



NSW GOVERNMENT
Department of Planning



Heritage Office

NSW Heritage Grants Local Government Heritage Management Program

Template for Heritage Strategy Annual Report 2008-2009

Background

A requirement of the local government heritage advisor funding program is that each Council must prepare, adopt and implement a three year Heritage Strategy for 2008/9 to 2010-11. This strategy must be based on the Heritage Office publication, '*Recommendations for local council heritage management*'.

Local government heritage advisor annual reporting requirements for 2008-9

The Heritage Office requires a report on the implementation of the Council's Heritage Strategy to be prepared by council's heritage advisor and council's heritage officer. This will replace the annual report from heritage advisors.

Reporting on the heritage strategy incorporates all of the areas formerly covered by the heritage advisor's annual report.

A new outcome, outcome 9 has been added to this template. This outcome measures heritage and sustainable development initiatives in your local area.

All Councils to use the Heritage Strategy Annual Report template

The 2008-9 heritage strategy annual report template outcomes and indicators included in the report template are based on a standardised heritage strategy document based on the '*Recommendations for local council heritage management*' publication available on the Heritage Office website at www.heritage.nsw.gov.au and search the publications.

Please use the template below to prepare an annual report to summarise your council's achievements throughout the year. It is suggested that you complete this template electronically by inserting your responses as follows:

1. Fill in the key performance indicator data in the boxes as indicated for each heritage strategy suggestion.
2. Using this data, complete all four evaluation questions for each outcome.

Please do not change or amend the template. You are welcome to add as much qualitative information in the evaluation section about your council as needed.

The Heritage Office will collect and aggregate this data for use in its annual report on the local government heritage management program across NSW, as funded through this program.

Lodging your heritage strategy annual report

As per the heritage advisor agreement, a copy of this annual report must be:

1. Lodged with your council for adoption.
 2. Lodged with the Heritage Office along with claims for payment by 30 May each financial year.
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Recommendation 1

Establish a heritage committee to deal with heritage matters in your area

Outcome 1 (Caring for our heritage)

Increased community participation, awareness and appreciation of heritage in the local area

Key Performance Indicators

Please complete this section

Heritage committee established	Yes / No
Heritage committee constituted under S377 of Local Government Act	Yes / No
Heritage policy written and adopted by Council	Yes / No Date completed Date reviewed and updated
Heritage committee advice/input to council decision making	# of pieces of advice/input to Council decision making
Local heritage consultants directory established	Yes / No
Local services and suppliers directory established	Yes / No

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
-

Recommendation 2

Identify the heritage items in your area and list them in your local environmental plan.

Outcome 2 (Knowing and valuing our heritage)

Increased knowledge and proactive management of heritage in your local area

Key Performance Indicators

Please complete this section

Community based heritage study completed	Yes / No Date completed Date reviewed and updated # of heritage items recommended for inclusion in LEP heritage schedule
Aboriginal heritage study completed	Yes / No Date completed Date reviewed and updated
No. of heritage items included in existing LEP heritage schedule	# of heritage items included in LEP heritage schedule Date completed Date reviewed and updated
Council has gazetted a principal LEP with model heritage provisions in accordance with Standard Instrument (LEPs) Order	Yes / No Date gazetted
Statement of significance for all heritage items in existing LEP	Yes / No Date completed Date reviewed and updated

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
-

Recommendation 3

Appoint a heritage and urban design advisor to assist the council, the community and owners of listed heritage items.

Outcome 3 (Caring for our heritage)

Increased community participation and proactive heritage and urban design management in your local area

Key Performance Indicators

Please complete this section

Site visits	# of heritage site visits undertaken
Heritage/urban design advice given	# of heritage/urban design advice given
Pre DA advice given on heritage/urban design issues	# of pre DA advice given on heritage/urban design issues
Advice to Council DAs provided on heritage/urban design projects	# of advice to Council DAs provided on heritage/urban design projects

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
-

Recommendation 4

Manage local heritage in a positive manner

Outcome 4 (Caring for our heritage)

Proactive heritage and urban design management in your local area

Key Performance Indicators

Please complete this section

Heritage DCP	Yes / No Date completed Date reviewed and updated
Urban design DCP	Yes / No Date completed Date reviewed and updated
Waive or reduce DA fees	Yes / No
Adopt a flexible approach to planning and building requirements	Yes / No

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
-

Recommendation 5

Introduce a local heritage incentives fund to provide small grants to encourage local heritage projects

Outcome 5 (Caring for our heritage)

Increased community participation and proactive conservation and management of heritage in your local area

Key Performance Indicators

Please complete this section

Local heritage fund operational	Yes / No
Heritage projects funded with this years funding	# of heritage projects funded this financial year
Total project value	Total \$ project value
Total local heritage fund contribution	Total \$ contributed by local heritage fund
Total owner contribution to project	Total \$ contributed by local heritage owner to heritage project
Heritage projects that contribute to local tourism	# of heritage projects that contribute to local tourism
Projects created paid employment	# of jobs created
Projects created volunteer opportunities	# of volunteer hours contributed

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
-

Recommendation 6

Run a heritage main street program

Outcome 6 (Caring for our heritage)

Council, owners and the community actively participate in attractive and well managed heritage main streets

Key Performance Indicators

Please complete this section

Heritage main street committee operational	Yes / No
Heritage main street study completed	Yes / No Date completed Date reviewed and updated
Heritage main street study recommendations implemented	Yes / No Date completed
Heritage main street program expanded to other main streets in LGA	Yes / No

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
-

Recommendation 7

Present educational and promotional programs

Outcome 7 (Valuing our heritage)

Increased awareness and appreciation of heritage by the Council, owners and the community in your local area

Key Performance Indicators

Please complete this section

Heritage information available for LGA (eg brochures, website, guidelines etc)	Yes / No Date completed Date reviewed and updated
Heritage promotional events held (eg National Trust Heritage festival, local heritage festivals, heritage awards scheme, main street festivals etc)	# of heritage events held in last financial year
Local/regional heritage tourism strategy completed	Yes / No Date completed Date reviewed and updated
Heritage trail completed	Yes / No Date completed Date reviewed and updated
Heritage training for staff	Yes / No # staff attended training
Heritage training for Councillors	Yes / No # Councillors attended training
Heritage training/workshops for heritage owners	Yes / No # of owners attended training
Heritage training /workshops for local professionals	Yes / No # of local professionals attended training

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
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Recommendation 8

Set a good example to the community by properly managing places owned or operated by the council

Outcome 8 (Caring for our heritage)

Council proactively conserves and manages its heritage assets

Key Performance Indicators

Please complete this section

Council has a asset management plans with action plans for heritage assets	Yes / No
CMPs/CMS prepared for state significant heritage assets	# of CMPs/CMS prepared for state significant items this financial year
Annual works budget secured for heritage asset maintenance and repairs	Yes / No

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
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Recommendation 9

Promote sustainable development as a tool for heritage conservation

Outcome 9 (Caring for our heritage)

Proactive heritage and sustainable development in your local area

Key Performance Indicators

Please complete this section

Heritage Development Application approvals for adaptive reuse works	# of adaptive reuse DA approvals
Development Application approvals for regeneration and urban design works	# of urban design /regeneration DA approvals
Heritage Development application approvals for infill and/or additions works	# of infill/additions DA approvals
Pre- DA advice and advice given on sustainable and energy efficient modifications (power, water, waste, carbon neutral)	# of pre-DA advice and advice given on sustainable and energy efficient modifications
Sustainability and heritage awareness courses for councillors, council staff, heritage owners and community	Yes / No # of people who attended training

Evaluation: (social, environmental, economic)

Please add your commentary after each question

1. What do the KPIs tell you about this outcome?
 2. What were the key results or achievements for this year?
 3. Were there any challenges or disappointments that had a major effect on your results?
Briefly describe and show what action has been taken to address this.
 4. What will you do next year?
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