

LOANS

Application Form

This application form must be read in conjunction with:

Loans - Guide for Applicants

The completed form should be returned, together with all the supporting information required to:

The Architectural Heritage Fund
Alhambra House
27-31 Charing Cross Road
London WC2H 0AU
Tel: 020 7925 0199
Fax: 020 7930 0295
E-mail: ahf@ahfund.org.uk
website: www.ahfund.org.uk



April 2006

1. The Applicant

The person making the application must be a trustee or officer of the charity.

- 1.1 Name of the charity:.....
- 1.2 Charity registration number (or Inland Revenue Number):..... Date obtained:.....
- 1.3 Company registration number (if applicable):.....
- 1.4 Member of APT: **Yes/No**
- 1.5 Registered office address:.....
.....
..... Post code:.....
- 1.6 Name of person making application:.....
- 1.7 Position in charity:.....
- 1.8 Address (if other than 1.5 above):.....
.....
..... Post code:.....
Daytime tel. no.:..... Fax no.:..... E-mail:.....

Key to the building's condition: (see Question 2.14)

Very Bad: Not weatherproof: roofless, or roof severely damaged; windows broken. Structurally unstable: foundations shifting, walls bulging, joists rotten etc. Badly penetrated by wet/dry rot and/or rising damp; major fire damage; uninhabitable and wholly unmodernised.

Poor: Roof in poor repair. Fabric generally deteriorating (e.g. leaking roof, deteriorating masonry, all gutters badly defective, window frames decayed, pointing eroded). Partial fire damage; rot outbreaks; severely damp; unmodernised.

Fair: Structurally sound but in need of repair (e.g. some window frames decayed, gutters blocked, pointing partly eroded); needing rehabilitation to meet current standards.

Good: Structurally sound, weathertight and with no significant repairs needed (but at risk for other reasons).

2. The Project Building(s)

- 2.1 Name and address of property for which the loan is sought:.....
.....
.....
- 2.2 Date(s) built (approx):..... Post code:.....
- 2.3 List grade/category:..... Scheduled: **Yes/No** (Please enclose a copy of the statutory list entry)
- 2.4 Name of conservation area (if applicable):.....
- 2.5 Original use (if known):..... Current or last use:.....
- 2.6 Is the building occupied? (circle as appropriate) **Yes No Partly**
If No, how many years vacant? (approximately):.....
- 2.7 Is the building already in the applicants ownership? (circle as appropriate) **Yes/No**
- 2.8 If Yes, is it **Freehold/Leasehold**
- 2.9 If Leasehold, give length of lease and expiry date:.....
- 2.10 Cost and date of acquisition:.....

- 2.11 If the applicant does not already own the property, what is the current ownership? **Private/Local authority/Other**
- 2.12 Is the property on the market? **Yes/No** If Yes, for how long?..... Asking price:.....
- 2.13 Give brief details of plans to acquire the property and whether freehold or leasehold:.....

- 2.14 What is the building's condition? (see Key above before circling): **Very Bad Poor Fair Good**
 If "good", explain why the applicant has chosen this building:.....

- 2.15 Is the building on a Buildings at Risk Register? **Yes/No**
 If yes, please state name of Register(s):.....
- 2.16 Name and address of local authority planning department:.....

- 2.17 Is the local authority involved? **Yes/No**
 If Yes, in what way:.....
 If Yes, contact name:.....
 Tel:..... Fax:..... E-mail:.....

3. The Project

- 3.1 AHF Options Appraisal Grant received: **Yes/No** Date:..... Ref:.....
- 3.2 Brief description of work proposed:.....

- 3.3 Has planning/listed building consent already been obtained? **Yes/No**
- 3.4 Proposed date for starting work:.....
- 3.5 Estimated duration of the project:.....
- 3.6 **The architect:**..... **Accredited:** **Yes/No**
 Contact name:.....
 Address:.....

 Tel:..... Fax:..... E-mail:.....
- 3.7 **The quantity surveyor:**.....
 Contact name:.....
 Address:.....

 Tel:..... Fax:..... E-mail:.....

3.8 **The structural engineer:**.....
 Contact name:.....
 Address:.....

 Tel:..... Fax:..... E-mail:.....

3.9 **The valuation surveyor:**.....
 Contact name:.....
 Address:.....

 Tel:..... Fax:..... E-mail:.....

3.10 **Other relevant consultants** (landscape architects, services engineers, etc):.....

3.11 **Estimated gross costs of project** (see *Guide*, section 2.4)
 (Options appraisal, business plan, conservation plan £.....)

Acquisition	£.....
Acquisition fees and costs	£.....
Preliminaries	£.....
Other pre-project costs	£.....
Eligible building work	£.....
Ineligible work	£.....
External works/landscaping	£.....
Professional and other fees	£.....
Unrecoverable VAT	£.....
Insurance (see <i>Guide</i> , section 7)	£.....
Project management costs	£.....
Project-related overheads	£.....
Contingency (%)	£.....
Financing costs (AHF and other loan interest)	£.....
Other costs (please give details)	£.....
	£.....
Total expenditure	£.....

3.12 **Funding available:** (Please indicate whether firm or estimated and provide copies of any offer letters)

	Amount	Firm Offer	Likely/estimated
(Options Appraisal Funding (received)	£.....)		
English Heritage/Cadw/Historic Scotland/DoE(NI)	£.....	<input type="checkbox"/>	<input type="checkbox"/>
European Regional Development Funding (state Objective)	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Heritage Lottery Fund	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Townscape Heritage Initiative/HERS	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Regional Development Agency	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Local authority	£.....	<input type="checkbox"/>	<input type="checkbox"/>
AHF project grants (<i>not</i> loans or refundable grants)	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Other grants (please give details)	£.....	<input type="checkbox"/>	<input type="checkbox"/>
	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Donations/other fundraising	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Sale proceeds (Nett of disposal costs, fees and marketing costs)	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage or other long-term funding	£.....	<input type="checkbox"/>	<input type="checkbox"/>
Total income (estimate):	£.....		
Surplus/(deficit) on present figures:	£.....		

4. The Loan

4.1 Amount of loan applied for (see *Guide*, section 4): Acquisition £.....
 Other £.....

4.2 Working capital required for: **Acquisition/Repair/Conversion/Other** (circle all applicable)

4.3 Security offered (see *Guide*, section 5): **Repayment guarantee/First charge**

If a repayment guarantee, state name of proposed guarantor:

.....

If a first charge over the project property, please state:

current open market valuation £.....

estimated value when project is completed £.....

If a first charge over another property/properties

the current open market valuation(s) £.....

the address(es):

.....

4.4 Details of the applicant's solicitor:

Firm:.....

Contact name:

Address:.....

.....

Tel:..... Fax:..... E-mail:.....

5. Accompanying Material

Material which must be submitted with your application unless the AHF already has it

	Already Sent	Enclosed
5.1 Memorandum and Articles of Association or other governing document	<input type="checkbox"/>	<input type="checkbox"/>
5.2 List of trustees	<input type="checkbox"/>	<input type="checkbox"/>
5.3 Latest audited accounts and balance sheet, and recent management accounts if available or up-to-date certified financial statement	<input type="checkbox"/>	<input type="checkbox"/>
5.4 Brief description and history of the property	<input type="checkbox"/>	<input type="checkbox"/>
5.5 Copy of statutory list description (if listed or scheduled) or evidence that an unlisted building in a Conservation Area is of architectural or historic merit (letter from an amenity society or local authority, extract from a book, etc)	<input type="checkbox"/>	<input type="checkbox"/>
5.6 Location plan, showing nearest principal town and main road or street plan	<input type="checkbox"/>	<input type="checkbox"/>
5.7 Site plan	<input type="checkbox"/>	<input type="checkbox"/>
5.8 Brief summary of current condition of the building	<input type="checkbox"/>	<input type="checkbox"/>
5.9 Outline specification of work proposed	<input type="checkbox"/>	<input type="checkbox"/>
5.10 Architect's plans and elevations (existing and proposed)	<input type="checkbox"/>	<input type="checkbox"/>
5.11 Outline cash flow forecast for project	<input type="checkbox"/>	<input type="checkbox"/>
5.12 either full report on current open market and estimated resale value from a qualified valuer, acknowledging that the AHF is entitled to rely on it (see <i>Guide</i>) or proposed guarantor's indication of willingness to act	<input type="checkbox"/>	<input type="checkbox"/>
5.13 At least six high-quality digital images on disk (min 500 kb) or at least six good-quality prints (not photocopies) showing the building in its current state	<input type="checkbox"/>	<input type="checkbox"/>
5.14 Copy of the Minute recording the trustees resolution to take the project forward	<input type="checkbox"/>	<input type="checkbox"/>
5.15 Please list any other information included with this application:.....		

Material which must be submitted before the loan is contracted and should be sent now if possible.

	Already Sent	Enclosed	To Follow
5.16 Copies of planning and listed building consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.17 Information to support costs in 3.11 above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.18 Copies of offer letters to support 3.12 above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.19 Detailed cash flow forecast for project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.20 A summary of the detailed specification for the project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.21 Confirmation of a satisfactory tender price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I confirm that the project is within the charity's area of benefit (as defined in its governing document).

Signed:..... Position in charity:.....
(see *Guide* para 3.1)

Name in block capitals:..... Date:.....