

HERITAGE INFORMATION SERIES

COMMUNITY-BASED HERITAGE STUDIES: A GUIDE



NSW GOVERNMENT
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WHAT IS A LOCAL GOVERNMENT AREA HERITAGE STUDY?

A heritage study investigates the history of a local government area, identifies, and then assesses, items and places of heritage significance that demonstrate this history. The study explains why the items are significant and recommends ways to manage and conserve this significance.

A heritage study contains:

- a history of the area using the NSW historic themes;
- research and field work that describe the identified heritage items and a condition survey for each heritage item identified during the study;
- summary inventory sheets for each significant heritage item, including a heritage assessment and statement of significance;
- study-wide and specific heritage item management and promotional recommendations.

A heritage study provides information to support:

- the community's sense of identity – including its beginnings, the present and its potential. It can also be used to welcome new residents to the local community;
- future management of heritage items;
- education programs to raise awareness about the community's heritage assets, for better understanding and appreciation;
- community engagement and sense of ownership of its heritage assets;
- heritage tourism strategies that can generate business in the local area, and target a range of special heritage places that council can support and promote to visitors;
- the council's cultural plan.

A cultural plan provides a framework for a council to manage its cultural built assets, cultural organisations and other cultural resources within the community.

Further information is available on Arts NSW website: www.arts.nsw.gov.au
For examples of completed plans look at www.lgsa.org.au and go to 'Cultural Policies and Plans in Local Government'.

WHAT IS A COMMUNITY-BASED HERITAGE STUDY?

A major premise of the community-based approach is that it provides an affordable means for communities to make a valuable contribution to the heritage study, with appropriate guidance from a heritage consultant.

Members of the community work alongside the consultant for the duration of the project, undertaking research, nominating items and considering

recommendations for the future management and promotion of their local heritage items.

Unlike other heritage study methodologies, ongoing community involvement gives an opportunity for the community to understand heritage management and council processes and to take substantial ownership of the study and its findings. This can reduce the likelihood of community conflict when the study's list of heritage items is recommended for adoption by council for inclusion in its local environmental plan (LEP).

WHY COUNCILS SHOULD UNDERTAKE A HERITAGE STUDY

There are many reasons why a council should undertake or update its heritage study:

- all communities expect that their local council will identify, respect and protect their local heritage;
- all councils in New South Wales have a statutory responsibility to manage the heritage of their areas. *The Environmental Planning and Assessment Act 1979* requires councils to protect heritage through local environmental plans. These plans outline requirements for the management of local heritage and a list of heritage items;
- councils have a responsibility to develop and maintain community pride and well-being. Heritage is one of the components that enables communities to retain their physical links with the past;
- heritage also has the potential to underpin the council's tourism initiatives;
- all of the study information is collected and presented in a form that can be readily displayed on the council's website.

The Heritage Office publication: *Suggestions on How Local Councils Can Promote Heritage Conservation* encourages local council to prepare a community based heritage study or update existing studies. It can be downloaded from the website www.heritage.nsw.gov.au/publications.

FUNDING FOR A COMMUNITY-BASED HERITAGE STUDY

The Heritage Office provides dollar-for-dollar funding through its Heritage Incentives Program to assist rural councils in the preparation of a community-based heritage study. Funding is provided for completion of the project within two years of approval. For more information please refer to www.heritage.nsw.gov.au/funding.

SUMMARY OF PROCESS

This is a summary of the steps recommended to prepare a community-based heritage study. In certain projects, it may be appropriate to change, delete or add steps to the process.

- Step 1 Council contacts the Heritage Office to organise funding.
- Step 2 Council defines the project scope, finalises the consultant's project brief for a project manager and historian, advertises and engages consultants.
- Step 3 Project manager and historian contact the Heritage Office for project briefing and Heritage Database training.
- Step 4 Council notifies the community about the heritage study and advertises for volunteers to join the heritage study working group.
- Step 5 The project manager and heritage working group prepare a list of local historical sources for the thematic local history.
- Step 6 The professional historian engaged for this project prepares the draft thematic local history.
- Step 7 The project manager and heritage working group compile a list of known heritage items from existing registers and lists.
- Step 8 The project manager uses the draft thematic local history to create a list of known heritage items and looks for obvious gaps to follow up.
- Step 9 The council advertises and invites the community to nominate heritage items, and to provide further information on known gaps and known heritage items.
- Step 10 The council, project manager and heritage working group approach all potential heritage item owners and set up site visits to collect information for all nominated heritage items.
- Step 11 The historian uses community input to revise the draft thematic local history and provides advice on local histories for individual heritage items prepared by the project manager and heritage working group.
- Step 12 The project manager works with the heritage working group to complete significance assessments, prepare statements of significance and complete heritage data forms for individual heritage items.

- Step13 The project manager, historian and heritage working group finalise the draft heritage study (including the thematic local history, the list of recommended individual heritage items and management recommendations).
- Step 14 Council officer sends a copy of the draft heritage study, heritage database and invoices to the Heritage Office for payment.
- Step 15 Council officer and the project manager consult with individual owners of recommended heritage items about the draft report and management recommendations prepared for their property.
- Step 16 Council officers and council management review the draft heritage study, management recommendations and heritage items.
- Step 17 Council officers present the draft heritage study with a covering report to the councillors.
- Step 18 Following councillor approval of the draft heritage study, council officers notify heritage item owners and the wider community about the heritage study and undertake a public exhibition and consultation process.
- Step 19 Council officers send the final heritage study and heritage database to the Heritage Office and claim all remaining project funding.
- Step 20 Council adopts the study and commences implementation, including listings on the schedule to the local environmental plan, promotion and incentives.

A STEP-BY-STEP GUIDE

Step 1 Council contacts the Heritage Office to organise funding.

Council applies to the Heritage Office for funding and receives approval for the project funding. Project funding is set aside for two years for this project. Council must aim to complete the project within this time frame.

Step 2 Council defines the project scope, finalises the consultant's project brief for a project manager and historian, advertises and engages consultants.

Council, in consultation with the Heritage Office, uses the following points to engage a project manager and historian with the necessary skills to manage the project and work with the local community to identify and assess its heritage.

1. Council determines the project scope. While all studies should aim to include all aspects of heritage - built, natural, movable and Aboriginal sites - the history of the local area may suggest that some of these aspects should be favoured over others. This needs to be discussed and agreed, and then defined in the consultant's project brief. In particular, there may be a need for a separate study of Aboriginal heritage. Separate funding is available through the Heritage Office for this project.
2. Is there an existing professionally prepared history of the local government area which can be used for this study? If not, a professionally produced thematic history is a fundamental pre-requisite for a successful heritage study and a historian will need to be engaged as part of the consultant team for this project.
3. Council then advertises the formal consultant's brief, based on the standard brief in Appendix A, to engage a project manager and historian.
4. Council follows standard local government tendering processes. Available heritage consultants working in your region can be found in the Conservation Section of the Heritage Office website www.heritage.nsw.gov.au. Consult the Heritage Consultants Directory and search under 'heritage advice, studies and management'. Check for consultants who include previous experience in local government heritage studies in their summary.
5. Council reviews applications and interviews preferred tenderers.
6. Council puts together list of preferred heritage consultants and contacts the Heritage Office with recommendation for approval.
7. Heritage Office approves selected heritage consultant/s and notifies Council.
8. Council sends out letter of offer to selected tenderer based on Appendix D.

<p>The essential skills and roles of the project manager and historian are outlined in the consultant project brief, along with consultant terms of engagement and an example of a heritage study contents page in Appendix C.</p>
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Step 3 Project manager and historian contact the Heritage Office for project briefing and SHI training

The project manager must contact the Heritage Office for a project briefing to:

- outline project expectations and to answer any queries;
- attend a Heritage Database training day, and
- attain a copy of the Heritage Database software (also refer to Appendix E),

The professional historian must contact the Heritage Office for a project briefing to:

- outline project expectations and to answer any queries; and
- discuss the preparation of the thematic history.

Step 4 Council notifies the community about the heritage study and advertises for volunteers to join the heritage study working group.

The heritage working group will be involved in preparing the inventory and suggesting appropriate implementation strategies for the heritage study.

The project manager will call together interested people in the local government area, including individuals, organisations and council representatives to:

- discuss what a community based heritage study is and what it will set out to achieve;
- discuss the step-by-step process for the study;
- present a prepared project plan;
- outline what the working group will need to do and the various project tasks.

A standard advertisement template is included in Appendix F. Interested people can be found by a general advertisement and also by targeted recruitment.

[NB: a heritage working group or group authorised by the council has the advantage of council insurance cover]

Depending on the scope of the study, it is suggested that the following organisations are represented on the heritage working group:

- the local Aboriginal land council, Elders & relevant Aboriginal community groups/organisations;
- interested and knowledgeable councillors and council officers;
- the local historical society;
- the local library/archives;
- local museum curators;
- local nature conservation group or a person knowledgeable in this area;

- a person knowledgeable about the rural history of the area;
- representatives from the key ethnic communities in the area.

It is crucial that a local councillor be included in the heritage working group, as:

1. the councillor will be the direct link to the council and must regularly update all councillors on the progress of the study;
2. keeping the councillors informed throughout the study is especially important as this will smooth the way for adoption of the completed study and recommendations to the full council.

Step 5 The project manager and heritage working group prepare a list of local historical sources for the thematic history.

The project manager and heritage working group prepare a list of known local historical materials (documents and physical sites) that can be used by the professional historian for the thematic history.

Involving the heritage working group in the historical research will add to the store of knowledge needed for the history.

Research of documents and other secondary sources as well as field work and site surveys are needed to underpin the thematic history, as it will form the basis for the identification of the potential heritage items. Heritage items provide the physical evidence of historical events and processes in the local area.

Important documentary information sources include:

- the local historical society,
- the local library and archives,
- the Royal Australian Historical Society (RAHS) which has the largest publicly accessible local history library in New South Wales, and
- the State Library of NSW, including the Mitchell Library.

Step 6 The professional historian engaged for this project prepares the draft thematic local history.

The professional historian will have discussed the project generally and any specifics with the historian at the Heritage Office.

Relevant and useful publications include:

- the NSW Heritage Office's *Investigating Heritage Significance* which canvasses why you need to have an appropriate history context for any heritage study. It also sets out the 35 historic themes for NSW;
- the NSW Heritage Office's *Regional Histories* book for NSW which sets out the themes and broad history for each of the 16 regions of NSW;
- the NSW Heritage Office's *Historical Research for Heritage* which contains a useful guide to historical sources as well as advice on how to research the history of place;

An example of relevant historical themes for a local area might include:

National theme	State theme	Local theme
Peopling Australia	Indigenous cultures	Aboriginal landscapes and settlement patterns
Developing local, regional and national economies	Exploration	Incorporation of the area into the colonial state
Developing local, regional and national economies	Environment	Utilising and conserving natural resources
Building settlements, towns and cities	Towns, suburbs and villages	Living and working in towns and villages
Developing local, regional and national economies	Agriculture	Mechanisation and local resource management
Building settlements, towns and cities	Utilities	Developing public services and utilities
Developing local, regional and national economies	Communication	Communicating within and beyond the local area
Developing Australia's cultural life	Cultural sites	Creating cultural, religious and educational facilities
Governing	Defence	Contributing to the nations defence

Step 7 The project manager and heritage working group compile a list of known heritage items from existing registers and lists.

To save time, this step can be completed at the same time as the preparation of the thematic local history, as information collected from Steps 5 and 6 will inform Step 7 and vice versa. The historian can assist with the step if requested by the project manager and heritage working group.

The easiest way to start an inventory of heritage items in your local government area is to bring together all known heritage registers and lists. At this stage, the accuracy, level of detail or repetition of information from list to list will not affect the process. The aim is to compile a comprehensive check list. Additions and corrections to information can be made at a later date.

Use the Heritage Database software supplied by the Heritage Office that contains all known local heritage items in your local government area to input new information using the material collected. This step must be followed.

Important note on collecting information on items for the NSW Heritage Database

To ensure consistency and to avoid duplication of effort, it is recommended that all data on heritage items be recorded on the Heritage Database software supplied by the Heritage Office.

Follow these five steps to quickly build up the inventory:

1. Check the accuracy of the supplied NSW Heritage Database entries against the following lists:
 - council's own local environmental plans;
 - any regional environmental plans covered by the local government area;
 - Register of the National Estate
 - heritage and conservation registers compiled by state government agencies;
 - National Trust Register;
 - Engineers Australia Heritage Committee (note also the committee's helpful 15-page brochure available on the Heritage Office website at www.heritage.nsw.gov.au/publications;
 - The National Parks and Wildlife Service in respect of any national park, reserve or historic site or Aboriginal sites;
 - Professional Historians' Association in respect of historic places and objects;
 - Royal Australian Institute of Architects in respect of 20th century items of built heritage;
 - the Art Deco Society in respect of between-the-wars items; and
 - main street studies commissioned by the local council.
2. Obtain a list of all property files for your local government area from the Heritage Office. This list will include a general local government area file covering sites added since 1978, and separate files on important sites or sites provided with funding since 1978.
3. Check any other source suggested by the working group or other community members, including your local library and local historical society

4. Note that council's own records can provide much of the information required to complete your database, including the legal description of the property, correct address and name of the current owners.

Add all new information and items to the Heritage Database software as you go.

Step 8 The project manager uses the draft thematic local history to create a list of known heritage items and looks for obvious gaps to follow up.

For example, if the thematic history notes that river shipping and gold mining were important in your local area, check to ensure that the potential heritage item list includes evidence of these two activities. The historian can assist the project manager with this step if requested.

Step 9 The council advertises and invites the community to nominate heritage items, and to provide further information on known gaps and known heritage items.

The Council officers assist the project manager and heritage working group in preparing and placing advertisements. Use the template advertisement included in Appendix F.

The project manager and heritage working group follow up local contacts for new heritage items and additional information.

Step 10 The council, project manager and heritage working group approach all potential heritage item owners and set up site visits to collect information for all nominated heritage items

1. Council sends a letter and information brochure (Appendices F and G) to all the owners or occupiers of each potential heritage item to:
 - explain the purpose and benefits of heritage listing;
 - seek additional information;
 - discuss any issues owners may have with the study process; and
 - request a site visit.
2. The heritage working group and project manager arrange site visits to look over nominated heritage items and discuss with owners the following:
 - photographic recording of the site and heritage item/s using digital photography;
 - site plan preparation for places with more than one heritage item, e.g. farming complexes;
 - GPS recording of the site which can be later checked against the council's own GPS records (if available);

- agreement on items to be included in the heritage listing e.g. the house, garden and front fence of a church, church hall, presbytery, lichgate and grounds within the legal property boundary;
- agreement on an appropriate curtilage for the selected items. Where the recommended curtilage for the heritage listings is not the same as the legal boundary of the property, e.g. in the case of a homestead and associated outbuilding, describe each of the buildings and then provide an appropriate curtilage. It could be a minimum outward distance from each of the buildings or a radial distance from the main homestead that includes all outbuildings.

Step 11 The historian uses community input to revise the draft thematic local history and provides advice on local histories for individual heritage items prepared by the project manager and heritage working group.

Step 12 The project manager works with the heritage working group to complete significance assessments, prepare statements of significance and complete heritage data forms for individual heritage items.

Use this opportunity to record additional historical information on the Heritage Database software provided by the Heritage Office.

Every heritage item entered in the Heritage Database MUST contain at least the following information:

1. item name
2. address
3. lot and DP
4. item type/group/category
5. national/state historic theme
6. statement of significance
7. level of significance (state or local)
8. historical notes
9. physical description
10. designer (if known)
11. builder (if known)
12. construction year started/completed
13. digital photograph
14. site plan for complex sites showing identified items

The project manager works with the heritage working group to:

1. determine the appropriate significance level for individual heritage items;
2. assess the significance for each item;
3. prepare a statement of significance for each item.

Most heritage items will be of local significance, however the study provides an excellent and methodical way to also assess heritage items of state heritage significance.

Heritage items of state significance identified through the study process should, at a later date, also be nominated for inclusion on the State Heritage Register.

The NSW Heritage Database is maintained by the Heritage Office and is a centralised database of heritage items included on all NSW statutory lists. It is of great benefit to the local council, the local community and other interested people as a comprehensive heritage list.

Step 13 The project manager, historian and heritage working group finalise the draft heritage study (including the thematic local history, the list of recommended individual heritage items and management recommendations).

The heritage study management recommendations must be supported by the heritage working group and council officers. The management recommendations must include best practice management recommendations and the model local environmental plan (LEP) clauses, available from the Department of Planning website (refer to Appendices I and J).

The draft heritage study will include (refer to Appendix E):

1. thematic history;
2. list of items recommended for statutory protection (refer to Appendix K);
3. list of conservation areas recommended for statutory protection, including (refer to Appendix K):
 - boundary definition curtilage
 - statement of existing character
 - statement of desired future character
 - option of 'special character' areas
 - key design guidelines to go into a development control plan. (DCP);
4. list of items for recording only (and reasons for these recommendations);
5. management recommendations, including:
 - LEP standard clauses (refer to Appendix L);
 - preparation of DCPs, either site specific or a heritage section for inclusion in a local government area wide DCP;
 - advice on what to do where there are conflicts between zoning and recommended items e.g. heritage sites in higher development areas;
 - review of incentive clauses to encourage conservation;
 - review of LEP exemptions;

- review of arrangements at the council to encourage the positive management of heritage items; and
- develop and implement a council heritage strategy, including recommendations for the management of council's own heritage items.

Step 14 Council officer sends a copy of the draft heritage study, heritage database and invoices to the Heritage Office for payment.

By this stage, council should have claimed at least 50% of the agreed project funding from the Heritage Office. To claim these funds please send in the following:

- a copy of the draft history and heritage study and/or a progress report
- an electronic copy of the SHI database and digital images
- copies of consultant invoices.

The Heritage Office will check the heritage database and advise if any additional information is required.

Step 15 Council officers and the project manager consult with individual owners of recommended heritage item about the draft heritage study and management recommendations prepared for their property.

This is a very important step. See the suggested standard letter to all owners of heritage items in Appendix H.

Follow up any earlier letters sent to owners about the site's history and ask them to check the heritage data form prepared for this item for accuracy. Take the time now to explain the management recommendations and how it will affect property owners and management of their property.

Step 16 Council officers and council management review the draft heritage study, management recommendations and heritage items.

Council officers and the project manager review comments submitted and determine amendments to listings. The project manager updates the study and listings with assistance of the heritage working group.

Council officers and council management must review the report and its recommendations in light of LEP implications and funding and other resource requirements.

The Heritage Office publication, *Eight Suggestions on How Local Councils can Promote Heritage Conservation* may be a useful reference for council at this stage and can be downloaded from the website at www.heritage.nsw.gov.au/publications.

Step 17 Council officers present the draft heritage study with a covering report to the councillors.

The council officer prepares a covering report that includes the following for presentation to the councillors.

1. It is the council's statutory responsibility under the Environmental Planning and Assessment Act to take appropriate action to list and manage heritage items in its area.
2. Council should list heritage items solely on their heritage significance:
 - if it is a heritage item it should be listed;
 - if it is not a heritage item it should not be listed;
 - if the significance as a possible heritage item is not clear it should be recorded.
- Council will implement the heritage study recommendations in the local government area through the amendment of council statutory and management processes.

The council officer, project manager and heritage working group members present the draft heritage study and covering report to the representative councillor on the project and full council.

Its important that the councillor and heritage working group are prepared to provide positive verbal support for the heritage study and its recommendations to council.

Step 18 Following councillor approval of the draft heritage study, council officers notify heritage item owners and the wider community about the heritage study and undertake a public exhibition and consultation process.

1. Place the heritage study on public exhibition for four to eight weeks. Council follows standard local government advertising procedures for the public exhibition process and council workshop.

Council should use all available media and presentation opportunities, community notice-boards and regular community organisation meetings to advertise the exhibition and public workshop and request submissions on the study.

2. Council sends notification letter (Appendix J) to affected potential heritage item owners about the public exhibition process and council workshop and requests submissions. See Appendix I for the standard text of an explanatory brochure that should be sent to all owners with the letter.

3. Council holds the workshop for councillors, council staff, project manager, heritage working group for affected owners of heritage items and the general community to seek feedback on the heritage study and its aims and implications.
4. Council staff and project manager review all submissions and amend the final heritage study, as required.

Step 19 Council officers send the final report and heritage database to the Heritage Office and claim all remaining project funding.

By this stage, council should claim 100% of the agreed project funding from the Heritage Office. To claim these funds council will need to send in the following:

- a copy of the final history and heritage study;
- an electronic copy of the final heritage database and digital images; and
- copies of all outstanding consultant invoices.

The Heritage Office will check the final heritage database, and assuming earlier advice has been followed, there should be few, if any, required changes. If changes are needed, the heritage database will need to be amended and resent to the Heritage Office before payment can be made.

Step 20 Council adopts the study and commences implementation, including LEP listings, promotion and incentives.

The council officers supported by the project manager and heritage working group, recommends that council adopts the final heritage study as a section 54 resolution and that council will prepare or amend the LEP to include the heritage items, heritage conservation areas, heritage provisions and incentives.

APPENDIX A DRAFT MODEL CONSULTANT'S BRIEF

LOGO

[NAME OF LOCAL GOVERNMENT AREA]

Dear

Tender for the Preparation of [name] Local Government Area Community-based Heritage Study Project

This council and the Heritage Office have agreed to jointly fund this project. I am pleased to invite you to submit a tender for the above project addressing the project brief requirements set out in this letter and the Heritage Office publication, *Community-based Heritage Studies: A Guide*, (see attachments).

The council's area includes [number] items which are listed or proposed to be listed in the heritage schedule to the Council's Local Environmental Plan. The area also includes many unlisted heritage items.

The scope of the project includes [council to define scope here and delete what is not applicable]: *all aspects of heritage including built, natural and landscapes, movable and Aboriginal sites* [The history of the local area may suggest that some of these aspects should be favoured over others.]

The consultant team will include a heritage consultant to manage this project and a historian to prepare a thematic local history. The roles are set out below:

Project manager's role

The project manager will be a heritage consultant with project management skills. Preferably they will have successfully managed a local heritage study and demonstrate the following skills:

- able to communicate clearly, lead and work with the community and council;
- select, lead and manage a community heritage working group;
- facilitate community workshops;
- assess heritage significance in line with Heritage Office requirements and prepare statements of significance;
- use the Heritage Database software (attend half-day training) to prepare heritage data forms for significant heritage items;

- manage and promote heritage conservation at the local level, including the LEP and DCP process and have an understanding of the *Environmental Planning and Assessment Act 1979* and the *Heritage Act 1977* (NSW) context and requirements;
- manage the project to complete the study on time and on budget;
- prepare policy recommendations and implementation strategies for the management and promotion of heritage in the area;
- liaise with, and make presentations to, council staff, management and councillors to ensure awareness of the purpose and findings of this study.

Historian's role

A historian's will be engaged as part of the consultant team to prepare a thematic local history. Preferably they will have previous experience in the preparation of a thematic local history. As historian they will need to:

- provide advice and use of the research and literature search process as outlined in step five;
- provide a historical account of the patterns of Aboriginal land use, colonial settlement including Aboriginal contributions, and historical events and processes;
- include a chronology. This will enable the history to be used in future research for other purposes after the study is complete;
- identify and relate the historical account to relevant national, state and local historical themes and identify gaps in historical themes;
- assist the project manager and heritage working group and attend a community workshop to identify potential heritage items which best illustrate the key themes, events and processes;
- review and provide advice on site specific histories for potential heritage items identified in this study, if requested by the project manager and heritage working group;
- assist in field work with the project manager and heritage working group to understand the historical context that has affected a site and/or assist in identifying historical sources beyond the local area.
- prepare a draft thematic local history;
- review and incorporate community, council, project manager and heritage working group comments into the final thematic local history.

An amount of \$[?] has been set aside for this project. This fee includes all costs for a thematic local history to be prepared as part of this study.

Telephone, office space, computer, appointment taking facilities and digital camera will be provided by council. The council will also provide a vehicle for your use while in the area on this study.

Attached to this letter are the proposed terms of engagement for this project.

If you are interested in tendering for this project, please send a submission that addresses the following:

- a brief statement outlining the project manager and historian's appropriateness for this project with reference to the skills and tasks outlined above;
- your acceptance of proposed project terms of engagement;
- a project plan with timeframes for key steps;
- a financial plan and breakdown into key steps;
- curriculum vitas for both the project manager and historian, including formal heritage qualifications and experience;
- two referees for previously successfully completed local government heritage studies.

Please send your tender submission to [name] at the above before [date].

If you have any queries would you please phone [name] at the council on [phone number].

Yours sincerely

[name]
General Manager

Attachments:

Terms of Engagement for Consultancy

Example of Completed Heritage Study Contents Page

APPENDIX B CONSULTANT TERMS OF ENGAGEMENT COMMUNITY-BASED HERITAGE STUDY

1. Role and Duties

The work to be carried out by the project manager and historian will be based on the procedure outlined in the Heritage Office's *Community-Based Heritage Study: A Guide*.

The work will be carried out in accordance with the agreed project plan, including a time frame for key steps and a financial plan with costs and payments for key steps.

2. Project scope

The scope of this project will include [council to determine and fill in this section as appropriate] :*all aspects of heritage including built, natural and landscapes, movable and Aboriginal sites*. [The history of the local area may suggest that some of these aspects should be favoured over others.]

3. Supervision

The project manager will generally report to the following nominated contact person at the council: [name, position].

The project manager will supervise the work of the historian and the heritage working group established for the purpose of carrying out the community-based heritage study.

4. Back-up facilities

Telephone, office space, computer, appointment taking facilities and digital camera are to be provided by the council. The council will also provide a vehicle for your use while in the area on this study.

5. Terms of payment

An overall budget with a lump sum payment of \$[?] has been established for this project. This fee includes all costs for a thematic local history to be prepared as part of the study.

It is agreed that regular payments will be made to the co-ordinator on the expectation that the final payment will only be paid on completion of the project.

6. Procedure for payment

You will be required to lodge a claim for payment with your nominated contact person at the council every two months.

7. Restriction on other work

While employed as the project manager, you or other persons or firms with whom you have a formal and/or financial association may not undertake other paid heritage work in this local government area, although you may seek council clearance to the following exemptions:

1. continuation of services to completion on a heritage project which had commenced at the time of your appointment;
2. work on any matter provided it does not:
 - (i) involve a heritage item, a heritage site or an item in a heritage conservation area, whether listed or not; or
 - (ii) involve any item which might reasonably be expected to have been the subject of assessment or conservation work; or
 - (iii) lead to a conflict of interest with the role of co-ordinator.

8. General conditions

Either party may terminate this agreement with one month's written notice. The terms of this contractual letter may be varied with the agreement of both parties and the endorsement of the Heritage Office.

9. Project commencement date

It is required that the project commence on [date]

10. Project completion date

It is proposed that the study be completed by [date]. Extensions or variations to this timeframe will be by agreement of all parties.

**APPENDIX C EXAMPLE OF CONTENTS PAGE
FOR COMPLETED HERITAGE STUDY**

THEMATIC HISTORY

The Aborigines
Squatters and Selectors
Irrigation and migration: a multicultural heritage
Developing the economy
Building settlements
Educating and governing
Developing a cultural life and marking the phases of life

HERITAGE STUDY REPORT

Executive summary
Introduction
Assessing significance
Local nominations
State Heritage nominations
Recommendations from the study
Strategy and implementation

References

Index

Appendices

Taken from (and modified):
(Kabaila, P. 2005 *Griffith Heritage*, Pirion Publishing)

APPENDIX D DRAFT LETTER OF OFFER

LOGO

[NAME OF LOCAL GOVERNMENT AREA]

Dear

Letter of Offer for the Preparation of [name local government area] Community-based Heritage Study Project

I am pleased to advise that you have been selected to prepare the (name) community-based heritage study.

You will be engaged in accordance with the following documents:

- project consultants brief;
- agreed project plan with timeframes;
- project financial plan;
- terms of engagement.

If you would like to accept this offer, please sign and date below and return to (name) by (date).

Yours sincerely,

[name]
General Manager

Attachments:
Terms of Engagement for consultancy

Acceptance of offer

I accept the terms and conditions of this consultancy specified in the project consultant's brief, Council terms of engagement and Heritage Office guidelines.


Signature *Date*

APPENDIX E COMPLETED SHI LISTINGS FOR HERITAGE ITEMS

<i>Shellharbour Heritage Inventory</i>			
Item Name		Albion Park Courthouse	
Other Names/s			
Group Name			
Location		94-96 Tongarra Road Albion Park 2527 Shellharbour	
		SHI Number	2380007
		Study Number	SH01-02
		Assessed Significance	Local
Item Type	Built	Statement of Significance Albion Park Court House has local significance as the principle court venue for the township since 1906 and as a good, and locally rare, example of a simplified Federation Arts & Crafts Court House. It is typical of small regional court houses of the early 20th century and has significance for its ongoing role in law and order in the area and as part of a larger complex of related buildings including the Magistrate's House and Police Station.	
Group	Law Enforcement		
Category	Courthouse		
Themes			
National	State Local		
7, Governing	Government and (none)		
7, Governing	Law and order (none)		
7, Governing	Law and order Law and order in Shell		
Owner	NSW Police Service		
Current Use	Courthouse		
Former Use			
Years	1906	Circa	No
Designer	Water Liberty Vernon, Government Architect		
Builder	Frederick Lemm of Dulwich Hill		
Physical Condition	Good		
Modification Dates	Recent major extensions to the rear and one side of the building; sympathetic and well integrated. Earlier verandah enclosure to the other side is unsympathetic.		
Further Comments			
		Physical Description Simplified Federation Arts & Crafts public building constructed of red brick with roughcast stucco on the chimneys and bracketed eaves. Verandah to side wing of original building. The original front entry features a stucco label mould above the arched opening. The roof is of terracotta tiles, gambrelled above the original entry.	
		Historical Notes The people of Albion Park petitioned the Minister of Works in 1890 to resume land for a courthouse, police station and post and telegraph office. The District Court and lock-up moved from Mary Street, Shellharbour in 1894. The site for the new courthouse and lock-up for the Shellharbour district was a 8100 sqm block selected from the Terry's Meadows Estate. Temporary premises were erected at Albion Park but this building did not last long. Plans for a new courthouse were drawn up by the Government Architect's office with tenders called 1 May 1907, and accepted 4 June 1907. The courthouse was completed and occupied on the 21 February 1908, at a total cost of 1400 pounds.	
<i>Shellharbour Heritage Inventory</i>			
Date: 9/01/2007	Date First Entered	Date Updated: 09/01/2007	Data Entry Status: Completed
			Page: 1

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Shellharbour Heritage Inventory

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Item Name Albion Park Courthouse	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">SHI Number</td> <td>2380007</td> </tr> <tr> <td>Study Number</td> <td>SH01-02</td> </tr> <tr> <td>Assessed Significance</td> <td>Local</td> </tr> </table>	SHI Number	2380007	Study Number	SH01-02	Assessed Significance	Local																																								
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Caption Albion Park Courthouse Copyright: Image by: Date: 1/03/2001 Number:																																															
Assessment Degree Criteria SHR Criteria f) Has rarity within a local context as one of a small number of Federation Arts & Crafts public buildings in the Shellharbour LGA. SHR Criteria g) Of local significance as good representative example of a simplified Federation Arts & Crafts court house in a regional centre. Intactness / Integrity Substantially intact although altered in recent years.	Assessment Criteria SHR Criteria a) Of local significance for its role in the development of the local community and its historic role in the provision of law enforcement services. Of further significance as a good example of a simplified Federation Arts & Crafts court house. SHR Criteria b) Of local significance for its association with the Attorney General's Department and the development of law and order in regional centres. SHR Criteria c) Of local significance as a good example of a simplified Federation Arts & Crafts court house. Of further significance as one of the few remaining buildings in the area to employ this architectural style and as part of a complex of related buildings including the Magistrate's House and Police Station. SHR Criteria d) Of local significance for its role in the development and provision of law and order in Albion Park for over a century. SHR Criteria e) N/A																																														
Recommended management (shs) include in SLEP No.16, in Heritage DCP, in educational package, in Tourist Drive																																															
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Clarence Valley Heritage Inventory

Item Name Stone Cottage		SHI Number 1990052
Other Names/s Madean Museum		Study Number 86
Group Name		Assessed Significance Local
Location Wharf Street & Gratton Street Madean 2453		Clarence Valley
Item Type Built	Statement of Significance	
Group Recreation and Entertainment	<p>The stone cottage is important historically and architecturally. It is historically significant because it is associated with a German migrant who was one of many Germans to settle in the Clarence valley in the 1850-60s. These German settlers made a considerable contribution to the economic development of the region. It is architecturally significant for its use of local sandstone and draped iron verandah. It is a rare example of a stone cottage in the Clarence Valley and is enhanced by use current use as a Museum.</p>	
Category Art Gallery/ Museum		
Themes		
National State Local		
4. Settlement	Accommodation (none)	
Owner Local Government	Current Use Museum	
Former Use Residence		
Years 1880 Circa Yes	Physical Description	
Designer	<p>Small sandstone cottage built from stone quarried at the site. Sandstone walls and sub floor base. Bricks used decoratively above windows and in chimney. Plan of house consists of rectangular main portion (4 rooms) with extended rear wing (kitchen), all having hipped galvanized iron roof. Draped iron (ogee shaped) verandah to two faces of building supported on sandstone piers. Verandah has nicely detailed chamfered timber posts, scalloped and drilled valance board and cross rail balustrade. Joinery painted white is in good condition with louvre shutters to verandah doors. Internal walls rendered with tongue and groove board in the ceiling. Building sits comfortably at corner intersection in well landscaped grounds and attractive but very steep stone steps to central entry.</p>	
Builder Johann Schaefer		
Physical Condition Well maintained		
Modification Dates New verandah floor boards 2004	Historical Notes	
Further Comments An important house historically and architecturally for its use of sandstone and draped iron to verandah.	<p>From the Maclean & District Historical Society Flyer " the stone cottage was built by Johann Georg Schaefer between 1879 -1888. The sandstone blocks were quarried from the site and as they were protected by verandahs have retained their original colour. The timber was sourced locally. Johann Schaefer came to Australia in the barque "Caesar" which brought a full complement of German immigrants from Hamburg in 1855. His wife accompanied him and they lived at Broadwater and Wombah before purchasing this land from George Watson in 1879. After Johann's death in 1905 the cottage was lived in by Mary Gregory whose daughter Minnie married Garibaldi Tyler a well known photographer and business man in Madean. Mrs Gregory died in 1915 and the cottage was subsequently occupied by a series of tenants. It was acquired by Maclean Shire Council and given to the Madean Historical Society for development in 1973. The stone cottage now houses part of the Society's collection and forms part of the Museum complex. The items within the Stone Cottage have been sensitively selected and reflect domestic life at the turn of the century. A Bicentennial grant enabled the Society to build a research and museum in 1988.</p>	
State Heritage Inventory		
Date: 9/01/2007	Date First Entered: 29/05/2001	Date Updated: 09/01/2007
Data Entry Status: Partial		Page: 1

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Clarence Valley Heritage Inventory

Item Name Stone Cottage		SHI Number 1990052
Other Names/s Maclean Museum		Study Number 86
Group Name		Assessed Significance Local
Location Wharf Street & Grafton Street Maclean 2463 Clarence Valley		

<p>Images</p> <div style="text-align: center;">  </div> <p>Caption Stone Cottage - from Wharf Street</p> <p>Copyright: Clarence Valley Council Image by: Jane Gardiner Date: 28/05/2005 Number:</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4">Listings</td> </tr> <tr> <td>Name</td> <td>Number</td> <td>Date</td> <td></td> </tr> <tr> <td>Local Environmental Plan</td> <td></td> <td>11/05/2001</td> <td></td> </tr> <tr> <td>Heritage study</td> <td></td> <td></td> <td></td> </tr> <tr> <td>National Trust of Australia Register</td> <td>3676</td> <td>11/02/1974</td> <td></td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4">References</td> </tr> <tr> <td>Author</td> <td>Title</td> <td>Year</td> <td></td> </tr> <tr> <td>Maclean & District Historical Society Inc</td> <td>The Bicentennial Museum and Stone Cottage</td> <td></td> <td></td> </tr> <tr> <td>National Trust of Australia (NSW)</td> <td>National Trust of Australia (NSW)</td> <td></td> <td></td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4">Studies</td> </tr> <tr> <td>Author</td> <td>Title</td> <td>Number</td> <td>Year</td> </tr> <tr> <td>T. Sheehy</td> <td>Maclean Shire Heritage Study</td> <td>86</td> <td>1989</td> </tr> <tr> <td>Jane Gardiner</td> <td>Maclean Heritage Study</td> <td></td> <td>2006</td> </tr> </table>	Listings				Name	Number	Date		Local Environmental Plan		11/05/2001		Heritage study				National Trust of Australia Register	3676	11/02/1974		References				Author	Title	Year		Maclean & District Historical Society Inc	The Bicentennial Museum and Stone Cottage			National Trust of Australia (NSW)	National Trust of Australia (NSW)			Studies				Author	Title	Number	Year	T. Sheehy	Maclean Shire Heritage Study	86	1989	Jane Gardiner	Maclean Heritage Study		2006
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<p>Assessment Degree Criteria</p> <p>SHR Criteria f) It is a rare example of a locally quarried stone residence in the Maclean district.</p> <p>SHR Criteria g)</p> <p>Intactness / Integrity Intact</p> <p>Recommended management</p>	<p>Assessment Criteria</p> <p>SHR Criteria a) The stone cottage is historically significant because it is associated with a German migrant who used his knowledge to build a cottage out of local sandstone. German migrants made a considerable contribution to the economic development of Grafton and the Clarence river region.</p> <p>SHR Criteria b) The cottage is associated with Johann Schaefer a German migrant.</p> <p>SHR Criteria c) It is an extremely attractive building located in a commanding position on Wharf Street.</p> <p>SHR Criteria d)</p> <p>SHR Criteria e)</p>
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State Heritage Inventory

Date: 9/01/2007 Date First Entered: 29/05/2001 Date Updated: 09/01/2007 Data Entry Status: Partial Page: 2

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LOGO

[NAME OF LOCAL GOVERNMENT AREA]

HERITAGE STUDY

COMMUNITY HERITAGE WORKING GROUP

We are preparing a list of heritage places and items valued by the community.

We are seeking your help with this project.

Residents of the area interested in its history and heritage are invited to join the project heritage working group.

If you are interested in nominating for a position on the heritage working group please contact:

[Name of contact]

[Telephone / fax numbers]

[E-mail address]

The closing date for nominations is [DAY / DATE]

[Signature]

General Manager

***This project is supported by the Heritage Office, NSW
Department of Planning***

LOGO

[NAME OF LOCAL GOVERNMENT AREA]

**HERITAGE STUDY
CALL FOR INFORMATION**

We are preparing a list of heritage places and items valued by the community. The provisional list can be inspected at Council libraries or at the Council's Planning Department.

We are seeking your help with this project.

This project is being managed by a community heritage working group that is being co-ordinated by [Name], [profession]. If you would like to:

- express your views on the potential heritage items
- provide additional information on the heritage items, or
- suggest additional heritage items

please contact the following members of the heritage working group:

1. [Name of contact]
[Telephone / fax numbers]
[E-mail address]

2. [Name of contact]
[Telephone / fax numbers]
[E-mail address]

3. [Name of contact]
[Telephone / fax numbers]
[E-mail address]

The closing date for comments is [DAY / DATE]

[Signature]
General Manager

***This project is supported by the Heritage Office, NSW
Department of Planning***

APPENDIX H REQUEST FOR INFORMATION FROM OWNERS OF NOMINATED HERITAGE ITEMS

COUNCIL LETTERHEAD

Dear

[Name of LGA] Community-based Heritage Study - Draft List of Possible Heritage Places and Items

Council is preparing a draft list of places and items valued by the community that we would like to keep for future generations. These places and items are evidence of the history of the local government area. The project is being managed by a community heritage working group under the supervision of [name], [profession].

The heritage working group has suggested that the property at [address] should be included in the draft list because of its importance to the history of the local area. All owners of properties on the draft list are being contacted to seek their comments on the proposal and also any further information which may not yet be part of the public record.

The attached provisional listing information of your property explains why the heritage working group considers it has heritage significance. We are interested in amending the listing in the light of any information you may care to offer to us.

I also enclose a brochure that explains the purpose of the heritage study, the listing process and the benefits that council will be offering to the owners of listed properties.

If you wish to comment on the proposed listing, ask questions or offer additional information, please contact me on [phone number], [fax number] or [e-mail address].

Yours sincerely

[signature]

[name]

Chair

Heritage Working Group

***This project is supported by the Heritage Office, NSW Department of
Planning***

APPENDIX I STANDARD TEXT FOR EXPLANATORY BROCHURE

[Heritage Office and NSW Department of Planning logos]

Heritage Listings

An Explanatory Guide for Owners of Potential Heritage Items

How are places listed?

Privately-owned properties can be listed on:

- schedules to **local environmental plans** (for items nominated on the basis of their heritage significance for the local government area); OR
- **the State Heritage Register** (for items nominated on the basis of their heritage significance for the State).

The preparation of these lists is a requirement of the relevant legislation:

- *Environmental Planning and Assessment Act 1979* (for local items); OR
- *Heritage Act 1977* (for state items).

Why are items nominated for listing?

The heritage of our local area is the places and objects we want to keep because they provide evidence of our history.

How are items assessed for listing?

There are criteria against which items have to be tested - their historic, aesthetic, scientific or social significance, their connection with historical persons, or their rarity or representativeness within the local area.

What will listing of my property mean?

Listing recognises the heritage significance of your property against one or more of the assessment criteria. It is a mark of the community's respect for the property as evidence of the history of the area. Documentation associated with the listing will indicate the aspects of the property that have the greatest heritage significance. You will need to apply to the council to make major changes that may affect its heritage significance.

How will the value of my property be affected by the listing?

Because the listing has been proposed by the community it may well increase its monetary value because the listing adds prestige to its real estate

valuation, and creates certainty that its heritage values will be retained. In many areas of NSW properties with intact original features attract higher resale value than properties of a similar age that have been modernised unsympathetically.

Does this mean I can never change my property?

The point of listing is to recognise heritage value, not to prevent adaptation to the owner's changing needs. You can retain original features and also install modern conveniences, such as central heating, or add new living spaces. The council offers free advice to help you to make appropriate decisions for these adaptations.

Does the listing affect my rights as owner?

The owner retains all rights in the property. Listing is a mark of the community's esteem, which we hope you share.

Is the whole of my property affected by the listing?

The documentation associated with the listing will indicate which parts of the property have greatest heritage significance. Sometimes views to and from the place, or its internal fittings and contents may be a part of its significance if they reflect its heritage importance.

APPENDIX J NOTIFICATION LETTER TO HERITAGE OWNERS

COUNCIL LETTERHEAD

Dear

**[Name of LGA] Community-based Heritage Study
Notification of Public Exhibition, Consultation Process and Community
Workshop**

Council has approved the draft [name of LGA] community-based heritage study for public exhibition. As part of this consultation process, council is now calling for comments on the study and nominated heritage items.

The heritage study provides a history of our area and nominates places and items that are evidence of the history of the local government area. This project is being managed by a community heritage working group under the supervision of [name], [profession].

The study will be on public exhibition from [dates] and can be viewed at [location].

I understand that your property is included as a potential heritage item which will be nominated for inclusion on the Local Environmental Plan heritage schedule. As owner of the nominated heritage item, a copy of this listing is attached to this letter. We welcome your comments on this listing. I have also attached for your information an explanatory brochure that sets out what heritage listing means.

Council also invites you to attend a community workshop to discuss the study recommendations on [day, date, time, location]. Please see the attached brochure for details.

We look forward to your comments on the study and specific feedback on the heritage items and your attendance at the workshop. If you require further information, would like to ask questions or offer additional information, please contact [name] on [phone number], [fax number] or [e-mail address].

Yours sincerely

[signature]

[Name]
[position]
Council

Attachments:

Heritage database form for nominated heritage items

Invitation to Community workshop

Heritage information brochure (see Appendix I)

This project is supported by the Heritage Office, Department of Planning

APPENDIX K LEP HERITAGE SCHEDULES STANDARD FORMAT

The Department of Planning website contains the latest information on LEP standard requirements. Please refer to www.planning.nsw.gov.au and go to 'practice notes' and search for the latest update on standard LEP instruments. The following information is included in PN06-001.

Part 1 Heritage Items

Column 1	Column 2	Column 3	Column 4	Column 5
Suburb	Item Name	Address	Property Description	Significance
Example Adamstown	Adamstown Post Office	195 Brunker Road	Lot 1 DP 222812	Local

Part 2 Heritage Conservation Areas

Column 1	Column 2	Column 3
Description	Identification on Zoning Map	Significance
Example Cooks Hill	Shown by heavy black broken line and marked Cooks Hill Heritage Conservation Area	State

APPENDIX L LEP STANDARD HERITAGE PROVISIONS

The Department of Planning website contains the latest information on LEP standard requirements.

Please refer to www.planning.nsw.gov.au and go to 'practice notes' and search for the latest update on standard LEP instruments, PN06-001.