## **Heritage & Place Programme (H&PP)**

## **Capital Projects Summary Sheet (Template)**

Detailed guidance on when this summary sheet needs to be completed and submitted can be found in the main H&PP Programme Guidance.

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| **Project Description** | |
| Project Name & Address | *The location of the project should be marked on the scheme area map and a recent colour image of the historic environment asset should be included.* |
| Type of historic environment asset | *Tell us if this is a stand-alone building or a group of buildings; a building type such as shopfronts; another type of historic environment asset; an area of the historic public realm etc.* |
| Designations | *To include here the Listed building category, Scheduled Monument, or any other local designation.*  *To mark N/A if there is no designation.* |
| Is this a high priority project? | ***Yes / No***  *If yes, tell us why you have prioritised this project.* |
| Ownership status and level of owner engagement | *State the type of ownership / lessees etc. and, at delivery phase application stage, the level of commitment to the project by the owner/lessee. If the asset is in multiple ownership, are all owners in agreement to be involved in the project? Has an ownership association been formed?* |
| Current use / level of occupancy | *To advise if the project involves an asset that is vacant or partially vacant. If so, please also include here the percentage or m2 of vacant floorspace to be brought back into use.*  *Mark N/A as required.* |
| General description & reason for inclusion | *Tell us why you have chosen this project and its contribution to your scheme outcomes. At delivery phase application stage, please also summarise any further information available from the development work undertaken. For example, this could relate to the asset’s condition so you could include any relevant condition surveys or conservation plans as supporting documents.* |
| Summary of proposed/ actual works | *Tell us about the nature and scope of the work either being proposed or being undertaken. Does the eligible work involve comprehensive repair/ partial repair / reuse / adaptation/ reinstatement etc? If your project is a grant initiative, please state any grant criteria you will set*; *any specific focus (e.g., reinstating historic shopfronts); and the rationale and added benefits of having the initiative.*  *Tell us about the level of non-grant eligible works and what is involved.* |
| Summary of climate action considerations | *Tell us how you have assessed the possible impact of climate change in terms of the existing historic environment asset, and any measures that can be or are being taken as part of the) project. Tell us how your project aims to mitigate climate change, improve energy efficiency, and adopt a sustainable approach.* |
| Statutory consents | *If applicable, tell us the position of any required statutory consents including listed building consent, planning permission, building warrant.* *If statutory approvals are required for the work, tell us how you intend to or have ensured the necessary approvals are obtained, and the outcome of any preliminary discussions if applicable.* |
| End use | *If your project involves a vacant property or change of use, tell us if the end use is secured and if it will involve a change of ownership? At delivery phase application stage, please include a feasibility study/ business plan if applicable. A business plan is particularly important where a project involves bringing a building back into use to demonstrate it has a viable and sustainable future.*  *If there is to be no change or if this is not relevant to the project, please mark N/A.* |
| How will the project be delivered and managed | *Tell us who will be involved and responsible for the project delivery. How will project progress be monitored?*  *List the main risks associated with the project and its delivery.* |
| Future management and maintenance | *Tell us how future management and maintenance will be delivered and who will be responsible for this. For example, will a Management & Maintenance Plan for the asset be a requirement of the grant offer?* |
| Start date | *(Or best estimate)* |
| End date | *(Or best estimate)* |
| **Project costs** | *Please provide an itemised project cost breakdown below. At delivery phase application stage, these costs will be estimated. During the delivery stage, these will be based on the actual tendered costs.*  *At delivery phase application stage, if your project is a themed grant initiative then you may not have this detail but please state your total estimate for the cost of eligible works to be tackled by the area scheme.*  *If your project involves the historic public realm, please amend the headings to suit.* |
| **HES Grant eligible costs** | *The sections below should be used to identify the HES grant eligible costs of the project as outlined in the* [***H&PP Guidance***](http://www.historicenvironment.scot/grants-and-funding/our-grants/heritage-place-programme/programme-resources_tab) *and our*[***Guidance for Repair Grants***](http://www.historicenvironment.scot/grants-and-funding/our-grants/heritage-place-programme/programme-resources_tab)***.*** *Pro-rata allowances should be made for prelims, contingencies, and inflation as applicable and the percentage for these should be included.* |
| Roof |  |
| Rainwater Goods |  |
| Masonry |  |
| External Joinery |  |
| Other |  |
| Prelims (xx%) |  |
| Contingencies (xx%) |  |
| Inflation (xx%) |  |
| **Total for HES Grant eligible works** | *Total of the above itemised costs.* |
| VAT on eligible works (xx%) | *VAT can be included if confirmed as non-recoverable by the grantee/s.* |
| Professional fees (xx%) | *Make a pro-rata allowance for cost of professional fees based on eligible works and state percentage of Contract Value. More information on our allowance and conditions for Professional fees can be found in the* [***H&PP Guidance***](http://www.historicenvironment.scot/grants-and-funding/our-grants/heritage-place-programme/programme-resources_tab)***.*** |
| VAT on fees | *VAT can be included if confirmed as non-recoverable by the grantee/s.* |
| **Total HES Grant eligible cost** | *Total eligible works cost plus eligible professional fees and VAT as applicable.* |
| **Total HES Non-Grant eligible costs** | *You should identify which elements are not eligible for HES grant funding as outlined in* ***Part 5*** *of the* [***H&PP Guidance***](http://www.historicenvironment.scot/grants-and-funding/our-grants/heritage-place-programme/programme-resources_tab) *and also include pro-rata allowances for prelims, contingencies, inflation, professional fees, and VAT as applicable.* |
| **Total project cost** | *This is the total of HES grant eligible and non-grant eligible costs.* |
| Funding sought from HES/ % HES grant intervention rate | *Tell us how much funding you are seeking from us for the project and the % intervention rate this represents.*  *At delivery phase application stage, if your project is a themed grant initiative, please state the total HES Grant contribution to the funding ‘pot’ you intend to establish and the % HES grant intervention rate you intend to offer.* |
| % Overall grant intervention rate | *Tell us the total intervention rate including HES and other match funding but excluding the owner’s contribution.* |
| Sources of match funding | *Tell us what other funding will be secured / is secured and the owner’s contribution. If your project is a themed grant initiative, please state the Third-Party grant funding ‘pot’ that you intend to establish.* |