



## CP 2.11 | Heritage Rate Concession

### Objective

The City of Perth provides the Heritage Rates Concession, to assist owners conserve and maintain their heritage-protected places.

### Scope

This policy applies to Elected Members and the Administration with:

- Decisions regarding incentives to support the conservation of heritage-protected places;
- Decisions on the application of rates concessions to eligible owners of heritage-protected places;
- Working together with owners on the ongoing care and maintenance of heritage-protected places.

### Definitions

#### *Adaptive Reuse Zone:*

The term relates to State and Local Heritage Listed Places within the CBD Retail Core (Malls) and adjacent Places on St Georges Terrace, William Street, Wellington Street and Barrack Street.

#### *Fabric:*

Means the physical element or finish which is part of the heritage value of a heritage-protected place.

#### *Financial Justification:*

Is a statement that includes the cost of works undertaken to maintain heritage fabric and is used to inform Council's decision on whether or not to grant the Heritage Rate Concession.

#### *Heritage Conservation Notice:*

The term as defined under Schedule 2, Part 3, Clause 13 of the *Planning & Development (Local Planning Scheme) Regulations (2015)*.

#### *Heritage-Protected Place:*

The term as defined under Schedule 2, Part 1, Clause 1A of the *Planning & Development (Local Planning Scheme) Regulations (2015)*.

#### *Maintenance:*

Means the continuous protective care of a place so as to retain its cultural heritage significance.



## *Property Maintenance Agreement for Receipt of Heritage Rate Concession:*

Is an agreement with the City of Perth, that is signed by the *Owner or Body Corporate* as part of applying for a heritage rate concession, to agree to the *Maintenance Schedule for Heritage-Protected Places*.

## *Maintenance Schedule for Heritage-Protected Places:*

Is a schedule of weekly, monthly and annual routines and checks to support the protective care of a heritage-protected place, so as to retain its cultural heritage significance.

## Policy statement

1. The City of Perth adopted Heritage Strategy (2020-24) aims to support and manage the conservation of heritage protected places.
2. The City of Perth recognises the important contribution that heritage makes to community, sustainability, cultural identity and the economy.
3. The City of Perth also recognises that heritage is important because it provides a sense of unity and belonging within the community and provides insight into previous generations and our history.
4. Together, the City of Perth and the property owners must ensure that the valuable assets of our heritage are respected and celebrated.
5. The City of Perth's program of heritage incentives is aimed at encouraging and assisting the landowners to retain, maintain, conserve and use Heritage- Protected Places.
6. Heritage Rate Concession is a key component of the City's Heritage Incentive Program and is focused on the maintenance of Heritage-Protected Places for the enjoyment of current and future generations.

## The Heritage Rate Concession

7. Be equivalent to 10% of the general rates for the Heritage Place, to a maximum of \$20,000 per annum with the minimum concession being equal to the minimum rate payment according to the budget valuation.
8. Expire on 30 June 2024, subject to compliance with this policy and subject to review at any time by the City.
9. Be reduced by an amount equivalent to any other rate concessions for which the owner of the property is eligible (seniors and pensioners).
10. With respect to group rated properties (not individually rated), the Heritage Rates Concession will only apply to general rates for the heritage place or places within the group.



## Eligibility Criteria

11. The City of Perth will provide the Heritage Rate Concession if the applicant meets all of the following criteria:
  - (a) The applicant is the registered ratepayer of the Heritage-Protected Place located outside the City of Perth Adaptive Reuse Zone and is a recipient of an approved Heritage Rate Concession between 1 July 2022 and 30 June 2023.
  - (b) The applicant submits the following:
    - (i) A completed Application Form – Heritage Rate Concession prior to the issue of the current rate notice or no later than 60 days from the issue date of the current rate notice;
    - (ii) A signed City of Perth Property Maintenance Agreement;
    - (iii) A current full building insurance certificate;
    - (iv) A pest inspection report dated no later than a year from the application date; and
    - (v) If applicable, (see 12(c) below), the submission of a Financial Justification Statement that adequately demonstrates to the satisfaction of Council that -
      - (a) with respect to non-strata properties, that the cost associated with maintaining heritage fabric is unduly high: or
      - (b) with respect to strata complexes, that strata fees are unduly high due to the cost of maintaining heritage fabric.

## Ineligibility Criteria

12. The City of Perth will not provide the Heritage Rate Concession in any of the following instances -
  - (a) The owner is bound by a Heritage Agreement where a development-based incentive has been granted by the Council, that commits the owner to the ongoing care and maintenance of the property;
  - (b) There is an overdue rate debt to the City on the property, and/or the property owner is in legal conflict with the City;
  - (c) Original floor space of the property (strata and non-strata) comprises less than 50% of the property's total floor space. In these instances, the Council, at the request of the applicant may consider granting the concession if adequate Financial Justification is provided (see 11(b)(v) above).

## Cancellation of the Heritage Rate Concession

13. The City of Perth will cancel the Heritage Rate Concession in any of the following instances-
  - (a) The approved application becomes ineligible in accordance with (12) above;
  - (b) A debt to the Council on the property is overdue for payment;
  - (c) Voluntary withdrawal by applicant;



- (d) The property is not being maintained as per the City of Perth Property Maintenance Agreement;
  - (e) The owner or occupier of the heritage place has been issued with a written Conservation Notice by the City;
  - (a) The full building insurance certificate and/or pest inspection report previously provided to the City has expired and up-dated documents have not been provided.
14. Where applications are cancelled, new applications can be submitted in accordance with (11) above.
15. Where an application is cancelled after the issue of the rate notices, under either Concession, a new rate notice will be issued with the concession amount being reinstated.

## Document Control

### Policy Context

Legislation, standards & external guidelines	<i>Local Government Act 1995 s 2.7(2)(b)</i>
Policies and procedures	
Strategies, plans and frameworks	<i>Heritage Strategy 2020-24</i>

### Document custodian

Alliance	<i>Community Development</i>	Service Unit	<i>City Culture</i>
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### Review management

Next review due:	<i>May, 2024</i>	Document Management Ref:	<i>EDRMS-1336483316-806</i>
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## Document management

Version	Adopted by	Adoption date	Synopsis of changes
1.0	Ordinary Council Meeting	26 June 2012	Council policy adopted
2.0	Ordinary Council Meeting	14 February 2017	Council policy amended (Minute Item Number 13.14)
3.0	Ordinary Council Meeting	1 August 2017	Council policy amended (Minute Item Number 13.5)
4.0	Ordinary Council Meeting	29 May 2018	Council policy amended (Minute Item Number 13.2)
5.0	Ordinary Council Meeting	25 May 2021	Council policy 2.11 adopted – supersedes revoked Council policy 9.2 Heritage Concession (Minute Item Number 16.4)
6.00	Ordinary Council Meeting	31 May 2022	Council policy amended (Minute Item Number 16.3)
7.0	Ordinary Council Meeting	30 May 2023	Council policy amended (Minute Item Number 12.2)