



Guidelines for the Submission of **HERITAGE ASSESSMENT REPORTS** with Development Applications

June 1995 – File 95/2022

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AIMS OF GUIDELINES

The aims of these guidelines are:

- a. to conserve the environmental heritage of the City of Shoalhaven; and
- b. to integrate heritage conservation in the planning and development control process; and
- c. to ensure that new development is undertaken in a manner that is sympathetic to and does not detract from the heritage significance of certain items and their settings, as well as streetscapes and landscapes, and the distinctive character that they impart to the City of Shoalhaven.
- d. to provide assistance in detailing the requirements for information which is required to be submitted with development applications for development involving an item of environmental heritage, or for development located within an identified heritage area.

INTRODUCTION

These guidelines outline the requirements for development applications, involving items of environmental heritage, or land which is located within the vicinity of an item of environmental heritage, or within an identified heritage precinct. Such development applications are required to be accompanied by a Heritage Assessment Report.

Where properties are affected by Interim or Permanent Conservation Orders pursuant to the provisions of the Heritage Act, 1977, prior to seeking development consent it is necessary that approval be sought from the Heritage Council of NSW pursuant to the provisions of Section 60 of the Heritage Act, 1977.

Note: These guidelines have been prepared having regard to the “Australian ICOMOS Charter for the Conservation of Places of Cultural Significance (Burra Charter)”, and guidelines, State Heritage Inventory Guidelines prepared by the Department of Urban Affairs and Planning, and the National Trusts publication ‘The Conservation Plan’ (prepared by Dr. Jim Kerr).

Values of significance such as Aboriginal or Natural are required to be considered, however, fall outside the scope of these guidelines.

DEFINITIONS

Place means site, area, building or other work, group of buildings or other works together with associated contents and surrounds.

Cultural significance means aesthetic, historic, scientific or social value for past, present or future generations.

Fabric means all the physical material of the place.

Conservation means all the processes of looking after a place so as to retain its cultural significance. It includes maintenance and may according to circumstance include preservation, restoration, reconstruction and adaptation and will be commonly a combination of more than one of these.

Maintenance means the continuous protective care of the fabric, contents and setting of a place, and is to be distinguished from repair. Repair involves restoration and reconstruction, and it should be treated accordingly.

Preservation means maintaining the fabric of a place in its existing state and retarding deterioration.

Relic means any deposit, object or material evidence:

- a. which relates to the settlement of the area that comprises New South Wales, not being aboriginal settlement; and
- b. which is 50 or more years old.

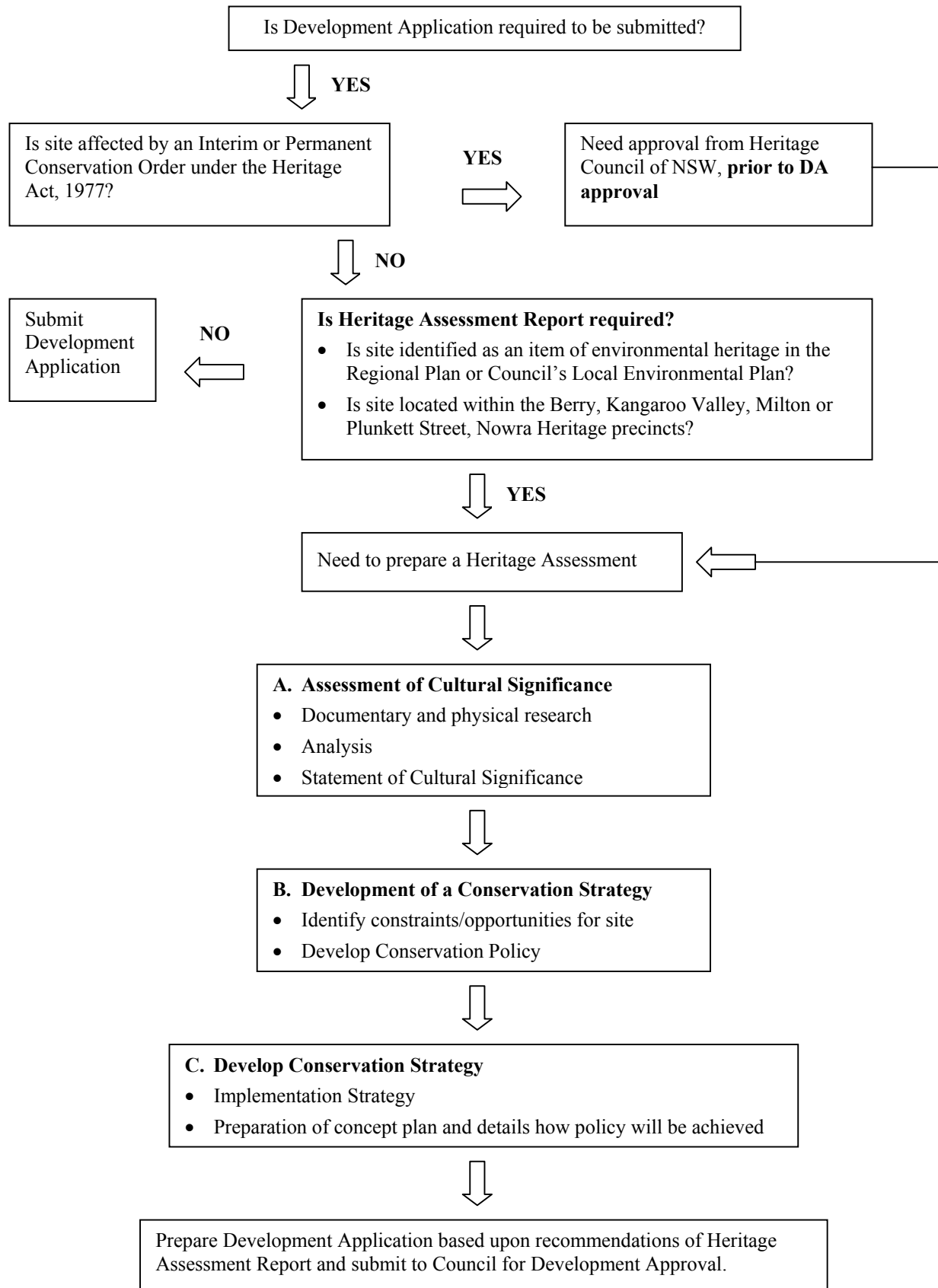
Restoration means returning the existing fabric of a place to a known earlier state by removing accretions or by reassembling existing components without the introduction of new material.

Reconstruction means returning a place nearly as possible to a known earlier state and is distinguished by the introduction of materials (new or old) into the fabric.

Adaptation means modifying a place to suit proposed compatible uses.

Compatible use means a use, which involves no change to the culturally significant fabric, changes, which are substantially reversible, or changes, which involve minimal impact.

OVERVIEW OF PROCESS



WHEN IS A HERITAGE ASSESSMENT REPORT REQUIRED?

A Heritage Assessment Report is required to accompany any development application which involves:

- i. alterations, additions, demolition, or the redevelopment of items of environmental heritage as listed under the provisions of Shoalhaven Local Environmental Plan, 1985.
- ii. alterations, additions, demolition, or the redevelopment of items of environmental heritage as listed under the provisions of the Illawarra Regional Environmental Plan No.1.
- iii. alterations, additions, demolition, or the redevelopment of items which are affected by an Interim or Permanent Conservation Order pursuant to the provisions of the Heritage Act, 1977.
- iv. the development of land which adjoins or is located within close proximity of an item of environmental heritage as indicated under the provisions of Shoalhaven Local Environmental Plan, 1985, the Illawarra Regional Environmental Plan No.1, or is an item affected by an Interim or Permanent Conservation Order pursuant to the Heritage Act.
- v. the development of land within the heritage study areas of Berry, Kangaroo Valley and Milton or within the area affected by Development Control Plan No.10 – Plunkett Street, Nowra. Diagrams in Appendix 1.
- vi. the development of land which will involve the excavation or disturbance of a relic.

Heritage Assessment Reports may not be required where development proposals involve the occupation of an existing building, or where no or only minor alterations are proposed. In this regard, it is suggested that discussions should take place with the Area Planner to determine if a Heritage Assessment Report is required.

WHAT IS REQUIRED FOR A HERITAGE ASSESSMENT REPORT?

The fundamental importance of a Heritage Assessment Report is that it establishes the significance of a place (including a building,

landscape or an item), prior to any proposal that may affect that significance, being considered.

A Heritage Assessment Report need not be overly long (several pages may be adequate in many cases, depending upon the scale of the development, and the nature or significance of the item of environmental heritage). A Heritage Assessment Report however, should adhere to the following format:

A. Assessment of Cultural Significance

The first component of the report should be an assessment of why a particular place (including work, modified landscape, building, relic or other structure) is of cultural significance.

The analysis of cultural significance of a particular place will involve the following steps, and will provide a **Statement of Significance**.

1. Documentary Research

This involves an outline of the investigation of **primary** and **secondary** sources, which must be fully referenced.

Primary sources include: early plans, drawings, photographs, land title information, contemporary newspaper articles, government correspondence, minutes reports, or contemporary directories or family papers.

Secondary sources include: oral histories or information from previous owners, occupants or people associated with a particular place, local histories, registers or catalogues, or other publications, all of which require critical assessment as to their accuracy.

This research is necessary before any reasonable assessment of the significance can be made. Sources for this information may include, existing Heritage Studies, which have been undertaken for certain areas within the City, Local Historical Societies, and/or the Local Library/Council Archives.

2 Physical Research

Involves investigating the fabric of a place to help determine its physical evolution and integrity to any particular historical period.

3. Analysis of Documentary and Physical Research

The findings of steps 1 and 2 are then discussed in the report and subjected to comparative analysis with other places of similar characteristic. The

extent of comparative analysis for the place on a local, regional, state or national basis should be defined. Such details may be ascertained from existing heritage studies which have been undertaken both within the locality, or those which have been done on a regional scale.

4. Statement of Cultural Significance

The significance of a place is then stated. Firstly, assessed under a range of values (where applicable) as follows:

- Aesthetic value
- Historic value
- Scientific value
- Social value

Secondly, comparative values such as:

- Rarity
- Group value
- Landmark value
- Representative value
- Integrity

are also assessed and stated in the Statement of Significance.

Finally, the Statement of Significance should give an indication of the level of significance if comparative information is known. This may assist in future management decisions for the place.

The levels of significance pertaining to a place include:

- Significance to the local area, ie. Local Significance
- Significance to the regional area, ie. Regional Significance
- Significance to the nation, ie. National Significance.

B. Development of a Conservation Policy

Upon completion of the analysis of the cultural significance, a conservation policy is required to be developed which outlines recommendations for the future management of a place.

In compiling a conservation policy, all available constraints (ie. factors influencing the place) and opportunities for the place are examined.

Constraints will include those arising from:

1. the significance of the place;
2. the physical condition of the place;
3. the external factors eg. legislative requirements, Council code requirements, community expectations, public access, security, services, non-statutory heritage requirements, climate, location, etc.
4. the applicants requirements for the place.

For item 1 above, ranked zones of significance may be established for the place (including interiors, exteriors as well as the curtilage of the site) which use as criteria, points including integrity, historical, social, scientific or aesthetic value, to help prioritise intervention and assist with the future decisions on the place. This should be considered for each individual instance to determine if appropriate. For example the facade of a building may be significant both in terms of its heritage value as well as aesthetics, whereas the remainder of the building may not be as significant. This provides a basis upon which decisions can be made regarding the redevelopment of a site.

Having analysed all of the above, the next step is to state the conservation policy for the place and address the following issues:

- Fabric and setting;
- use;
- interpretation (ie. the conservation policy should identify appropriate ways of making the significance of the place understood consistent with the retention of that significance);
- management;
- control of intervention in the fabric;
- constraints on investigations (ie. difficulties in obtaining information);
- future developments;
- adoption and review.

C. Development of Conservation Strategy

Following on from the assessment of the cultural significance, and the development of a conservation policy, it is necessary to provide an implementation strategy. This involves formulating a strategy (ie. a proposal) for implementing the conservation policy.

The implementation process may involve the preparation of a concept plan and should provide substantial detail in describing how the policy is being achieved.

This may include a detailed schedule of works and specifications for a particular use of the place, and detailed action plans for interpretation, management, future maintenance, security etc.

WHO CAN CARRY OUT A HERITAGE ASSESSMENT REPORT?

A Heritage Assessment Report can be carried out by those persons listed on Council's register of suitably qualified consultants, or alternatively by a person or persons who may be eligible for inclusion on the register. Credentials for inclusion on the register include a background in carrying out past heritage assessments.

Overall the skills required to carry out such a report are not common. It cannot be assumed that in all circumstances, any one practitioner will have the full range of skills required to assess cultural significance and prepare the report. Sometimes in the course of the task, it will be necessary to engage additional practitioners with special expertise, such as landscape architects, heritage architects, town planners or historians.

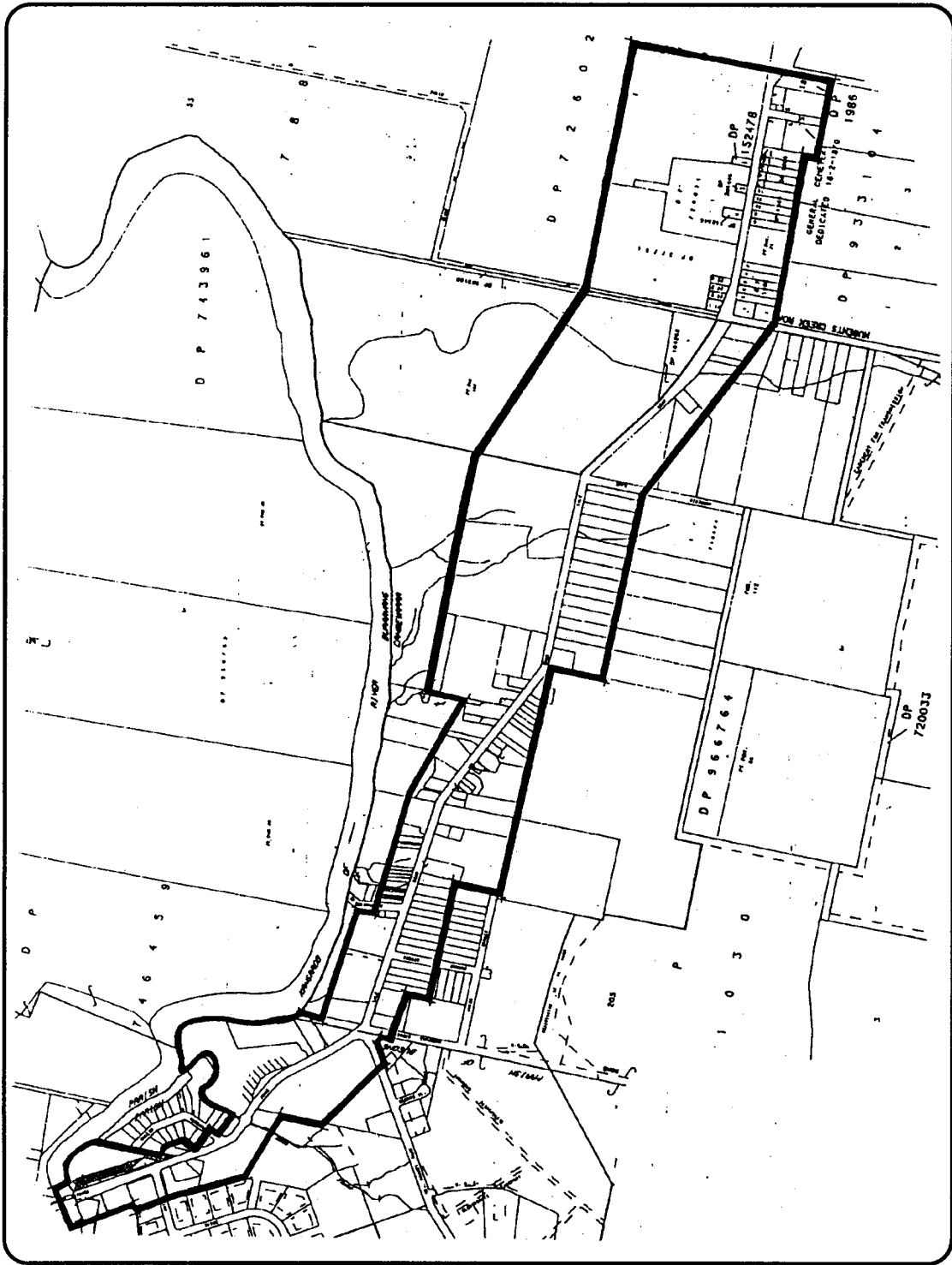
HERITAGE ADVISORY SERVICE

Council is also currently offering a **free** heritage advisory service on a one-day-per-month basis. This service offers advice from an architect, qualified in heritage matters, on issues related to the development of heritage items.

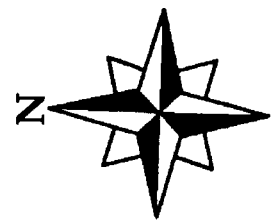
This service however, is of a preliminary nature only, and does not extend to the preparation of heritage assessment reports, or the assessment of development applications.

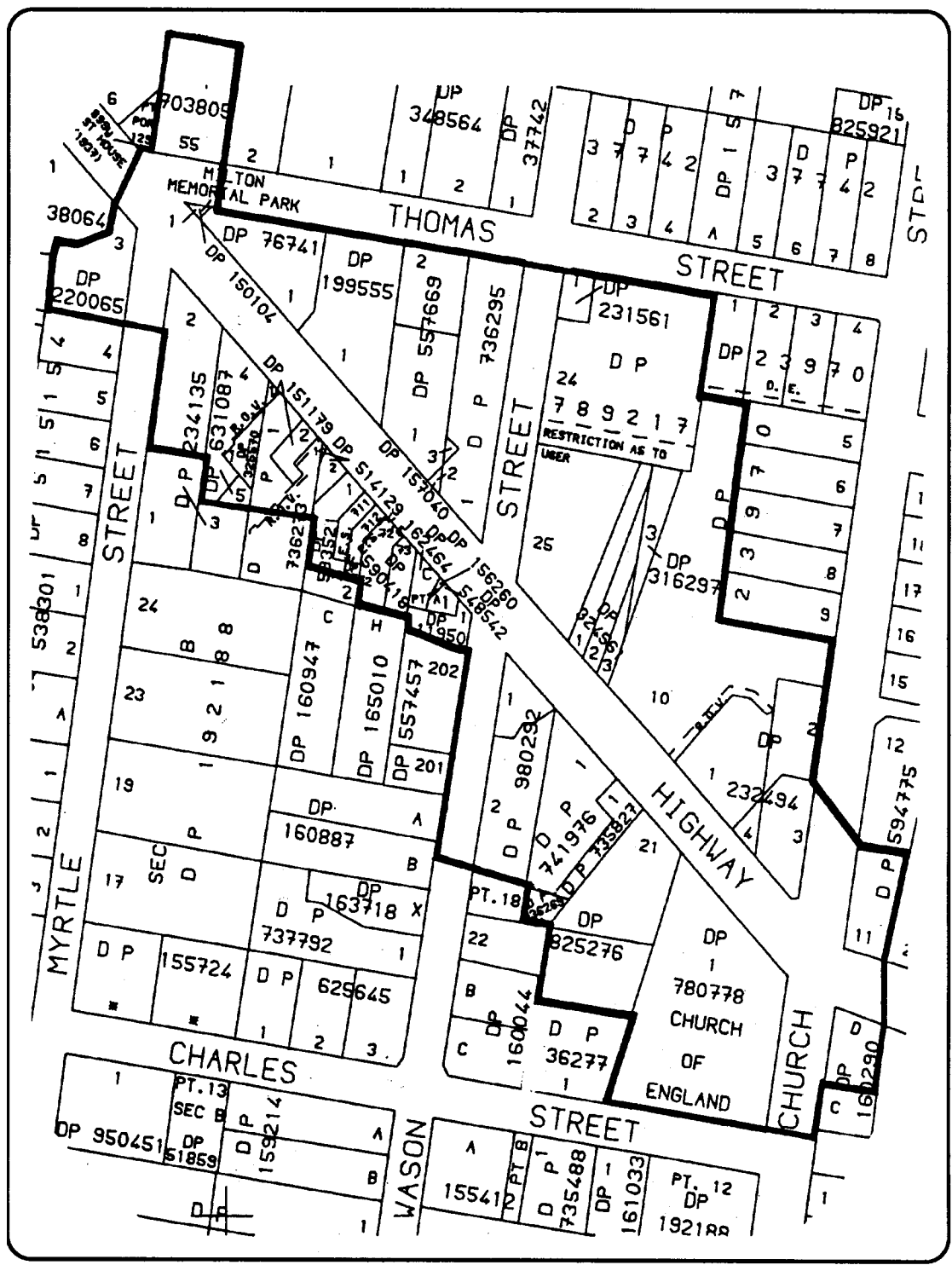
FOR FURTHER INFORMATION

For further information, all enquiries should be directed to Council's Development and Environmental Services Group.



KANGAROO VALLEY





MILTON

