes reasonably related to making grants (such as customer surveys).



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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 in the folder at the back of this booklet. If, after going through the application process, you have a complaint about the way we have handled your application, please write to the Head of the Heritage Lottery Fund in Scotland or the Head of Investment and Projects at Historic Scotland.

Addresses

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Salisbury Place
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38 Thistle Street
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