

**A Suggested Table of Contents
For a Conservation Management Plan
That can be Endorsed by the NSW Heritage Council**

TITLE

Keywords should clearly identify the subject place; use the proper or recognized name of the place or object; overall title should be concise; the title page should clearly state the date and, if relevant, the version number, of the document.

Table of Contents

1. Executive Summary

2. Introduction

2.1 Outline of tasks required to be undertaken in brief

2.2 Definition of the study area/item

clearly identify the name and boundaries of the area/item being studied; include current street address and name of local government area; also state property identifiers (lot/DP or Vol./Folio or Bk/No. or Parish/Portion) and current owners; clearly define the locations referred to in the document by the terms 'local' and 'State' and any other locational terms.

2.3 Methodology

note guidelines and publications that have informed the process, e.g. *NSW Heritage Manual*, *Illustrated Burra Charter*, *The Conservation Plan*.

2.4 Limitations

Any limitations should be noted here (e.g. what has not been covered in the plan but could otherwise reasonably be expected to be covered).

2.5 Identification of authors

identify names of individual authors and their professions, not just name of consultancy firm.

2.6 Acknowledgments

identify any persons or organisations that you may wish to acknowledge for their assistance in preparing the plan.

NOTE: A location plan and a site plan (with boundaries of the site clearly marked) must be included in this section.

3. Documentary Evidence

3.1 Thematic History

This must be a comprehensive investigation and analysis of the historical development of the item and its contexts. The NSW historical themes should be used. Any relevant local or sub-themes should also be used. The history should be written in a thematic format, and should identify comparable items/areas in each thematic phase.

A chronology of notable events associated with the item/area may be included, but must not be used as a substitute for a thematic history.

Historical illustrations, maps, plans etc. must be adequately referenced.

All documentary and oral sources must be adequately referenced.

'Adequately referenced' means identifying the repository and the document identifier.

3.2 Ability to Demonstrate

The surviving physical fabric (including movables, relics, landscapes, plantings, etc) that demonstrates each thematic phase should be identified.

It is recommended that a qualified historian with experience in the heritage field be engaged to undertake the historical research, writing and analysis.

4. Physical Evidence

4.1 Identification of Existing Fabric

There must be a comprehensive investigation and identification of the existing fabric of the item/area. The materials must be clearly identified, and should include exteriors and interiors.

Contents/movables should be identified.

Floor plans or diagrams should be included, and any elevations that may be relevant.

Landscapes/gardens/plantings should be identified.

Views to and from the place should be identified and shown on a diagram.

Any actual/potential archaeological relics or deposits must be identified and shown on a diagram.

Any other elements of the fabric of the item/area should be identified.

The method of investigation should be briefly described (e.g. non-intrusive observation)

It can be useful to present the fabric description as a table or as an annotated diagram(s).

4.2 Analysis of Existing Fabric

The identified fabric must be analysed: time periods (actual or approximate) should be allocated to the fabric elements; any unusual or representative fabric elements should be noted; comparable examples of similar fabric should be noted; repairs to earlier/original fabric should be noted; stylistic descriptions of fabric should be noted, especially of the overall arrangement or composition of the fabric (e.g. 'Inter-war Spanish Mission'), comparable examples of similar materials, techniques or styles should be noted; and an assessment of any archaeological deposits must be included.

If the item is of vernacular construction, some discussion of local vernacular techniques and materials can be helpful in assessing the item.

It can be useful to summarise the fabric analysis in a tabular form.

The various elements of the fabric should be ranked in a hierarchy of significance.

It is recommended that a qualified architect and a qualified archaeologist with experience in the heritage field be engaged for this section.

NOTE: the documentary and physical evidence sections can be integrated into a single section provided that each type of evidence clearly informs the other. However this should only be attempted if the team includes the necessary skills to undertake such an integrative approach.

5. Assessment of Cultural Significance

5.1 Comparative Analysis

Comparative places, identified in the documentary and physical evidence sections, should be compared with the subject item/area, and assessed to allow conclusions to be reached on comparative significance.

An identification of a level of significance (State or local) for the item/area should be clearly made.

5.2 Definition of Curtilage

A short discussion of the matters raised in sections 3 and 4 that relate to defining the curtilage should be included.

A diagram showing the curtilage boundary clearly marked must be included. The curtilage should be distinguished from the setting. For an SHR item, the curtilage should be contiguous with the SHR listing boundary – if an existing listing boundary is to be varied, this should be discussed and justified.

5.3 Statement of Significance

A concise Statement of Significance must be included. The statement should not be too long, and should clearly state why the item/area is of cultural significance, and what the degree and level of that significance is.

A series of sub-statements that address each of the seven State Heritage Register criteria (gazetted on 23rd April 1999) may follow from the concise statement addressing each relevant criterion in greater detail.

A series of sub-statements may follow from this stating the significance of various elements of the item/area.

If the item/area is a complex site, the significance of the place as a whole should be assessed as well as the significance of its constituent elements.

It is strongly recommended that all professional members of the study team take part in preparing the Statement of Significance.

6. Constraints and Opportunities

6.1 Statement of Significance

State here any constraints or opportunities that arise from the Statement of Significance – it can be useful to relate these to *Burra Charter* articles.

6.2 Statutory and non-statutory listings

Identify all the statutory and non-statutory listings (if any) that apply to the item/area, and provide a concise description of the constraints and opportunities that arising from the listing(s).

6.3 Other

Identify any other constraints and/or opportunities that apply to the item/area – in particular owners requirements, proposed continuing uses or new uses.

7. Development of Conservation Policy

generally, this section should explain and demonstrate how the various constraints and opportunities interact with the statement of significance, and how these in turn influence the policy approach to be taken.

policies/guidelines may canvas a range of conservation options, but these options should be ranked from most desirable to least – this hierarchy or ranking should be explained.

8. Conservation Policies and Guidelines

The policies must be clearly derived from sections 5, 6 and 7.

8.1 Definitions

Set out the definitions used in the *Burra Charter* (conservation, adaptation, ...etc.) and any other conservation terms that may be used in the policies.

8.2 Policies

Policies or guidelines should be concise, clear and unambiguous, and should focus upon significant fabric - all fabric identified in the fabric survey as being significant should have corresponding policies/guidelines.

Policies for the treatment of fabric should be clearly related to the significance of that fabric.

Policies or guidelines should also cover movables, curtilage issues, recording, views, uses and any other significant matters associated with the fabric and functions of the place.

Exemptions from section 57(1) of the Heritage Act arising from the conservation policies should be clearly identified.

There must be a policy covering reviews of the document.

There must be a policy regarding public accessibility of the document.

There must be a policy/guideline covering interpretation of the item/area.

Policy and guidelines for the site as a whole, as well as for each of the identified significant elements, should be included in this section – this might take the form of inventory sheets, for example.

Policies about additional listings, removal from lists, or amendments to listings can be included.

9. Appendices

include a copy of the *Burra Charter*, a copy of the brief, and a glossary of specialised terms if necessary. Any other appendices should only be included if they are clearly related to the content of the document.

General Comments.

- Remember who will be using the document - mainly planners, administrators, architects, historians, archaeologists and heritage practitioners – an audience of regulators and owners in the first instance; later the general community.
- Work from an assumption that the reader knows little or nothing of the item.
- Aim for brevity, clarity and simplicity in writing style and illustrations - overly long documents containing superfluous text, unnecessary appendices, crowded diagrams and illustrations that are difficult to read, interpret or understand should be avoided.
- The text in diagrams/maps should be large enough to read easily, but not so large that it obscures the diagram/map.
- Avoid jargon and arcane technical terminologies, or if they are necessary, include a glossary as an appendix to explain such terms. Plain English is always better.
- Try to keep the entire document in an A4 size format: fold-out A3 pages, pockets, detached inserts, and separate volumes should be avoided unless absolutely necessary.
- Keep section or paragraph numbering consistent, and try to avoid more than four levels of numbering (e.g. 3.2.1.1).

The *Style Manual for Authors, Editors and Printers*, AusInfo, Canberra, is the authoritative guide to standards and styles in written and published works in Australia, and is generally recommended for use.

It is important to remember that all Conservation Management Plans submitted to the Heritage Council for its endorsement will be subject to a rigorous process of review. Endorsement cannot be guaranteed, and will depend upon the quality and merits of the submitted document.

It is suggested that you submit a draft to the NSW Heritage Office for comment before submitting a final copy for endorsement by the Heritage Council of NSW.

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