

# BRIEF

## [Register name]

# Conservation Management Plan



Ref: SHP xxxxx

## OUTLINE BRIEF FOR SHP xxxxx

### [Register name] Conservation Management Plan

#### PURPOSE

Heritage South Australia is seeking a [fee offer/cost estimate] to [prepare/update] a Conservation Management Plan (CMP) for Register name (SHP xxxxx). The [fee offer/cost estimate] will be used to apply for a Government Owned Heritage Fund (GOH Fund) grant. Heritage SA can arrange for a site meeting at the [register name] to assist in the preparation of the fee offer/cost estimate.

[If fee offer –Fee offers will be evaluated against the criteria below.]

[If cost estimate - If the GOH Fund application is successful, formal tenders will be requested and evaluated against the criteria listed below.]

The purpose of the [Register name] CMP is to guide the ongoing conservation and future management and use of the [register name] based on an understanding of its history and significance, an investigation of its physical condition and an analysis of its construction and integrity. The CMP should include consideration of the whole site, including [add site components/structures considered to form a place of the place, this may also include landscape elements and objects].

#### BACKGROUND

[brief overview history of the place, typically a single paragraph]

For example – delete from final document.

The Athelstone Mill was built in 1845 by William Dinham as a grist or flour mill and was constructed by Messrs Scones and Martin. Sited on the banks of the River Torrens at Highbury, it was powered by a water wheel from a mill pond created by damming the river. The wheel and mill pond have since been removed, however remnants of the flume system, comprising stone terracing, remain on the banks of the River Torrens to the north of the mill. The mill is one of the earliest flour mills in South Australia and represents the development of primary production in the early years of the colony.

#### PREPARATION OF THE CONSERVATION MANAGEMENT PLAN

The following guidelines have been prepared to identify the minimum requirements of the CMP and to assist the Contractor in the preparation of the [fee offer/cost estimate].

**Collection of Information:** The Contractor shall collect, collate and present historical evidence sufficient to establish the cultural significance of the place, in both a regional and State-wide context. Sources of information should include primary and secondary documentary sources and a physical survey of the place and may also include oral sources as applicable.

The Contractor should ascertain the extent and relevance of available information before submitting a [fee offer/cost estimate].

**Physical Survey:** The Contractor shall undertake a physical survey of the place. The results of this survey should be presented in written form, supplemented by drawings, diagrams and photographs as necessary. The purpose of the survey is:

- to provide a detailed description of the building fabric
- to identify the original/significant form, construction and materials of the structure/s, and to illustrate different stages of construction and subsequent changes
- Illustrate levels of significance of individual areas of the Place
- to determine the dilapidation of the structures and their various components

- to determine significance of remnant landscape elements and plantings and building remains.

The physical survey shall be presented so that it can form the basis of documentation required for future conservation works.

The Contractor shall also provide a site plan of the property showing the locations of all related elements.

**Historical Development:** Use of the [register name] has varied over time. Thorough examination should be given to all phases of its history, [including but not limited to dot points of aspects that require specific consideration]

**Cultural Significance:** The Contractor shall prepare a Statement of Cultural Significance based on the history of the place, the physical survey and other relevant information. The consideration of cultural significance should address the s16 criteria in the *Heritage Places Act 1993*, show a logical progression from the information gathered and build on the Statement of Significance approved by the South Australian Heritage Council. Analysis and evaluation of heritage value against all s16 criteria is required.

Where appropriate, relative levels of significance should be assigned to various elements in accordance with their contribution to the heritage values of the place.

**Conservation Policies:** The Contractor is to develop and present Conservation Policies that will guide the conservation, maintenance and future use of the place. These policies shall be firmly based on the Statement of Cultural Significance, and on accepted standards of conservation practice, including but not restricted to those outlined in J.S. Kerr *The Conservation Plan* and in *The Burra Charter: the Australia ICOMOS Charter for Places of Cultural Significance, 2013*. The policies are to include consideration of the following issues:

- Dilapidation of building fabric and its conservation/ repair
- Reinstatement of known lost heritage fabric
- Routine maintenance requirements
- Archaeological potential
- Statutory requirements
- Climate Change adaptation
- Future uses/ adaptation
- Interpretation

The Contractor shall identify in detail conservation works required to the place through the preparation of a dilapidation schedule. The schedule is to identify building fabric dilapidation, prioritise and document required conservation actions for repair/ reinstatement, with a cost estimate for each action. Staging of works by priority is to be considered.

A costed maintenance schedule and program should be provided to guide the owner in the future cyclical maintenance of the place.

**Deliverables:** The CMP shall be arranged under the following headings:

1. EXECUTIVE SUMMARY
  - Objectives
  - Heritage Value
  - Statement of Significance, Elements, Degree of Significance, curtilage
2. INTRODUCTION
  - Brief
  - Methodology
  - Location, heritage status etc.
  - Acknowledgements
3. HISTORICAL DEVELOPMENT
  - Preparation of a detailed history of the Place.
    - Indigenous overview history of locale
    - Post-settlement history in detail, as relates to development of the place
  - Chronology of events (timeline)
4. ANALYSIS OF THE PLACE
  - Stages of construction, use, condition of place
  - Historic/ Social analysis of place (structures and site)

- Aesthetic/ technical analysis of place
  - Cultural landscape analysis
  - Comparative analysis/ rarity/ representation
  - Extant fabric – intactness and integrity
  - Condition - dilapidation (generally)
  - Site conditions – dilapidation (generally)
5. CULTURAL SIGNIFICANCE
- National value - test
  - State Heritage Place value (Section 16 Criteria) and guidelines tests
  - Local Heritage Value - test
  - Statement of Cultural Significance: Statement of the Cultural Significance for the Place
  - Degree of Significance of the parts of the place and collection – prioritise and list elements and setting (E.g. Exceptional, Considerable, Some, Minor, Nil/ Intrusive)
  - Curtilage of site – physical definition based on cultural significance values and important views to and from key locations within the site
6. CONSERVATION POLICY
- Heritage values recognition
  - Conservation actions – heritage fabric and ephemera
    - Dilapidation Schedule – current condition and conservation actions, priorities and staging
    - Reinstatement of heritage fabric
    - Routine maintenance
  - Archaeological potential
  - Statutory requirements
  - Climate Change adaptation
  - Future uses/ adaptation
  - Interpretation strategy
  - Financial Support
  - Adoption and Review
7. BIBLIOGRAPHY
8. APPENDIX (CES)

[If the CMP is only being updated and an existing history, either from a previous CMP or Assessment Report, is sufficiently comprehensive it may be used verbatim with the original source prominently acknowledged at the beginning of the section. As the existing history may have been completed some years prior, it needs to be updated to the present. If this option is being used replace text above with]

3. HISTORICAL DEVELOPMENT
- Review of existing history of the place and
    - Prepare Indigenous overview history of locale
    - Correct any inaccuracies in existing history
    - Prepare missing sections of the history where there are gaps
  - Prepare Chronology of events (timeline)

**Format:** The CMP is to be presented in A4 format in both printed and digital format.

The font type and size must be easy to read in both print and digital formats. Quality of legibility should not be lost if the document is converted to a pdf.

Illustrations in the CMP should be CAD format drawings and black and white or colour photographs. Photographs are to be prepared and originals provided to DEW or provided in digital format (preferably RAW format).

## Review

The Contractor shall allow to present a first draft and a final draft of the CMP for review. On completion of the final CMP, the Contractor shall present a first-generation print-out ready for binding by DEW. In addition, a copy of the CMP shall be provided to DEW on a PDF digital medium.

## PROGRAM:

Fee offer/Cost estimate closes [dd month yyyy].

[if cost estimate - Once GOH Fund grant has been approved, Contractor will be given one month to provide a formal Fee Offer. Heritage SA can arrange for a site meeting at the [register name] as part of this process.]

Once a fee offer has been accepted, the following schedule should be considered:

Contractor engagement	to be negotiated after notification of successful GOH fund application
Submit first draft	12 weeks
Review period	2 weeks
Submit final draft	4 weeks
Review period	2 weeks
Lodge final CMP	2 weeks

**Contractor Agreement:** The Contractor will be engaged by *the department or owner responsible for commissioning the preparation of the CMP*. Engagement is through a Standard Goods and Services Agreement as per government procurement procedure.

**Formal fee offers** should clearly explain how the requirements of the brief will be fulfilled and include:

- Team composition, noting qualifications and experience of each individual to complete the assigned tasks in the preparation of the CMP,
- a breakdown of fees for the preparation of each stage, and
- a proposed fee billing schedule

The Contractor and subcontractors must be inducted on site by *the department or owner responsible for commissioning the CMP* and provide an independent risk assessment of the site prior to commencing physical assessment.

The Contractor and or subcontractor, is to vest copyright of the completed CMP and any accompanying drawings and images with DEW. This is to allow relevant information to be used for obtaining Development Approval and for seeking quotations for work, or for making information available to others with a bona fide interest in the property.

DEW may publish the CMP or parts of it on the DEW website or in the South Australian Heritage Register. The Contractor and or subcontractor, will be acknowledged as the primary author.

## Insurance:

\*Public Liability Insurance is a mandatory requirement and the minimum level of Public Liability Insurance is \$1,000,000.

\*Professional Indemnity Insurance of \$1,000,000 is desirable.

## EVALUATION:

The following evaluation criteria and weightings have been determined:

Cost	20%
Cost management strategy to optimize value for money	5%
Project understanding	30%
Indicative program	5%
Relevant contractor and sub-contractor capabilities, including but not limited to experience and past performance.	20%
Team composition and respective roles, anticipated time allowances for each member and corresponding schedule of hourly rates.	20%