

SIMPLIFICATION OF OUR TECHNICAL ADVISORY PROCESS FOR REPAIR GRANTS UNDER £100K

Updates to our technical advice review (TAR) process for express & small Historic Environment Grants (HEG)

Successful applications at any level to our Historic Environment Grant, which include repair or consolidation works, currently undergo a technical advisory process. Detailed information about this process can be found in our Guidance for Repair Grants. Essentially the process allows HES to better understand and comment on proposed works through the use of Technical Advisory Reports (TARs). However, for express and small grant requests (up to £100k), we would like to trial a simplified process.

Why are we simplifying?

The current TAR process is considered a good fit for large grant projects. It enables exchanges of information at key points in project development, helping to ensure that works adhere to our Advisory Standards for Repair Grants. For express and small repair grants, we want to make our processes more straightforward and easier for the wide variety of projects we receive, and we think that simplification of the technical advice process will help with this.

What are we changing?

For small and express applications, which include repair or consolidation, a more streamlined delivery of our technical advice will now be trialled. Our new process reduces the number of TAR reports and formal information exchanges with you and your professional team. The quality of project design and the delivery of works will still be safeguarded by the appointment of a suitably qualified and accredited conservation professional advisor by you for your project.

Your professional advisor should ensure that information packages being prepared for your project and ultimately delivered during your project is appropriate, and so it is important that the structure of your professional advisory and design team is suited to the nature of work included in your project. In order to have the expertise on-board to properly design and deliver your project your professional team might need to include an architect, a structural engineer, a building surveyor, or a quantity surveyor with proven experience in historic environment projects, but at least one of your team must be suitably accredited. The nature of the project will inform the team structure and which member of the design team will be best placed to lead the team, and which disciplines should hold conservation accreditation.

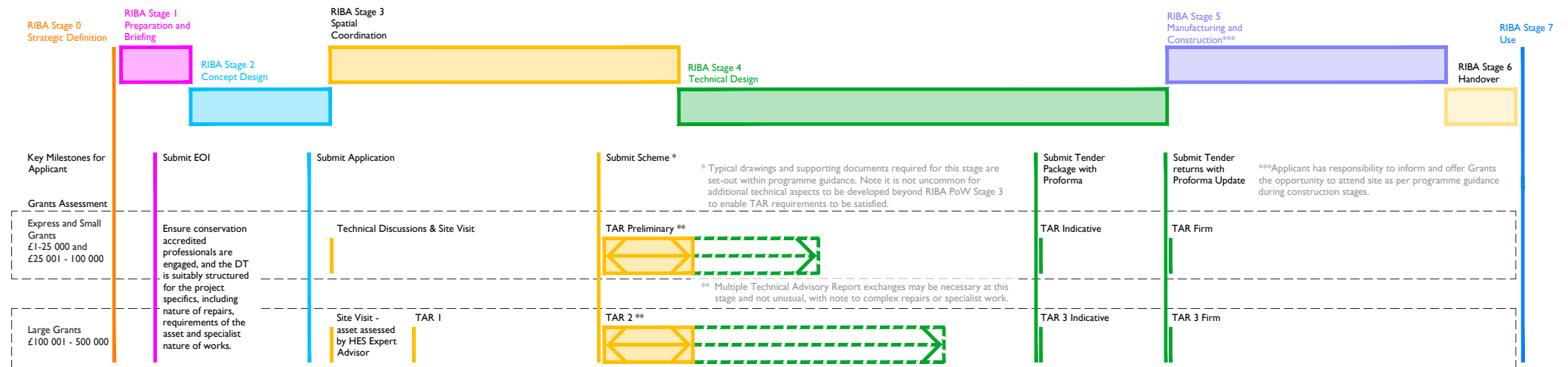
Overleaf, there is a typical timeline for our updated grant process for express and small grants for repair projects (up to £100k). The timeline illustrates key milestones and exchanges of information, either through site visits, technical discussions or TAR reports. For reference, the timelines of the RIBA Plan of



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Work (PoW) Stages process and the timeline for larger grant applications over £100k is included. If you are not familiar with the RIBA PoW Stages, it is a tool to help structure the design stages of your project which your professional advisor can explain more about:



There will now be no TAR1 report for successful applications requesting up to £100k of HES grant. Instead, there will be a site visit including a technical discussion between your professional team and our grants technical advisor. This increased discussion at the early stages has been prioritised over the existing more formal reporting to help allow timescales to be more flexible, advice to be delivered more efficiently, whilst still promoting the conservation principles set out within our Advisory Standards for Repair Grants. Following the initial site and technical discussion, and with reference to the Advisory Standards for Repair Grants, your professional team should have all that they need in order to prepare an appropriate scheme for submission to us.

The reduced need to produce TAR reports, increases the capacity of our grants technical advisor to discuss technical aspect of these smaller grant projects with the applicant and their professional team. The Advisory Standards for Repair Grants, as a key technical resource document for you and your professional team, should be your first point of reference when developing your project and should be used prior to contacting the grants team to discuss any technical matters or questions.

What stays the same?

The TAR process, accompanied by a site visit by the grants technical advisor, remains core to our assessment process. The proposed simplification only reduces the number of reports involved for successful applications for HES grant requests up to £100k. After the submission of your scheme, you will begin to receive TAR reports on a similar timetable to those for grants above £100k, now named slightly differently as, TAR Preliminary, TAR indicative and TAR firm.

How will it impact our grantees?

The proposed simplification for these processes for projects at the express and small grant levels seeks to make the programme more accessible to a wider range of applicants. Early discussions should help to demystify our process and make clear the standard required for grant aided work.



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