

This guide introduces you, as the owner or manager of a heritage place, to the preparation and use of Conservation Management Strategy (CMS).

The guide answers some common questions asked about the purpose, scope and content of a CMS. It also includes the State Heritage Office's CMS standard brief, which you can use to commission a heritage consultant.

What is a CMS?

A CMS is an owner's practical guide to the maintenance of a heritage place. Amongst other things, it contains a Building Condition Assessment Report, conservation management schedule and maintenance schedule.

Why do I need a CMS?

As the custodian of a heritage place, a CMS will provide you with practical information to assist you in the maintenance of your property by providing you with an understanding of its current condition and the necessary actions to be undertaken to ensure that the significance of the place is not lost or compromised.

A CMS is a good property management tool as it promotes effective decisions through the conservation and maintenance schedules for the place.

What does a CMS contain?

The CMS essentially contains four sections:

- Introduction
 - This section provides the basic heritage information about your property such as the Statement of Significance and heritage listings of the place.
- Background information about the building
 - This section provides information about the significance of your property, including a brief history and description of the physical elements of your property.

- Graded zones and elements of significance
 - This section gives you an understanding of the differing levels of significance of zones or elements of your property.
- Recommended conservation and maintenance works schedules.
 - This final section of a CMS is the preparation of an action plan that includes a clear set of work schedules and associated timeframes. It should also provide you with the most up to date information on protocols that need to be followed in regards to undertaking works to your property.

An essential part of the CMS is a Building Condition Assessment Report, which is included as an appendix to the main document. The Building Condition Assessment Report records the condition assessment undertaken by a competent assessor. The condition assessment is a technical inspection to evaluate the physical state of elements and services of your property to assess the maintenance needs.

Condition assessment generally comprises:

- Physical inspection of a building to assess the actual condition of the building and its individual elements and services.
- Identification of maintenance works required to bring the condition of the building and its services to ensure the significance of the building is not lost or compromised by unsympathetic conservation and maintenance works.

- Ranking of maintenance works in order of priority
- Determination by the assessor of actions to mitigate any immediate risk until remedial works

More information about the contents of a CMS is contained in the standard brief of a CMS, which is attached at the end of this information guide. A template for a Building Condition Assessment Report is also attached. If your property is a landscape or garden, the template can be modified to make it relevant.

When can a CMS be used?

A CMS may be used when there is:

- A place of local significance
- A State Registered Heritage Place for which no major changes or interventions are planned in the short to medium term that have the potential to impact on the place
- As an **interim** document for a place undergoing a Government Heritage Property Disposal Process pending the preparation of a Conservation Management Plan

Who prepares a CMS?

A heritage professional with experience in preparing heritage reports will not only bring technical skills but also a network of other specialists. A heritage professional may be an architect, archaeologist, historian, horticulturist or material conservationist. The specialist skill required for a CMS depends on the nature of the place. When seeking the right person with appropriate background, it is best to first look at the major element of your heritage place. Is it a garden or landscape with a few scattered structures? Is it a building or complex of buildings? Is it a ruin? Answering this question will enable you to choose the right specialist group to approach.

Once you have decided upon the most appropriate specialist group, put together a brief that outlines your objectives, needs and aspiration for the place. Include the CMS Standard Brief found at the end of this document. Approach several heritage professionals with your brief and ask for a quote and fee proposal.

It is wise to research a few heritage professionals and evaluate if they demonstrate the right skills and experience that you require. You want to ensure that you get value for money and this does not necessarily mean the cheapest quote. Look for professionalism and attention to detail.

You should also assess suitability against your needs and budget.

How do I use a CMS?

A CMS is essentially a management tool and provides practical guidance to the required conservation and maintenance works to be undertaken to upkeep your property. Use the CMS as a planning tool to map out an action plan for your property.

As a priority, you should read through the CMS thoroughly and understand the information contained within it. The next step is to undertake the actions as set out in the works schedules.

A Conservation Management Strategy (CMS) is a practical tool for the continued maintenance of a place of heritage significance. The main objective of the CMS is to equip the owner with the information that will assist in the conservation of the place.

The CMS should be presented in a manner that is suitable for use by owners and managers of heritage places, conservation practitioners, approval authorities and advisory bodies.

This standard brief provides an outline of the sections and information to be included when preparing a CMS.

In general, the work should be carried out in accordance with the principles of the *Australia ICOMOS Burra Charter*, 1999¹ or *The Illustrated Burra Charter*². Reference should be made to the *Guidelines to the Burra Charter: Procedures for undertaking studies and report*. The document should also be produced in accordance with *Style Manual for Authors, Editors and Printers*, 2002³. *The Australian Natural Heritage Charter: Standards and Principles for the Conservation of Places of Natural Heritage Significance* should also be used when relevant.

CMS SHOULD INCLUDE THE FOLLOWING SECTIONS:

1. INTRODUCTION

The introduction should include:

- purpose of the Conservation Management Strategy.
- description of the place.
- the Statement of Significance.
- a location plan showing the regional (broad) context of the place, a location plan showing the local context of the place, and a clearly defined site plan annotating all buildings and features on site and defined curtilage or boundary for the place.
- current heritage listings of the place.
- acknowledgements of people and funding as appropriate.

2. BACKGROUND INFORMATION ABOUT THE PLACE

For a place on the State Register of Heritage Places, Heritage Council's Assessment Documentation should be reproduced in its entirety. The source document and the original authors should be clearly acknowledged.

If the place is not on the State Register of Heritage Places, this section should include a brief overview of the history of the place with a clear statement that further research is required for a better understanding of the place.

1 The Australia ICOMOS Charter for Places of Cultural Significance (The Burra Charter), 1999.

2 Marquis-Kyle, P. & Walker, M., *The Illustrated Burra Charter*, Australia ICOMOS, 2004.

3 Australian Government Publishing Service, revised by Snooks & Co., *Style manual for authors, editors and printers*, 6th Edition, John Wiley & Sons, 2002.

3. GRADED ZONES AND ELEMENTS OF SIGNIFICANCE

The purpose of this section is to identify zones, sections and elements of the place that have varying degrees of significance. The graded levels of significance should be presented graphically with various zones and elements easily distinguishable.

Generally, a three tier grading system is used to identify all parts of the place:

- Primary significance.
- Secondary significance.
- Intrusive (detracts from or has an adverse affect on the significance of the place).

4. CONSERVATION WORKS AND MAINTENANCE SCHEDULES

This section should identify the works required for the conservation and maintenance of the place. The information from the Building Condition Assessment Report should be used to determine the urgency of the works. The works are to be collated into schedules that clearly set out timeframes and priorities for each activity.

4.1 RECOMMENDED CONSERVATION WORKS SCHEDULES

Works that are required to address issues identified in the Building Condition Assessment Report should be outlined in a schedule that establishes the sequence of activities to be undertaken in response to priorities.

Works should be categorised into 'urgent works' (to be actioned within 12 months); 'short-term works' (within two years); 'medium-term works' (within five years); 'long-term works' (within 10 years); and desirable works.

4.2 RECOMMENDED MAINTENANCE WORKS SCHEDULE

Other than conservation works, the CMS should also address ongoing maintenance works for the place. A schedule of maintenance works should be drawn up to ensure that upkeep of the place is programmed.

5. APPENDICES

Any information that may be critical to an understanding of the CMS or its preparation should be included as an appendix. For documents available online, a web address will be sufficient. Appendices should include the Building Condition Assessment Report in full.

Building Condition Assessments are technical inspections undertaken by a person with relevant training and qualification such as an architect or structural engineer. The following template should be used in the preparation of a Building Condition Assessment Report.

BUILDING CONDITION ASSESSMENT REPORT

Place Name:

Place number:

Address:

Date of inspection:

General observation of the place:

BUILDING/ ROOM/AREA DESCRIPTION	CONDITION RATING	DEFECT LOCATION	WORK TO RECTIFY DEFECT	PRIORITY RANKING
(e.g. Bedroom 1)	(e.g. B)	(e.g. Lath and plaster ceiling in the north east corner showing signs of damp)	(e.g. Locally repair ceiling with like for like material)	(e.g. 2)

Condition rating codes:

RATING	STATUS	DEFINITION OF RATING
A	Excellent	<ul style="list-style-type: none"> No defects. As new condition and appearance.
B	Good	<ul style="list-style-type: none"> Minor deterioration. Superficial wear and tear. Major maintenance not required.
C	Fair	<ul style="list-style-type: none"> Damaged. Worn finishes require maintenance. Services are functional but need attention.
D	Poor	<ul style="list-style-type: none"> Failed but retrievable. Badly deteriorated. Potential structural problems.
E	Very Poor	<ul style="list-style-type: none"> Failed and not retrievable. Not operational. Unfit for occupancy or normal use.

Priority ranking scale:

PRIORITY RATING	STATUS	DEFINITION OF RATING
1	Immediate attention	Works required to prevent serious disruption of activities and/or may incur higher costs if not addressed within 1 year.
2	Urgent	Works that need to be addressed between 1-2 years to prevent serious deterioration.
3	Medium term	Works likely to require rectification within 3 years.
4	Long term	Works that can be safely and economically deferred beyond 3 years.