

Heritage conservation practice note

Heritage Development Guideline 2.1 Model Brief for the Preparation of Conservation Plans

The first step in commissioning a conservation plan is to prepare a brief for prospective consultants, setting out exactly what you would like them to do. This guideline sets out a model brief for the preparation of a conservation plan for a place of cultural significance.

Model brief

Introduction

A conservation plan guides the care and development of a place of cultural significance based on an understanding of its significance. It acknowledges and helps manage the often competing expectations that different people have of a heritage place.

This brief sets out the requirements for the development of a conservation plan.

General guidelines

The conservation plan must set out:

- the best way of retaining or recovering the cultural significance of the place, making provisions for its security, maintenance and future
- all relevant material which contributes to an understanding of the significance of the place and to the development and implementation of the proposed policies
- clear guidelines for the conservation and development of the building which consider the requirements of the owner while respecting the integrity and significance of the building.

All aspects of the plan should be developed according to the Australia ICOMOS Charter for the Conservation of Places of Cultural Significance (The Burra Charter).

Stage 1

Description of the place

- the name and location of the place
- certificate of title references
- a brief history of the place

Documentary and physical evidence

This should include:

- a site examination - coordinated and arranged with owners, tenants or subtenants

- photographs - both archival and current to establish the historic development of the heritage place, as well as to document the condition of the heritage place internally and externally
- background information about the period and of similar places and uses.

Analysis of the documentary and physical evidence

Include details of:

- past development and use of the place
- changes to earlier finishes and decorative details and identification of structural alteration to the fabric
- the context of the changes.

Include only relevant information. Where possible use photos or drawings to show changes to the place. All graphic material should be captioned and sources given. Mention any missing relevant information.

Assessment of significance

Include:

- the nature of significance (such as associations links, aesthetic qualities, scale, form materials, textures, colour, space and the relationship between components and with the setting - streetscape)
- individual assessments of component parts or aspect
- the degree of significance and intactness of the whole and of parts. Range the individual components on a scale of values. Identify

contrasting, intrusive and disruptive elements.

Statement of significance

The statement of significance should provide a practical basis for the development of policies appropriate to the heritage place or its components. This statement should be succinct and easily understood.

Stage 2

Conservation policy

The conservation policy, based on the statement of significance, should cover the following:

Requirements to retain significance:

- identify opportunities to enhance the cultural significance of the place
- state the requirements and constraints relevant to caring for the heritage place and retaining its cultural significance.

Physical condition:

- provide a schedule of condition illustrated by drawings or photos. Problem areas should be clearly marked on elevation drawings
- identify how security and regular maintenance will be provided
- devise a routine maintenance schedule incorporating the use of a log book.

Owners' requirements and feasible uses:

- set out the owners' expectations in relation to the place, requirements and resources (short and long-term). Resources can include management skills as well as financial capacity
- identify uses which are compatible or incompatible. Identify constraints on feasible compatible uses.

External requirements:

- identify statutory requirements (heritage listings and their implications - building regulations, fire, health, etc)

The conservation policy should also:

- identify the mechanism by which policy decision are to be made and recorded
- suggest a management structure through which the conservation policy may be implemented
- identify those responsible for conservation and management decisions and for the day-to-day management of the place
- provide guidelines regarding unavoidable intervention and the degree of intervention acceptable for non-conservation purposes.

Policy recommendations

Recommendations should be made on the basis of conservation policy statements. These might include:

- schedule of conservation work to specific parts of the place (e.g.. shopfront design, verandah) and indicative costings
- guidelines on signage or adverting - location and type of signage and/or advertising, size, fixings, what to avoid, how it relates to the character of the street
- proposed external colour schemes (derived from scrapes of the original paint and documentary evidence)
- guidelines on how to accommodate new services
- how changes required by the owner will be accommodated
- schedule of condition and maintenance program
- estimate of costs of proposed conservation works.

Identify how policies will be adopted and reviewed. State how implementing a conservation policy will:

- change the place
- affect its significance
- affect the streetscape and its amenity
- affect the owners and users.

Strategy

- Devise a strategy setting out the details of how and when conservation policies will be implemented. It should include:
 - the financial resources to be used (government, municipal and/or private)
 - the technical and other staff required
 - the sequence (priority of conservation)
 - the timing of the conservation

- the management structure.

Establish a schedule of intervention priority according to the significance and level of decay or threat of identified areas.

The report

The report should include:

- the statement of significance
- the development of conservation policy and recommendations
- the strategy for implementing the conservation policy
- names of clients
- authorship of the report
- date
- outline of the brief
- constraints
- names of practitioners engaged in the study, the work they did and any separate reports they prepared
- sources
- relevant graphic material
- provisions for the formal adoption and review of the conservation policy
- copies of original archival material.

Other details to be specified in the brief

The brief should also set out:

- the report standards - format, photographs, paper and binding
- the number of draft and final reports to be produced
- the timetable for completion of the plan

- the framework for regular communication between the consultant and the client
- the agreed payment schedule
- who owns copyright of the completed Conservation Plan report and the conditions under which the report may be published or distributed by the owners, the consultant and others.

References

Kerr JS 1982, *The conservation plan: a guide to the preparation of conservation plans for places of European cultural significance*. The National Trust of Australia (NSW).

M Walker & P Marquis-Kyle, *The illustrated Burra Charter: good practice for heritage places*, Australia ICOMOS Inc., Burwood, 2004.

Conservation Management Plans Model Brief Heritage Lottery Fund
http://www.icomos.org/~fleblanc/documents/management/doc_ConservationManagementPlans-Guide.pdf.

Conservation Plan Study Brief - Introduction to Conservation Plans, The Heritage Council of WA, 2002
http://www.heritage.wa.gov.au/assets/files/General_Publications/conservationBrief0210.pdf.

Note

This Guideline is a revised version of the 1991 Heritage Development Guideline 2.1 Model Brief for the Preparation of Conservation Plans. It is available online only.



