



Heritage Advisory Services Handbook

a national guide for Government,
Advisors and the Community

Supporting Local Government Project

The Heritage Chairs and Officials of Australia and New Zealand

Cover Images (Left to Right):

Heritage Advisor Barbara Hickson on a site inspection for Bathurst Regional Council, New South Wales. Image courtesy Sinclair Croft, Bathurst Regional Council

Heritage Advisor, Therese Willis provided advice to owners and council on the redevelopment and restoration of this historic hotel in the City of Norwood, Payneham and St Peters, South Australia. Image courtesy Therese Willis, Heritage Advisor

Heritage Advisors receiving training on traditional timber techniques, Rouse Hill, New South Wales. Graham Fall and James Findlay demonstrating traditional timber skills at the Cumberland Vernacular Symposium on 4 July 2008 presented by the Historic Houses Trust of NSW and the Association for Preservation Technology. Image courtesy Peter Marquis-Kyle at Rouse Hill House.

Commonwealth of Australia for the Heritage Chairs and Officials of Australia and New Zealand (HCOANZ).

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Disclaimer

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1.

Introduction and purpose of handbook

Heritage advisory services were first established in Victoria in 1977 and, since that time, have developed across Australia.

A heritage advisory service involves appointment of a heritage expert to give free advice to a local government authority, residents and businesses on all aspects of local heritage conservation from maintenance and repairs, renovations, additions and advice on funding and incentives, policy and strategic heritage advice. Services are usually, or initially, funded in a joint partnership between state and local governments.

A 1997 assessment and evaluation of the services (McDougall & Vines, Heritage Advisory Services: Towards Best Practice – see <http://www.environment.gov.au/heritage/ahc/publications/commission/books/advisory-services/>) concluded that Heritage Advisory Services were:

“The most cost effective funding programs for heritage management in Australia.”

The 1997 assessment recommended that national standards and guidelines be developed, resulting in the first edition of the manual in 2000.

This revised manual draws together practical aspects of establishing a heritage advisory service and providing a resource for heritage advisors. It is not a definitive document and may be adapted as necessary.

Since the publication of the first edition, a number of state agencies have developed specific standard documents, contracts and templates for use by local governments in setting up and managing heritage advisory services. Additionally, a number of local councils are effectively managing local heritage (and providing advisory services and other incentives to the local community) independent of state financial assistance.

2. What is a Heritage Advisory Service?

2.1 Purpose

The main goal of a heritage advisory service is to assist local and state governments and the community in managing and conserving local heritage.

The programs provided by heritage advisory services have been successful in developing a positive attitude towards heritage through the provision of free heritage advice to councils, communities and owners of heritage properties.

Throughout many towns, the benefits of these services are now evident with restored heritage buildings, reconstructed verandahs, appropriate signage, upgraded streetscapes, additional street planting and, in most cases, a changed community perception towards the value of heritage. The advisor position may serve as a catalyst for local heritage conservation and presentation.

Heritage advisory services continue to be one of the most popular and successful heritage incentives adopted by local government. For first-time participating councils, the heritage advisory service remains a cost effective and positive first step to improving local heritage management and community attitudes to heritage.

2.2 Framework of Heritage Advisory Services in Australia

The roles and functions of heritage advisory services can be summarised as follows: Advisors assist the **general community** by providing:

- first point of contact for owners and residents - available for free consultation
- education of community in heritage issues
- raised awareness of breadth and value of heritage places
- assistance in interpreting community wishes regarding heritage
- an explanation of relevant heritage legislation and regulations
- facilitation of contact between individuals and council/state government
- advice on relevant sources of funding and non-financial contributions

Advisors assist **local government** by providing:

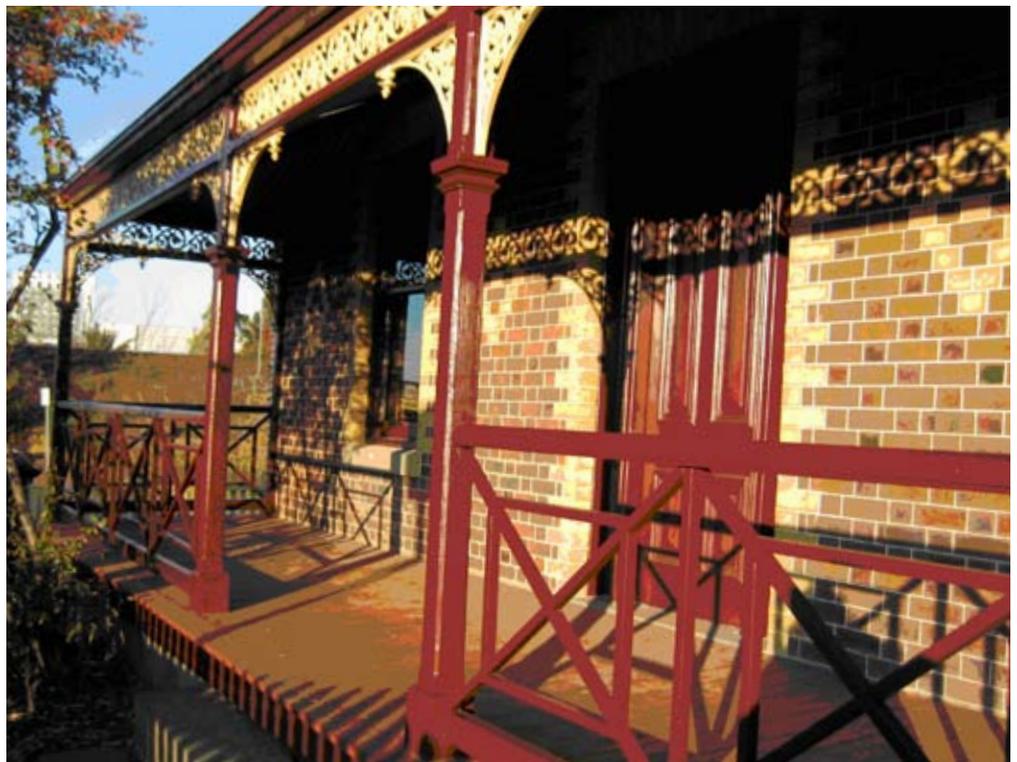
- heritage and conservation advice for owners
- planning process input
- expert advice on development applications affecting heritage
- development of policy initiatives in associated areas
- delegated authority for places listed in the state register (in certain states only)
- provision of cost efficient heritage services
- liaison with other community heritage bodies
- conservation of council-owned assets

Advisors assist **state and territory governments** by providing:

- assistance with state funding programs
- preparation of heritage inventories
- providing data on local heritage management to state government
- interpretation of state legislation at local level
- assistance with management of state heritage listed properties
- ensuring consistent conservation standards at local level

The current status of heritage advisory services in Australia and future directions of heritage advisory services are contained in Attachments 1 and 2.

Heritage Advisor David Rowe provided advice on this restored house for City of Greater Geelong Council, Victoria. Image courtesy Ray and Jennifer Bantow.



3. Conservation Philosophy and Approach

3.1 Australia International Council on Monuments and Sites (ICOMOS)

Australia ICOMOS (www.icomos.org/Australia/) is the Australian non-government professional heritage organisation that promotes best practice in caring for culturally important places, and was responsible for developing and establishing the Australia ICOMOS Burra Charter, 1999 (*the Burra Charter*) (www.icomos.org/Australia/burra.html). Members include administrators, archaeologists, architects, engineers, landscape architects, historians and planners, all of whom are involved with heritage conservation.

Advisors must be fully conversant with current conservation principles and practice applicable in Australia and it is recommended that an advisor is a full member of Australia ICOMOS.

3.2 The Burra Charter

The *Burra Charter* is the widely accepted reference document for heritage conservation standards, philosophy and methodology in Australia. An understanding of the *Burra Charter* helps individuals (including heritage advisors) with the care of places of cultural significance. Using the framework of the *Burra Charter*, more informed decisions about the management of the place can be made.

The *Burra Charter* was first developed by heritage practitioners in 1979 and has been widely adopted, informing the development of state and local heritage systems and legislative regimes. It underpins Australia's local, state/territory and national heritage management systems.

Full members of ICOMOS practice in accordance with the *Burra Charter* and the Ethical Commitment Standard for ICOMOS Members (Revision, November 2002, Madrid – www.icomos.org/australia - Membership).

3.3 Heritage Identification, Conservation and Management Tools

Heritage advisors are likely to be involved in the commissioning, preparation, assessment or use of a range of heritage identification, assessment and management documents.

These include: heritage studies or surveys, archaeological surveys; thematic histories, heritage assessments, nominations; impact statements; conservation management strategies, conservation plans and conservation management plans; condition assessments; works plans; maintenance schedules; asset management plans; expert evidence; archival recording and interpretation strategies and plans. Appointed advisors understand the purpose of these documents and, depending on the expertise involved, are able to to prepare, evaluate, interpret and apply them.



Heritage Advisor, Robert Staas meeting with applicant, Mosman Council, New South Wales. Image courtesy Linda Kelly, Mosman Council.

One of the common heritage management tools are Conservation Management Plans (CMP). “For most heritage places these plans deal with the management of change” (Kerr, *The Conservation Plan*, National Trust New South Wales, Sydney 2000: 1).

The plan is a document establishing the heritage significance of a place or area and outlines conservation policies and management mechanisms that are appropriate to enable that significance to be retained. It is an effective tool in making appropriate conservation and management decisions and can be used to assess the heritage impact of the proposed development on the place and its setting.

A heritage advisor can assist in the preparation and/or administration of CMPs for heritage places within their area. Many state heritage agencies or departments have model briefs for the preparation of a range of heritage reports. At local government level, a more effective response can be a Conservation Management Strategy. This is a briefer version of a CMP and provides a broad overview of conservation approaches and management guidance.

4. Establishing a Heritage Advisory Service

4.1 Funding of Services

Funding options for heritage advisory services vary between jurisdictions and are dependent on local circumstance. There is no preferred model for funding but, in almost all cases, a shared state government/local government model is a practical way to establish a new service. This allows for assistance and direction to be provided by the state heritage authority during the establishment phase of any service. In many cases, services become fully funded by local government after an initial shared establishment period. Funding options are as follows:

Shared state government/local government funding - this is effectively used in most states with the contributions reaching an equal split between state and local government.

Less established heritage advisory services rely on the state making proportionally higher contributions to fund them. The level of shared funding is established by the state heritage authorities. There is a trend by state authorities to shift the financial responsibilities of these services to local government where possible.

Fully funded services by local government - in metropolitan areas (and particularly with merged councils having larger rate bases) it may be possible and appropriate to hand over full funding responsibilities to local government. This is required in New South Wales and Victorian metropolitan councils and in only a few instances have heritage advisory services terminated due to withdrawal of state government funds. The ability for local councils to absorb the costs will differ across the states. Local governments in metropolitan areas can often fully fund a **full time heritage officer** or employ strategic or statutory planners with heritage expertise.

4.2 Extent of Service Provision

The type of service provision varies from better established regimes in Victoria and NSW, to smaller, less established services in WA regional areas, and to a limited number of full-time services, mostly in inner urban areas. Even within well established regimes, there is significant variety. In Victoria, across all LGAs, advisory services average three hours per week. Some councils utilised a regular one day of advice a week, others a minimum.

States employing joint funding agreements include Victoria, where a fixed maximum grant of \$12,000 is allocated to establish an advisory service.

In Western Australia, most local councils contribute to the hours delivered by heritage advisors who are employed on an hourly basis, from eight to 56 hours per month. In WA, the program's budget allocation for 2007-08 is some \$528,000 with \$100,000 contribution from local governments.



Heritage Advisor Lorraine Huddle in the field with Parks Victoria rangers for East Gippsland Council and Parks Victoria, Victoria. Image courtesy Lorraine Huddle, Heritage Advisor

In South Australia, while councils jointly fund heritage advisory services with the state, the state may manage the contract and appointment of the advisor for local governments. However, in most cases the advisor is appointed with the agreement of the state and the position managed by local government.

In New South Wales, joint funding is available to all rural councils, up to \$7,000 per annum. For the first four years, funding for council's advisor is provided on a dollar for dollar basis. From the fifth year, funding support is reduced to \$1 for \$2 contribution.

Arrangements to manage the appointment of advisors varies. In New South Wales and Victoria, advisors are appointed by local councils. As a condition of funding councils report to the state heritage authority annually.

In areas with well established heritage advisory services, eligibility criteria is further refined. In Victoria, assistance is targeted at rural, regional and fringe municipalities. All councils are eligible to apply except for those in inner and metropolitan councils (with exceptions) which have already received 10 annual grants. In New South Wales funding for metropolitan councils is only available to local councils which have not previously contracted an advisor and is limited to three years.

While many local government areas are without access to heritage expertise, some rural and regional councils are even under-resourced in generalist planning staff. Where local government fully funds heritage advisory services, it is recommended that the state government agency provides a framework for training, networking and collaboration with other heritage advisors.

Outside a centralised heritage advisory service program, a number of councils, such as in Tasmania, directly employ conservation architects or heritage consultants to provide strategic and statutory heritage advice to council, as required.

The extent of the role of the advisor will depend on local government resources, staffing and availability of in-house heritage expertise. In the Northern Territory, the Department of Natural Resources Environment and the Arts funds the Alice Springs Heritage Advisor, who provides a range of services including measured drawings and design work.

In rural and regional areas it is generally sufficient for a visit on a one day a month basis. However, advisors can sometimes be employed to cover a region, servicing a number of shires, requiring greater time input. **In urban areas** there may be a need for more frequent visits, such as one day per week. At the start of any program, it will be necessary to increase the number of visits until the program is established.

4.3 Administration of Services

Heritage advisory services are generally decentralised programs, usually with dollar-for-dollar grant funding provided through the relevant state government agency to councils who engage advisors to visit their area on a regular basis.

Local government is responsible for the day to day running of heritage advisory services and it is essential that the **management system is clearly defined at the outset. The advisor's role** is to advise; councils take responsibility for determining planning applications and considering all factors which may affect an application, including the advice of the advisor. One of the key benefits of the heritage advisory service is the ability to influence the process and outcome through providing pre-application advice.

Close communication is recommended between the advisor and the staff member in charge (eg planner). Successful partnerships between council, council staff and advisors, such as that developed by Bathurst Regional Council and Broken Hill City Council, in New South Wales, are instrumental to the success of the program. It is recommended that a system for filing information is established, to allow easy access by the advisor during visits and a practical reference for council staff between visits. This is a critical step and allows for continuity of service if an appointment changes. It is also recommended that standard reporting systems are established between the advisor and local government staff.

Advisors normally report to one senior officer, in the statutory planning area of council, with council supplying backup office facilities (including appointment books). The advisor may attend committee meetings, particularly heritage advisory committees, and liaise as required with council planners, engineers, community services staff and others. Many very successful advisory services have developed through effective partnerships between council staff and the heritage advisor, where council staff are able to 'carry on' the work of the advisor between visits, and ensure that the advisor's expertise is best utilised to meet council's statutory and strategic heritage management needs.

Council's statutory planning officers should lead pre-application meetings and site visits involving planning permit applications attended by the heritage advisor. If not possible, the role of the advisor and the extent of their role should be clear to all parties. Where resources are limited, council should be advised in writing of pre-application discussions and meetings between the advisor and owners or applicants if a council officer has not been involved. It should be clear to applicants that council officers will consider the heritage advice, together with a possible range of other planning issues, in considering an application.



Heritage Advisors receiving training on traditional timber techniques, Rouse Hill, New South Wales. Graham Fall and James Findlay demonstrating traditional timber skills at the Cumberland Vernacular Symposium on 4 July 2008 presented by the Historic Houses Trust of NSW and the Association for Preservation Technology. Image courtesy Peter Marquis-Kyle at Rouse Hill House.

Written or verbal advice provided by the advisor should respond to the legislative and policy framework of the state and local government area. The advice should be relevant and respond to the specific permit application under consideration.

The heritage advisor can assist to negotiate outcomes where the issues are heritage-based. However, it is not the role of the advisor to attend consultations and other community meetings involving permit applications. The advisor provides independent and impartial heritage advice and it is the responsibility of council's planning officers to resolve all of the relevant issues in determining a planning application.

An important part of the advisor's work is to **promote the council and ensure that the community has adequate access to heritage focused education, management and promotion**. It is recommended that special training sessions are conducted for council staff, local professionals, elected councillors and the community in a range of heritage issues.

It is generally recommended that councils send a **standard letter inviting expressions of interest and an accompanying brief** to three or four consultants (or more in the metropolitan area). Responding consultants provide council with a range of information by which an assessment of their suitability as a potential heritage advisor for the area or region can be made.

4.4 Appointing an Advisor

Heritage Advisor's Skills and Qualities

Four qualities are important in an effective heritage advisor. The full list of essential criteria is outlined in the brief in Attachment 3:

1. adequate knowledge of **conservation policies and practice**, and suitable **experience in heritage conservation work**
2. an ability to provide **practical conservation design solutions**
3. good inter-personal and oral and written communication skills and an ability to actively **promote heritage conservation** through education and management
4. an ability to solve problems and **negotiate acceptable solutions** to issues involving heritage matters where these arise.

New South Wales, South Australia, Western Australia and Victoria all stipulate a range of additional specific requirements and criteria (refer to Attachment 4 for links to templates). All the standard templates emphasise the need for sound theoretical, technical, practical qualities, including good inter-personal, oral and written communication skills. As an advocacy role, the ability to lead, inspire and educate is essential.



Heritage Advisor Donald Ellsmore delivering the Byron Bay Shire Australia Day address at the Brunswick Valley Historical Museum site in Mullumbimby, New South Wales. Image by Robyn Gray on 26 January 2006.

It is also desirable for advisors to possess a holistic understanding of heritage issues, including appreciation of environmental, natural heritage, movable heritage/ collections, environmental design (waste, energy and water saving designs), ethnic and Indigenous issues. It is to be recognised that advisors may require specific skills for certain locations, particularly in rural and regional areas.

It should also be recognised that the advisor may need to recommend or seek other specialist heritage advice as required. These may include indigenous cultural heritage experts, environmental scientists, horticulturalists, arborists, engineers, archaeologists, materials conservators etc. as appropriate to the circumstances.

Most heritage agencies maintain a register or list of consultants with experience in a range of heritage matters and contact can be made with the state heritage authority to obtain names of three or four consultants. Traditionally, advisors appointed to date have been conservation architects, but utilising other appropriate skills and experience has also been successful. A standard Expression of Interest letter is appended at Attachment 5.

Where possible it is recommended that newly appointed heritage advisors attend a specific training course prior to commencement in their position. Western Australia, New South Wales and Victoria have annual training programs for advisors and this allows for new advisors, or consultants considering becoming advisors, to be trained prior to commencement of the job.

4.5 Remuneration

The advisor is paid by the council on a consultancy basis. Remuneration is usually made per visit, either full day or half day (or longer period if necessary), which will be fully inclusive of all expenses. An allowance may be agreed upon between the council and the heritage advisor where distance may require the advisor to undertake extended travel and/or an overnight stay. **Back up services** provided by council – an office, telephone, photographic supplies and possibly local transport – are calculated in the fee structure. Individual state governments will need to determine their own pay rates guideline.

A rate or fee can be agreed upon between the council and the heritage advisor for additional time requested by the council outside the advisor's normal hours, which can be specified in the Letter of Engagement. It is the responsibility of the advisor to provide for all relevant insurances, including professional indemnity and public liability insurance. The council should not be required to pay for workers compensation, superannuation, annual leave etc or any costs in addition to the agreed fees. Councils must be realistic about the demands placed on advisors and balance these expectations against the time constraints of the advisor. The specialist skills of heritage advisors should be remunerated accordingly.

4.6 Restrictions on other work

The standard brief may contain certain restrictions on other work which advisors can undertake in the subject area. These restrictions are designed to avoid any conflict of interest. Generally it is recommended the advisor **not** be a resident of the municipality where they are to work, **nor** have an established practice within the area. The advisor shall inform the council of any possible conflict of interest as soon as this is known. In regional and rural areas it is sometimes not possible to avoid these conflicts and these are clarified at the outset, formal protocols established and permission obtained to practice in the area and operate as an advisor concurrently.

4.7 Involvement of state heritage authority



Heritage Advisor Barbara Hickson on a site inspection for Bathurst Regional Council, New South Wales. Image courtesy Sinclair Croft, Bathurst Regional Council

The heritage agency usually administers the heritage advisory service for the state, provides part funding for services where appropriate and provides training and support services for advisors. Support may include conducting annual meetings, coordinating and managing annual reports from advisors and administering an email network/website for advisors to exchange ideas and facilitate communication. It is beneficial that state support and coordination of the program exists even when local government fully funds services.

In a few cases, the state heritage authority is involved with the appointment of the advisor and determines the fee scale for payment to advisors. Apart from these matters, the program is very much one for local government to administer on a day-to-day basis, with the advisor reporting directly to the council.

4.8 Guideline brief for heritage advisor



Council's Heritage Advisor provided advice on this infill development in Paddington, Architect Tina Engelen, for Woollahra City Council, New South Wales. Image courtesy Louise Thom, Woollahra City Council.

Heritage advisors are commissioned by the employing council, or relevant heritage agency, to work under the conditions and terms of the agreed Brief or Contract. A model brief is included in Attachment 3.

Individual States have also prepared specific guidelines. These include:

- New South Wales – model duty statement included in the 'How to Establish a Heritage Advisory service' guideline – see http://www.heritage.nsw.gov.au/docs/info_HeritageAdvisorService.pdf.
- Victoria – model brief in the Consultancy Brief and Statement of Qualifications and Duties for a Heritage Advisory service. (see <http://www.heritage.vic.gov.au/admin/file/content2/c7/Heritage%20Advisor%20Brief.pdf>)
- Western Australia and South Australia have standard contracts and documents for use in establishing a heritage advisory service which may be obtained from the Heritage Council of Western Australia and Heritage Branch, Department for Environment and Heritage, South Australia.
- For other states, resources available include the standard brief contained in this document. There are also a number of local councils who have established heritage advisory (or heritage officer) schemes – see Attachment 6 for a list of local councils; Heritage Tasmania and the Cultural Heritage Branch of the Environmental Protection Authority, Queensland.

5. Heritage Advisor's Role and Responsibilities

5.1 Introduction

The role of a heritage advisor is broad and complex. The following summarises the role and is to be read in conjunction with Section 4 and the brief in Attachment 3.

5.2 Legislative Framework

It is essential that heritage advisors are aware of the requirements of relevant statutory controls for the local government area and refer to them when providing advice on planning/development applications. Advisors also need to be aware of the broader heritage framework outlined in the following sections:

5.2.1 Heritage Legislation

Heritage advisors will need a clear understanding of current **state heritage legislation**. Each state has legislation providing for the protection of heritage, often focusing on protection of 'State' level heritage, and a Planning Act which affects the identification, protection and development of local heritage, managed by local government. On a day-to-day basis, advisors will predominantly deal with local instruments. However, an understanding of **national heritage legislation** is necessary. A summary of the current Commonwealth and state heritage legislation is shown at Attachment 7.

5.2.2 Local and state government planning provisions

Management of local heritage in each state is generally achieved through the planning system. Local governments are the responsible authority for the vast majority of Australia's heritage, which is protected through statutory mechanism. Heritage advisors, therefore, must be fully conversant with the local instruments or schemes which apply in their area of practice, particularly the status and degree of protection provided for any heritage place.

Statutory protection for local heritage places are afforded by their listing within local planning instruments (planning schemes, local environmental plan, development plan). Schedules to these instruments usually contain the list of protected heritage places.

Heritage advisors must be fully conversant with the schemes which apply in their area of practice, particularly the status and degree of protection provided for any heritage place.

As well as fully understanding state heritage legislation, heritage advisors must be aware of the other related state legislation which affects decisions about the care and management of heritage places. These may include areas such as the natural environment (flora and fauna), indigenous cultural heritage, historic shipwrecks, disabled access and equity, occupational health and safety, and potentially other local government legislation, in addition to planning.



Heritage Advisor Lorraine Huddle meeting with the owner of the Huon Post Office and residence to provide advice on alterations and extensions, for Indigo Shire Council, Victoria. Photo by Jessi Briggs and courtesy Lorraine Huddle, Heritage Advisor.



Heritage Advisor, Barbara Hickson provides advice on rural heritage in Bathurst, New South Wales. Image courtesy Sinclair Croft, Bathurst Regional Council, NSW.

The work of the advisor intersects with broader council environmental management and planning. This includes promoting the inter-dependence and relevance of heritage conservation practice to sustainability; managing heritage impacts of water and energy efficient design; and supporting development applications that propose appropriate adaptive re-use and regeneration of buildings.

5.2.3 Statutory building requirements

A general knowledge of the Building Code of Australia (see <http://www.aib.org.au/buildingcodes/bca.htm>) and other health, safety and building requirements is of assistance to an advisor, who can often obtain help where required on these issues from other council staff.

5.3 Management Framework

5.3.1 Heritage policies and strategies

Much of the work of heritage advisors sits outside the legislative framework. In the majority of cases, it is the ongoing management of places that is more important. This is critically dependent upon community support and the development of proactive approaches to conservation. Advisors work within, and help advise on, strategic management policies for heritage developed by their employer council. The following provides an example of a range of areas where advisors may be required to assist with strategic policy development. While one advisory position may encompass all of these elements, another may have a narrower focus.

Education

- Heritage advice
- Community heritage seminars and workshops
- Heritage walking trails or thematic tours
- Heritage newsletters
- Conservation guidelines
- Training/education of councillors/staff

Heritage Planning

- Pre-application development advice
- Heritage surveys
- Heritage planning instruments and revisions to these
- Guideline documents
- Guidance/planning for council-owned heritage assets



Council's Heritage Advisor, Lorraine Huddle (second from right), at the launch of the Rutherglen Heritage Walk booklet with Indigo Shire Council Mayor Vic Issell (left), Judy Harrison and Ian Stones of the Rutherglen Historical Society and Jenni Cordes of the Café@Rutherglen Wine Experience, Indigo, Victoria. Photo courtesy Lorraine Huddle, Heritage Advisor.

Promotion

- Heritage conservation awards
- Heritage information distributed with rate assessment
- Main street (or similar) program
- Education and interpretation
- Heritage plaques and interpretive signs

Community participation

- Local heritage advisory committee
- Local history centre for building research
- Cultural development programs
- Community consultation
- Volunteering on heritage projects

Financial and other incentives

- Free or subsidised architectural advice
- Local heritage fund assistance
- Waiver of fees for development applications
- Flexibility in planning and/or building requirements
- Rate differential/reduction

Funding

- National/states loans/assistance
- Local Heritage Funds

5.3.2 Recording and Reporting Requirements

The local council is responsible for making appointments for the advisor. The advisor should keep a diary/records to support the preparation of regular written reports after each visit, for presentation to the local council (and the state heritage authority if required).

It is recommended that an **annual report** is presented to the council to provide a comprehensive picture of the scope of the program. Advisors can base this report on each of the specific duties contained in the standard letter of engagement and guideline brief, which provides a performance review of the service. This report should be forwarded to the state heritage authority and may be a requirement for any state government funding. Several states provide templates of standard annual report forms or performance review processes.

5.3.3 Attendance at annual meetings

At a minimum it is recommended that advisors attend annual meetings and workshops to facilitate networking between advisors. Several states have a well developed heritage network which provides an annual meeting of advisors as part of a regular program offering skills development for all heritage professionals. It is recommended that these meetings are facilitated by state heritage agencies.

5.4 Auditing and review of heritage advisory services



Heritage Advisor, Therese Willis provided advice to owners and Council on the redevelopment and restoration of this historic hotel in the City of Norwood, Payneham and St Peters, South Australia. Image courtesy Therese Willis, Heritage Advisor

Regular evaluation of advisory services is essential to their ongoing success. This can be done in two ways: through tabling of an annual report and through an evaluation form. The provision of an annual report allows the local council and the state heritage authority to evaluate the service and the performance of individual advisors.

In New South Wales, a condition of the funding program is that councils must prepare and implement a heritage strategy. The strategy is to be based on the Department of Planning's Heritage Branch publication, 'Recommendations for local council heritage management' (see http://www.heritage.nsw.gov.au/docs/info_recommendations_for_local_councils.pdf) which outlines the key steps required for good local heritage management. The Heritage Branch supplies a template annual report (Local Government Heritage Management Program Summary Heritage Strategy Report for 2006 – 2007) and publishes examples of heritage strategies online. A template annual report for 2008 – 2009 is published at: http://www.heritage.nsw.gov.au/02_subnav_04.htm

New South Wales then collates council reports to provide useful data on local heritage management performance. Collating results from participating local councils, a key finding of the Heritage Strategy Report (see http://www.heritage.nsw.gov.au/docs/summary_report_heritage_strategy_2006_07.pdf) was that the heritage advisor fulfilled 'a vital role in providing timely and effective pre-development application advice'.

Some councils may also choose to evaluate the effectiveness of the service in the local community. A relevant example is the evaluation undertaken by the Ipswich Council (Queensland) where users of the service are surveyed. The 2006 evaluation of the (council funded) Ipswich heritage advisory service found that 97% of customers surveyed rated the service as excellent or good. The evaluation provides the council with information considered necessary for the commitment of ongoing council funding. The questionnaire also promotes heritage trails and invites entry to council's excellence awards in the heritage category. A copy of the questionnaire is appended at Attachment 10.

5.5 Tools to Assist the Advisor

5.5.1 Heritage committees

As a support for the heritage advisor, it is recommended that a heritage committee be established (or incorporated into the role of an existing council committee). This is particularly relevant for regional and rural councils where time between visits by the advisor can be lengthy. A heritage committee is effective if it:

- maximises the effectiveness of advisor's time in the area
- maintains continuity between advisor's visits
- provides a perspective on community issues with input of local knowledge
- establishes a community base, knowledge and understanding of heritage issues and encourages community involvement in heritage initiatives
- strengthens the advisor's position. The heritage committee can provide separate supporting advice on heritage issues
- provides continuity of heritage work and a voice on heritage issues should there be an interruption or discontinuation of the heritage advisory service.

Attachment 9 provides an example of the **framework for a heritage committee** which can be modified and adapted to suit particular circumstances.

5.5.2 Local heritage funds

The establishment of a local heritage fund enables an advisor to offer financial assistance for select heritage projects. These funds are particularly effective in assisting with implementing the upgrade and/or restoration of heritage buildings or areas in local government areas.

Many councils throughout Australia have implemented effective local heritage funds or similar financial incentive schemes to assist with heritage asset management. A local heritage assistance fund can be established as small encouragement grants, dollar-for-dollar grants for heritage projects, or as low interest loans. Loans have the advantage of enabling funds to be made available to assist other projects. Grants have the advantage of being administratively easy and are useful where the applicant has little or no revenue earning capacity. Small grants help with minor conservation works.

Guidance on establishing a local heritage fund is outlined in the New South Wales publication 'How to establish a local heritage fund' (see http://www.heritage.nsw.gov.au/docs/info_localheritagefund.pdf)



Heritage Advisor David Rowe provided advice on Winchelsea Grandstand for the Surf Coast Shire Council, Victoria. Image courtesy David Rowe, Surf Coast Heritage Advisor.

5.5.3 State support for the heritage advisory service program

State heritage authorities may provide additional resources to support the advisory service and the advisors by:

1. managing and promoting a heritage advisory service program.
2. delivering regular training and ongoing skill development for current and future heritage advisors:
 - New South Wales, Victoria and Western Australia all have existing programs for professional development. New South Wales has both an annual training/ refresher workshop and regular heritage network seminar program. Eligibility criteria for an advisor position requires attendance at such events. The Western Australia Heritage Council supports the Regional Heritage Advisory Service which holds regular meetings, provides in house training and supports relevant professional training.
3. providing tools and ongoing support to councils to establish a Heritage Advisory service:
 - A number of states provide standard contracts, briefs and templates; these are summarised in Attachment 2.
 - Publications, frequently asked questions and other flyers for local councils to adapt and use.
4. establishing and supporting a network of heritage advisors:
 - Facilitating regular meetings and communication between advisors
 - Distributing information and advice on heritage management, technical guidance, emerging policies and new initiatives, funding and other incentives to assist advisors continue to develop their skills and knowledge.
5. supporting and funding regional collaboration between advisors through regional heritage advisory services networks:
 - This is successfully operated in New South Wales, for example the Hunter Heritage Network (since 1999) and the Central West Heritage Network (see <http://hunterheritagenetwork.org/> and <http://cwhn.org/>).
6. establishing systems for annual reporting of the implementation of heritage strategies and heritage advisory services
7. promoting and publishing heritage advisory service program successes:
 - Case studies
 - Media releases

6. Benefits of Heritage Advisory Services and Case Studies

6.1 Introduction

The following case studies demonstrate the range of work undertaken by heritage advisors throughout Australia and provide specific examples of tangible benefits to local communities. Many of the following examples of building conservation and adaptation would not have occurred without the input of the heritage advisor, and these buildings would have continued to deteriorate. In some examples, the project would have proceeded but with less appropriate works undertaken on these heritage places.

The case studies show that the provision of free heritage advice has facilitated revitalization of once depressed towns with historic character, giving the area new focus and direction. Many locations within Australia have been assisted in this way and the local economy boosted as a consequence.

While there is no obligation for local councils to participate in heritage advisory services, the economic 'spin-off' from this state government financial investment has been attested to in many areas. The studies demonstrate the breadth of the heritage advisor role in heritage planning, community development, achieving funding applications for heritage projects, solving practical technical problems, encouraging restoration of heritage places, education and facilitating economic development.

The use of heritage advisors to provide initial architectural advice for the conservation of heritage places is extremely cost effective, due to the efficiency of concentrating advice within the one area. The provision of associated financial incentives, such as local heritage funds for conservation works, has also benefited local communities. In some cases it has been quantified as multiplying initial government allocation to these funds by between 11 to 15 times in money spent in the local community.

A range of case studies are also published in the 1997 assessment of heritage advisory services *Heritage Advisory Services: Towards Best Practice* (see <http://www.environment.gov.au/heritage/ahc/publications/commission/books/advisory-services/chapter5.html>).

6.2 Case Studies



Frontage before and after verandah restoration.
 McDougall & Vines (2005)
 'Broken Hill New South Wales - Verandah Program - 1998 - 2005 Summary Program'

CASE STUDY ONE: BENEFITS OF LONG TERM INVESTMENT IN ADVISORY SERVICES

In **Broken Hill**, New South Wales, council's heritage advisory service demonstrates the benefits of a long term commitment to the city and effective working relationships with planning managers and local businesses and residents. Operating for 21 years, the service has a wide remit, with the heritage advisor providing free advice and expertise for the community on all areas of heritage conservation. One of the many achievements of the Broken Hill Heritage Advisory Service (see <http://www.brokenhill.nsw.gov.au/council/1020/1039.html>) is the proactive Broken Hill Verandah Program.

The verandah restoration program has operated since 2000. It was established with funding from the New South Wales government and is now self sustaining as a revolving fund. Council encourages business owners to undertake restoration work to verandahs in the city, providing a low interest loan repayable over four years. Design advice is provided by the heritage advisor for the reconstruction of verandahs. An evaluation of the program and before and after case studies are contained in the '*Broken Hill New South Wales -Verandah Program, 1998 - 2005, Summary Program*', (McDougall & Vines, 2005) published at: http://www.heritage.nsw.gov.au/docs/brokenhill_verandahprogramreport.pdf

"The Broken Hill Verandah Program has been hugely successful. It combines state and local government and the owners in a partnership to build upon the heritage assets within the community. The owner gets many benefits in that it enhances his business and the community has their heritage assets retained and enhanced. It is also great for local government in that it builds up a productive partnership with the community"

Peter Oldsen, Director, Environmental Services, Broken Hill City Council



Infill Development, Geelong.
Image courtesy David Rowe,

CASE STUDY TWO: ACHIEVING APPROPRIATE DEVELOPMENT IN HERITAGE PRECINCTS AND HERITAGE STREETSAPES

A critical role for a heritage advisor is to provide advice on new development within heritage precincts or adjacent to significant heritage listed buildings. Heritage advisors provide essential guidance on infill development such as a new two-storey dwelling in a single-storey streetscape. Much of the work of the heritage advisor is to work with council and applicants throughout the development process to negotiate a successful outcome.

A new two-storey sympathetic development delivering the appearance of a single storey development was achieved in this Geelong Edwardian streetscape infill. The heritage significance, character and appearance of the street were retained, as the area was locally protected. The heritage advisor was involved as part of the planning permit application process.



Former Haymarket Hotel
prior to restoration, 1995 and
following restoration, 2003.
Images Ian Wynd and David
Rowe.

CASE STUDY THREE: SUPPORTING ADAPTIVE RE-USE OF REDUNDANT HERITAGE BUILDINGS

Owners of heritage properties benefit from the expertise and local knowledge of a heritage advisor in providing advice throughout restoration and adaptive re-use projects. At the former Haymarket Hotel in **Geelong**, Victoria, the enthusiastic owners sought to restore and adapt the former hotel to boutique accommodation. The heritage advisor provided advice to the owners on the design and treatment of local hotels, on conservation actions such as retention of original signage and regarding the chemical removal of paint layers to reveal the brickwork. The owners received financial assistance from council in the form of a low interest loan, which was open to applicants undertaking publicly accessible conservation works to listed places. The property opened as a boutique hotel in 2003.



Restoration works at St Mark's Anglican Church, Dromana. Images courtesy Lorraine Huddle.

CASE STUDY FOUR: BROKERING SOLUTIONS TO TECHNICAL PROBLEMS FOR OWNERS

The role of the heritage advisor is broad, reaching beyond heritage planning matters. The heritage advisor's expertise is also sought on the maintenance and repair of historic buildings. Over the past few decades there has been a steady loss of knowledge in the building and design industries about the maintenance of buildings of pre-1950s construction. Consequently, many costly mistakes have inadvertently occurred to buildings refurbished by well meaning owners or custodians in recent times.

At St Mark's Anglican Church, **Dromana** in Victoria, the heritage advisor brought technical experts with historic buildings experience together to solve the problem of the timber floor of the nineteenth century limestone church. The timber floor collapsed due to failure of the sub-floor structure which suffered from lack of adequate drainage and ventilation over a sustained period. Over several decades the external ground level had been incrementally built up to be higher than the internal ground level, and then sealed with concrete paving. At the same time several sub-floor vents were blocked, thus creating a 'swimming pool' effect under the floor.

The poor drainage and ventilation problems were rectified to ensure the building will remain in a safe and durable state for the Church's congregation and future generations. The combined expertise and investigation of the heritage advisor, the church wardens, the builder, building surveyor and engineer, steered the works away from the common 'solution' to put in a concrete floor (which is likely to cause the long term deterioration of the limestone walls). They solved the problem by lowering the internal ground level below the floor, removing the concrete apron and lowering the ground level outside, increasing the number of sub-floor vents and grading the ground level away from the church. The project was made possible by the support and cooperation of the buildings owners for this repair.

CASE STUDY FIVE: UNDERTAKING STRATEGIC HERITAGE PROJECTS

Significant benefits may be obtained from the involvement of heritage advisors in proactive strategic heritage management projects.

In **Southern Midlands Shire Council**, Tasmania, (see <http://www.southernmidlands.tas.gov.au/site/page.cfm?u=280>) the full-time heritage officer undertakes the planning, promotion and implementation of council's heritage projects. This includes the preparation of strategic heritage documents on a range of heritage matters for council including Conservation Management Plans, Interpretation Plans, a heritage collections policy and technical matters, all published online for community access. A current project is the Oatlands Military Precinct Project, including restoration and remedial works to the Oatlands Gaol. The heritage officer has prepared a Conservation Management Plan to guide works and publishes reports on progress and implementation of the conservation works.



Development of the Victorian cottage as a shop saved it from demolition. Image Sinclair Croft, Bathurst Regional Council

CASE STUDY SIX: NEGOTIATING SOLUTIONS FOR OWNERS

In **Bathurst**, New South Wales, owners of a Victorian cottage lodged a development application with council to demolish and build a 'replica' due to significant cracking and foundation movement.

Council's heritage advisor met the owner on site as the cottage was identified as highly significant under the Bathurst Conservation Area Management Strategy, which therefore warranted retention. After discussing options with the owner, the development application was modified to restore the original front four rooms of the cottage with a new addition proposed at the rear. This will result in the retention of the significant façade of the building and roof form which contribute to the streetscape.

While the floor plan of the original cottage will be modified as part of the development, new openings will reflect locations of previous walls so that the original floor plan can still be 'read' and understood. The applicant was also encouraged to apply for funding to re-roof the original cottage and verandah and to restore the wrought iron verandah lacework.

The negotiated solution by the heritage advisor enabled the owners to achieve a desirable development and to seek funding from council for assistance to undertake conservation works. The community will retain a significant and aesthetically pleasing Victorian cottage.

Also in Bathurst, Council refused an application to demolish a Victorian cottage next to a petrol station for a car park area, on the grounds of a detrimental outcome to the heritage streetscape. Council’s heritage advisor negotiated a solution with the owners providing for the shop for the adjacent service station to be relocated into the existing residence, enabling a redevelopment of the remainder of the site. The proposal included the extension of the verandah around the cottage to link it with the service station site and the owner was encouraged to apply for funding for restoration works to the front verandah and the re-roofing of the cottage. This solution will enable expansion of the service station and retention and restoration of the cottage.

CASE STUDY SEVEN: PARTICIPATING IN FLAGSHIP HERITAGE PROJECTS

Two projects in the **Surf Coast** region of Victoria demonstrate the value in community-led or partnership heritage projects in developing broader support for heritage.



Football Pavilion, 2003 and 2007, Deans Marsh. Images David Rowe

The restoration of Winchelsea Grandstand was a flagship heritage project demonstrating the success of a collaborative community approach. The grandstand at the Eastern Reserve, Winchelsea was erected in 1923 as a functional memorial to the people of Winchelsea and district who served in the armed services in the First World War. The restoration of this popular grandstand, long valued by the community, has had a positive flow-on effect for local heritage management. Council officers (the recreation officer and building services coordinator) and council’s heritage advisor worked with the Returned Serviceman’s League, the Eastern Reserve Committee of Management, Heritage Victoria and the community at large on fundraising and on technical and management documentation for the restoration and repair of the building. Corporate sponsorship was achieved from the Bendigo Bank, while the council was also successful in receiving a grant from the Victorian government. The Winchelsea grandstand restoration project culminated in a positive community event to re-open the grandstand for community use, coinciding with the Queen’s Baton Relay visit to Winchelsea.



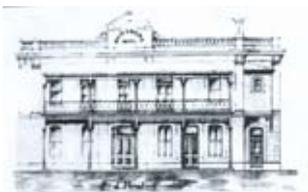
Winchelsea Grandstand, 2005 and 2006. Images David Rowe

Investigation and significance assessment by council’s heritage advisor can often illuminate heritage significance not previously valued. This community project reinforced the success of a partnership approach. Council has since taken up other heritage projects inspired by the success of the grandstand restoration.

At the Deans Marsh Football Pavilion, proposals for the demolition of the pavilion prompted community calls for its retention. Council’s heritage advisor investigated the pavilion’s significance and condition and supported retention. A local community group was successful in applying for a grant to repair and restore the significant heritage place. A \$77,000 grant from the Victorian Government enabled the removal of asbestos cladding, replacement with fibre cement sheeting, replacement of corrugated iron roof and repair of windows and doors.



The Oriental Hotel, South Australia: top, hotel circa 1900; centre, hotel before restoration; and below, images after restoration work in August 2008. Images and text courtesy Therese Willis, McDougall & Vines.



Maid & Magpie Hotel, South Australia, 1884 drawing and photo after restoration work, August 2008. Images and text courtesy Therese Willis, McDougall & Vines.

CASE STUDY EIGHT: NEGOTIATING SOLUTIONS FOR COUNCILS

RESTORATION AND ADDITIONS TO HISTORIC HOTELS

In the **City of Norwood, Payneham and St Peters**, the Oriental Hotel is a listed local heritage place. A two-storey bluestone Victorian hotel, it was designed by James Cummings and constructed in 1881. The hotel had become rundown in past years, with external walls rendered and painted and the first floor balcony removed.

A development application for major internal refurbishment and a new single-storey rear addition was received in 2006. A single-storey addition almost three times the footprint of the original hotel has been constructed at the rear and the new building is contemporary with a flat roof, glazed façade, expressed timber framework in recycled timber and aluminum cladding. The setback and scale of the new addition, together with a well designed connection between the two buildings, enables the original building to retain its distinctive presence on the street corner and refocuses entry from the carpark to the new facilities.

In this case the heritage advisor was successful in negotiating the restoration of the original building externally. This included removal of render and repointing of the bluestone and rendered trim; reconstruction of the first floor balcony, based on early photos; sensitive signage on the main façade and an appropriate color scheme.

The Maid & Magpie is a state heritage listed place located in a busy intersection in the City of **Norwood, Payneham and St Peters**. The hotel is in a highly visible location and is St Peters oldest hotel site; a single-storey hotel building was first licensed there in 1848. The hotel was rebuilt to its present two-storey configuration in 1882, to a design prepared by architects English and Soward. Sometime prior to 1935, the façade was rendered, painted white and the cast iron balustrading removed from the balcony.

A major redevelopment of the hotel commenced in 2006, with staged development applications for internal alterations and upgrading, additions to the side and rear of the building, creation of a new main entry, new street access points and restoration of the historic façade.

Heritage advice was provided throughout the process to ensure that the significance of the place was maintained while allowing appropriate adaptation to create an attractive and high quality dining and entertainment venue.



Teacher's House before and during restoration works. Images Sinclair Croft, Bathurst City Council.

In particular, advice was sought from the heritage advisor on:

- Appropriate screen walling along the street edges
- Reinstatement of the cast iron balcony, based on early drawings
- Restoration of the external masonry walls
- Removal of lean-to additions
- Preservation of significant internal architectural features, including stairways and internal roses
- An appropriate external color scheme

In **Sofala**, in New South Wales, a fire destroyed an old school teacher's residence, leaving only the brick walls standing. In response, the former council considered demolition of the structure to secure the site. Council's heritage advisor prepared a history of the site and Statement of Significance which enabled council to make an informed decision, to take a long term view and leave the remains in situ, pending a new owner. The site soon sold at auction and the enthusiastic new owners, with advice from council's heritage staff, retained the brick structure and have commenced rebuilding the cottage. To date, works have included the re-roofing of the cottage and restoration of the chimneys.

CASE STUDY NINE: PROVIDING THE RIGHT ADVICE TO OWNERS ON RESTORATION WORKS

One of the common tasks of a heritage advisor is to advise owners on the opportunities and methods of conservation and restoration of properties.

The owner of an early Geelong property saw the value in restoring the property, instead of pursuing an expensive demolition and rebuilding task.

Geelong City Council's heritage advisor was able to provide historically accurate advice on the works required to restore this 1883 brick cottage.



1883 brick cottage, before and after restoration. Images courtesy Ray and Jennifer Bantow.

CASE STUDY 10: ADVISORS WORKING ON COMMUNITY EDUCATION AND HERITAGE PROMOTION

The Town of Vincent, Western Australia, has a range of education/heritage promotion programs including:

- Range of plain English brochures for owners, including a glossary of terms and basic concepts such as 'what is heritage conservation'
- A dedicated heritage website, (<http://www.vincentheritage.com.au/?nodeNum=512>) heritage talks and newsletter
- Heritage trails, plaques, interpretation and heritage awards program

Some of the initiatives underway or proposed in the 2007 – 2012 strategy (see <http://www.vincentheritage.com.au/docs/Heritage%20Strategic%20Plan%20September%202007.pdf>) include:

- Establishing corporate/commercial sponsorship of heritage programs
- Economic study of property values of listed places

In the **Southern Midlands Shire**, in Tasmania, the local council has:

- Published online resources on heritage projects, works programs and progress reports on Council's website. Published reports and documents include:
 - Report on the status of the Oatlands Supreme Court project, restoration and interpretation plan (see http://www.southernmidlands.tas.gov.au/webdata/resources/files/State_of_the_Project_2007.pdf). Council obtained a grant from the state Arts department (Arts Tasmania) to interpret the building.
 - Report on the status of the Oatlands Gaol Restoration Project (see http://www.southernmidlands.tas.gov.au/webdata/resources/files/State_of_the_Project_2007_WEB.pdf).
- A Heritage Collections Policy to guide the management of council owned collections (see http://www.southernmidlands.tas.gov.au/webdata/resources/files/Heritage_Collection_Policy_Endorsed_160507.pdf).
- Trade show and free conservation workshop for heritage owners: Restoration Central (see [http://www.southernmidlands.tas.gov.au/webdata/resources/files/RC_brochure_final_\(comp\).pdf](http://www.southernmidlands.tas.gov.au/webdata/resources/files/RC_brochure_final_(comp).pdf)). The workshop supported local owners to engage with tradespeople, contractors and professionals on practical conservation methods.

In **Bathurst**, New South Wales, council's heritage promotion and educational programs, many initiated by the heritage advisor, include:

- Heritage Advisory Service
- Participating in regional network of heritage practitioners, the Central West Heritage Network (see http://cwhn.org/?page_id=2)
- Community newsletter 'heritage update' (see <http://www.bathurst.nsw.gov.au/planning/heritage-management/96-heritage-update>)
- Heritage information in plain English 'Heritage Survival Guide' see http://www.bathurst.nsw.gov.au/images/stories/pdfplanning/heritage_survival_kit.pdf)
- Heritage Trail for central Bathurst
- A heritage strategy (see <http://www.bathurst.nsw.gov.au/planning/heritage-management/94-heritage-strategy>)
- Support for the successful regional Cobb & Co Heritage Trail (see <http://www.cobbandco.net.au/>)
- Funding allocated from council's budget for interpretative signage and heritage brochures
- Heritage Awards held in partnership with National Trust to recognise restoration projects, appropriate additions and infill developments
- Bathurst Region Heritage Fund (see <http://www.bathurst.nsw.gov.au/planning/heritage-management/98-bathurst-region-heritage-fund>)
- Waiving development application fees for painting of commercial buildings and verandah reinstatement projects

In the City of **Norwood, Payneham and St Peters**, in South Australia, council's heritage advisor has been engaged since 1994 and carries out a range of strategic heritage programs including education services and outreach programs for the community; delivering heritage events; delivering interpretation programs including trails, walks and a heritage public art program; community education including newsletter, public seminars and information sessions, and field days. Council produces plain English information to support the heritage advisor role and offers other incentives to residents.

In **Ipswich**, Queensland, the council independently funds a heritage advisory service, produces a free heritage education kit distributed to local schools (see http://www.ipswich.qld.gov.au/community/education/heritage_education/index.php), runs an annual heritage awards event and produces promotional videos and books. Plain English guides are produced for owners' including plain English 'translations' of the local planning scheme, advice on house styles (see http://www.ipswich.qld.gov.au/about_ipswich/heritage/heritage_buildings/house_types/) and frequently asked questions (see http://www.ipswich.qld.gov.au/documents/heritage/frequently_asked_questions.pdf).

CASE STUDY 11: EXPANDING KNOWLEDGE AND MANAGEMENT OF A RANGE OF HERITAGE PLACES - INDIGENOUS HERITAGE, NATURAL HERITAGE AND MOVABLE HERITAGE/OBJECTS/COLLECTIONS.

Heritage advisors can also be instrumental in educating the community about other types of heritage beyond historic heritage. Heritage advisors can promote indigenous and natural heritage management.

In **Bathurst Regional Council**, the Bathurst Regional Council's strategic plan for 2008/0 to 2010/11 (see http://www.heritage.nsw.gov.au/docs/incentives/hs08-11_Bathurst.pdf) includes steps to protect Indigenous and archaeological heritage. The strategy involves undertaking studies of potential Indigenous significance, post-contact and a historical archaeological study of the Bathurst city and other areas of early settlement.

Indigo Shire Council, in rural Victoria, hosts an annual heritage awards event which recognises heritage collections management.

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