

# Review of the Heritage Studies Program

for  
The Heritage Council of Victoria

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Contents	Page
1. Summary	1
2. Conclusions and Recommendations	6
3. Geographic Coverage	11
4. The Six Studies Review	17
5. Discussion with Key Informants	29
6. Discussion of Particular Issues	35
Appendices:	41
1. Current Status of Heritage Studies	
2. Key Elements of the Studies Brief	
3. Consultant and Client Questionnaire Outline	



# 1. Summary

## Objectives

The objectives of this review are:

1. To identify which areas of the State require a new heritage study, or a review of an existing heritage study.
2. To establish whether the current heritage study brief results in satisfactory heritage studies and if not, why not?
3. To establish whether the heritage studies are able to be translated satisfactorily into Heritage Overlays.
4. To establish the track record of the translation of studies into Heritage Overlays.

## Approach

The approach used to meet these objectives was:

1. Preparation of a list of all municipalities in Victoria indicating:
  - All heritage studies known to Heritage Victoria that cover all or parts of the municipality
  - The extent to which these studies have been implemented through inclusion of the recommendations in amendments to the Heritage Overlay
  - The area of the municipality that still requires to be covered by a comprehensive heritage study.
2. Examination of an agreed selection of six heritage studies and discussion with the consultants and the council project officers responsible for their implementation. The selected studies were:

<b>Consultant</b>	<b>Area</b>
Context	Yarra Ranges
Graeme Butler	Mornington, Hastings
David Moloney/Vicki Johnson	Bulla
Allom Lovell	Swan Hill
Rowe/Huddle	Outer Geelong
Andrew Ward	Monash

3. Interviews with key stakeholders and other consultants.

## Coverage and Implementation of Municipal heritage Studies

The list of heritage studies and their current status is provided at Appendix 1. This list and the analysis indicate that there is now extensive coverage of heritage studies across Victoria. Discounting Stage 2 studies that are underway or nearing completion, of the State's 79 municipalities, only 19 require extensive study and a further 6 require coverage of some smaller areas of the municipality.

The record in terms of implementation is also encouraging. While many amendments are currently in preparation or going through the amendment process and while there are a number of deficiencies in the extent of places covered in a number of areas, currently only six councils have shown a reluctance to implement their studies.

Nevertheless this extent of implementation has taken considerable time in some cases and there are indications that rural councils have difficulty in accessing the specialist skills and officer time to undertake major heritage amendments.

Table 1 shows the municipalities that are still in need of extensive studies as well as those where parts of the amalgamated LGA has not been subject to a heritage study.

Table1: Areas requiring further study

<b>Requirement</b>	<b>Complete Study</b>	<b>Stage 2</b>	<b>Part of LGA</b>
Alpine		<b>x</b>	
Ararat	<b>x*</b>		
Baw Baw	<b>x*</b>		
Benalla			<b>x</b>
Corangamite	<b>x*</b>		
Gannawarra	<b>x</b>		
Glenelg		<b>x</b>	
Golden Plains		<b>x</b>	
Greater Bendigo			<b>x</b>
Hindmarsh	<b>x</b>		
Horsham	<b>x</b>		
Latrobe	<b>x*</b>		
Mansfield	<b>x</b>		
Mildura			<b>x</b>
Moira		<b>x</b>	
Moorabool			<b>x</b>
Mount Alexander			<b>x</b>
Murrindindi	<b>x</b>		
Pyrenees			<b>x</b>
Strathbogie	<b>x</b>		
Towong		<b>x</b>	
Wellington		<b>x</b>	
West Wimmera	<b>x</b>		
Wodonga		<b>x</b>	
Yarriambiack	<b>x</b>		
<b>Total</b>	<b>13</b>	<b>7</b>	<b>5</b>
<b>Cost per Study</b>	<b>\$ 140,000</b>	<b>100,000</b>	<b>Varies</b>
<b>Total Cost</b>	<b>\$ 1,680,000</b>	<b>700,000</b>	<b>390,000</b>
<b>Grand Total</b>	<b>\$</b>		<b>2,770,000</b>
*Extensive studies required where studies exist for only small parts of the LGA			

The first column shows the LGAs that require the equivalent of a full Stage 1 and Stage 2 study although it does include some LGAs that already have studies of small parts of the area. The second column shows LGAs where a Stage 1 study is underway or completed but where no funding has been allocated for Stage2.

The table also provides a broad estimate of the total cost of completing geographic coverage of heritage studies and indicates that a total of \$2,770,000 will be required to complete coverage. Rural councils usually contribute around \$20,000 for each

stage of a study and this would reduce the departments funding requirements by \$500,000 to \$2,270,000.

At the present rate of funding for heritage studies of around \$300,000 pre annum, it will take up to eight years to fund completion of the coverage of the State.

### **Review of the Six Studies**

The review of the six studies addresses the following topics:

Types of Place Covered

The Role of the History

The Consultation Process

Resources and Documentation

Other recommendations and further work

Usefulness of the Product

Implementation

Comments on the Standard Brief

#### Types of Place Covered.

All studies covered a wide range of types of place and the consultants had a good understanding of the range that might be expected.

Some studies did not address broadacre landscapes, and where these were addressed they have not been taken up in amendments to the planning scheme. This is partly because of uncertainty as to how best to protect these areas in the planning scheme.

Few consultants included sites of archaeological potential unless they were associated with significant above ground remains. One study that addressed this place type seriously used historic maps to identify sites. An other study that used the historic map approach found it very time consuming and the exercise was abandoned. Three of the studies made recommendations for the Heritage Inventory.

#### The History

There was complete agreement that if the history was to be useful, it needed to be integrated with the study process in a reiterative process. The field survey and the consultation about places needed to inform and focus the history as much as the history informed the identification process. In this respect some felt that the brief was too prescriptive in requiring the history to predate the survey.

#### Consultation

While the need for public consultation was accepted, most consultants did not find the process particularly useful and meetings were often not well attended. By contrast, discussions with and information from historical societies and key informants was regarded as crucial. More guidance from the brief as to what was expected from the consultation process was requested.

#### Resources and Documentation

Two of the studies adopted an unconventional approach to listing places in the report and this gave rise to difficulties in looking up places in the report. Most studies used the convention of listing places alphabetically by locality followed by street name and number. With the requirement for future studies to use a common data base any anomalies should be an issue for past studies only.

Mapping places posed a problem for most consultants largely due to a lack of suitable base maps with the necessary information. One study did not map significant

places at all, and in two cases consultants commented that adequate base maps were supplied too late to be of use during the study.

In five studies the resources to undertake the documentation of places identified as significant were found to be inadequate. In three of the studies this dilemma was primarily solved through a great deal of unpaid work. With the other three studies, while extra work may well have been involved, a reduction in the scope of the documentation was negotiated with the client. This involved limiting documentation to particular types of places or places of greater significance or under greatest risk. In no case did the consultant believe that all places of post contact cultural significance had been identified and documented.

In all cases the client was reasonably satisfied by quality of the documentation that was undertaken, in some cases very satisfied, although there has been criticism from some panels in this regard.

#### Other Recommendations and Further Work

All studies met the requirement of the brief regarding recommendations for heritage management in the municipality. The most important of these recommendations are those relating to further work as this provides the key to understanding what gaps remain in documentation and the resulting Heritage Overlay.

#### Usefulness of the Product

With the qualifications referred to above regarding the extent of documentation, clients and other consultants and stakeholders find that the studies generally provided a good basis for preparing amendments, making submissions to panels, answering enquiries and assisting in the assessment of planning applications. Two of the studies were considered exemplary in that regard by the client. However it was recognised that there was considerable variation across the range of all existing studies and some panels have been particularly critical of the quality of historical research used to justify the inclusion of places in the Heritage Overlay. These problems appear to arise from inadequate resources to document places to the expected standard and the way individual consultants have responded to this difficulty rather than to deficiencies in the brief.

#### Implementation.

Five of the studies reviewed have either been implemented in part, or are going through the amendment process and one is being reviewed as part of the process of preparing an amendment.

With the possible exception of the Geelong Outer Areas Study, which is being implemented in stages, none of the amendments, including one still in preparation, reflect the full extent of heritage places identified in the study process.

In Yarra Ranges and Mornington only those places that have been documented have been processed leaving a large number of places requiring further work.

Some precincts in the Monash Study were rejected by the panel but have now been reviewed.

It is not proposed to include the broadacre historic landscapes in Bulla due to uncertainty about applying the Heritage Overlay to these sites.

At Swan Hill the Council has acceded to most objecting submissions, including those relating to a major precinct, prior to the matter going to a panel.



### Comments on the Standard Brief

Most respondents considered the standard brief a useful and workable document. The greatest concern was the expectation it could be said to create of what can be achieved for the available budgets. More guidance however was sought on what was expected of the consultation process; on how assessment against AHC criteria is to be undertaken and on how policies for precincts should be structured.

### Other Comments

These included:

- The requirement to map places is too onerous
- The recommended data sheet is too complex
- Database integration is supported
- Arbitrary nature of the municipal area can be meaningless for the thematic history
- Find Stage 1 plus Stage 2 approach inefficient
- Dialogue between consultants would be useful – perhaps workshops like the advisors workshops?

### **Comments by other Consultants and Key Stakeholders**

With some exceptions respondents generally agreed that the studies provided a good basis for Heritage Overlay amendments but suggested the product had been quite variable. The idea that the brief should require the identification of all places of cultural heritage significance and that rigorous assessment is required in stage 2 was agreed to be an admirable goal although it was accepted that this would not always be achieved.

The average estimated cost of documenting a place at between \$300 and \$500 was endorsed but the additional point was made that large and complex sites required much more attention.

There was support for an integrated state-wide database, although not necessarily as currently required by Heritage Victoria.

There was also a call from some consultants for more typological studies, which raises the question about the role of the current typological studies and how this information might or might not be integrated into current area based studies.

The comments of most concern however relate to the adequacy of historical research on places in current studies which has been extensively canvassed in some panel reports. These concerns are discussed in Section 6 'Discussion of Particular Issues'.



## 2. Conclusions and Recommendations

### **Conclusions**

#### Further Studies Required

Twelve of the State's municipalities require a complete heritage study, seven require a Stage 2 study and six require part of the LGA to be covered by a new study. The cost to the Department if funded on the current basis is estimated at around \$2.3 million.

Estimating those studies that need to be reviewed is more difficult. The List at Appendix 1 indicates that most older studies have been reviewed so the issue is not so much the review of older studies, but the completion of the documentation of existing studies, old and new. Of some concern is the extent to which the quite reasonable reduction in the scope of Stage 2 studies has been negotiated with clients and the overall effect this is having on the effective coverage of heritage protection across the State. Nevertheless the six studies review suggests that a number of councils have programs in place to address these gaps over time, and it is suggested that all councils be encouraged to adopt a maintenance view of their Heritage Overlay and consider updates and gap filling documentation as part of their regular program

#### Is the Current Heritage Study Brief Satisfactory?

The Standard brief appears to be performing well in setting the basis for satisfactory heritage studies, but it should provide further guidance on:

- the extent of work that can be expected
- what is expected of the community consultation process
- how the AHC criteria are to be addressed
- on an approach to prioritising documentation in Stage 2 and
- on a standard approach to the structuring of local policies required for heritage precincts.

The range of types of places being covered in the studies is generally satisfactory but the effective identification of places of archaeological potential seems to require an approach such as the use of historic maps which consultants find excessively demanding in the light of their perceived priorities. More guidance should be offered on the provision of planning scheme protection for broadacre landscapes.

#### Can studies be satisfactorily translated into Heritage Overlays?

There appear to be two main obstacles to the successful translation of heritage studies into the Heritage Overlay.

1. The extent and quality of the documentation
2. The lack of experience (and professional time) available to councils to deal with the complex heritage amendment process.

The issue of adequate documentation is both quantitative and qualitative. As discussed above, the inability of even the more generous budgets of recent years to provide for documentation of all places recognised as significant in Stage 1 means that the exercise must be circumscribed in some way. Limiting the number of places to be documented should go a long way to resolving the quality issue. But the issue as to what is to happen to those places that fall by the wayside needs to be resolved. Are there smarter ways to prioritise the work in Stage 2 other than simply looking at fewer places or a smaller geographic area?

On the basis that the ultimate goal is, in most instances, to achieve coverage by the Heritage Overlay, some consultants have suggested limiting the work by avoiding researching any places within precincts individually.

It might be possible to extend this principal to individual places if these places share a common reason for their significance. Relatively rare elements in a municipality such as early homesteads might share a common history and statement of significance based on their significance as expressed in the thematic history.

Whatever course of action is practical it seems inevitable that a strict prioritisation process will occur for Stage 2 Studies. It is therefore very important that the decisions taken and the criteria adopted are carefully documented, leaving a very clear understanding of what will need to be done at a later stage.

Most current and future studies are being undertaken in rural areas, and the process of undertaking the amendment process will often be quite new to staff who are already stretched dealing with their day-to-day responsibilities. As this is a crucial stage in the studies program, consideration might be given to funding consultant assistance to undertake a Stage 3 of the study process.

#### What is the track record of translation of studies?

Based on both the review of the six studies and the status list of studies across the state, the track record is encouraging with the qualification that there are a number of places of local significance which have never reached the Heritage Overlay. This is a concern and councils need to be encouraged to continue this work.

#### **Recommendations**

1. The current policy of giving funding priority to new studies to complete the geographic coverage of heritage studies across the State is supported and funding should continue at the current level, but consideration should also be given to encouraging councils to document places of local significance which are not yet protected in the planning scheme.
2. The study brief should be amended to provide clearer guidance on:
  - What is expected from the consultation process
  - Assessment against AHC criteria. Should this be retained and if so how should it be addressed?
  - Provide guidelines for the structure of local policies
  - Provide guidelines for prioritisation of the documentation of places in Stage 2.
3. The study brief should also be amended to:
  - Express the extent of identification and the rigour of assessment required as a preferred goal rather than an absolute requirement.
  - Be less prescriptive regarding the timing of the thematic history to provide for an integrated iterative process in developing the history.
  - Provide that councils will supply a useable set of base maps at the commencement of the study.
4. Heritage Victoria should consider organising a workshop for study consultants to discuss suggested changes to the study brief and other issues of common interest.
5. An exploration of ways of economising on the extent of research required on heritage places should be undertaken which should include the possibility of

documenting individual places collectively as 'classes' of places which should be protected as a significant part of a municipality's heritage.

6. Heritage Victoria should take a significant role in negotiating any prioritisation of work in Stage 2 and ensure that the consequences of these decisions are recorded in a way that can be followed up.
7. Consideration should be given to creating an implementation stage to the study programme to provide rural councils with assistance in preparing the planning scheme amendment, consultation with affected owners, and making submissions to the panel.
8. An investigation of the most appropriate means of protecting broadacre cultural landscapes in the planning scheme should be undertaken.

The above recommendations were adopted by the Heritage Council on 5 February 2004 with the following additional recommendations:

- The issues raised in the report regarding sites of archaeological potential continue to be pursued.
- The brief include reference to possible alternative means of information recording (e.g. video recording )
- The possibility of including thematic and typological studies be considered for future funding programs based on a strategic approach to the selection of topics.



### 3. Geographic Coverage

The review of the geographic coverage of heritage studies in Victoria was based on an inventory of heritage studies held by the department prepared by David Helms in 2001. This was updated to include studies not held by the department but known to Heritage Victoria and to include recent additions as well as information on on-going studies. The list should therefore provide a current picture of all studies known to Heritage Victoria.

Heritage Victoria's working knowledge was used to establish the current status of studies and an extensive file search was not required.

The result is summarised graphically in Map I and further detail is provided in the Table at Appendix 1.

The map, list and the analysis indicate that there is now extensive coverage of heritage studies across Victoria. Discounting Stage 2 studies that are underway or nearing completion, of the State's 79 municipalities, only 19 require extensive study (a full study or Stage 2 Study) and a further 6 require coverage of some smaller areas of the municipality.

The record in terms of implementation is also encouraging. While many amendments are currently in preparation or going through the amendment process and while there are a number of deficiencies in the extent of places covered in a number of areas, currently only six councils have shown a reluctance to implement their studies.

However this extent of implementation has sometimes taken a considerable time to achieve. Some specialist knowledge and considerable resources are required to implement a whole heritage amendment resulting from the completion of a study and lack of this resource seems to have been a significant cause of delay.

Table 1 lists those municipalities that are still in need of extensive studies as well as those where parts of the amalgamated LGA has not been subject to a heritage study.

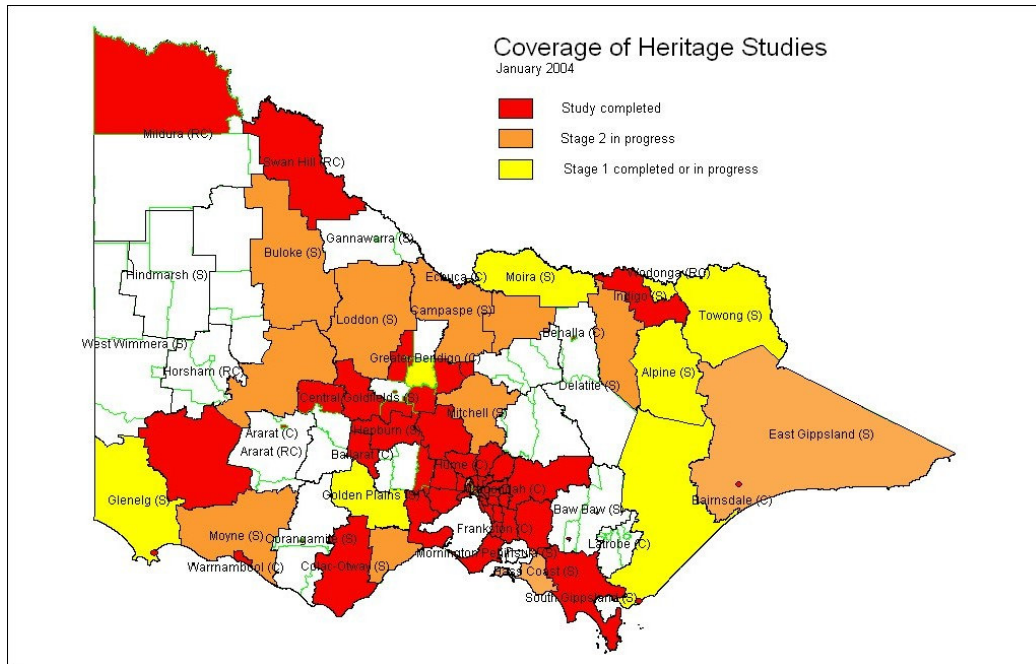
Heritage studies funded by the Department are currently conducted in two stages. Stage 1 is primarily a listing exercise and provides the basis for recommending places for documentation in Stage 2.

The first column shows the LGAs that require the equivalent of a full Stage 1 and Stage 2 study although it does include some LGAs that already have studies of small parts of the area. The second column shows LGAs where a Stage 1 study is underway or completed but where no funding has been allocated for Stage 2.





# Map





The table also provides a broad estimate of the total cost of completing geographic coverage of heritage studies.

**Table1: Areas requiring further study**

Requirement	Complete Study	Stage 2	Part of LGA
Alpine		x	
Ararat	x*		
Baw Baw	x*		
Benalla			x
Corangamite	x*		
Gannawarra	x		
Glenelg		x	
Golden Plains		x	
Greater Bendigo			x
Hindmarsh	x		
Horsham	x		
Latrobe	x*		
Mansfield	x		
Mildura			x
Moira		x	
Moorabool			x
Mount Alexander			x
Murrindindi	x		
Pyrenees			x
Strathbogrie	x		
Towong		x	
Wellington		x	
West Wimmera	x		
Wodonga		x	
Yarriambiack	x		
Total	13	7	5
Cost per Study	\$ 140,000	100,000	Varies
Total Cost	\$ 1,680,000	700,000	390,000
Grand Total	\$		2,770,000

\*Extensive studies required where studies exist for only small parts of the LGA

The estimate is based on the following assumptions:

- The typical cost of a Stage 1 study is \$40,000.
- Estimates for Stage 2 studies typically run to several hundred thousand dollars and are therefore limited in their scope by the available funding. The assumption here is that \$100,000 is the average maximum likely to be available for Stage 2 studies.
- The cost of the parts of LGAs requiring study has been estimated on an individual basis depending on the extent of the area in question and the likely degree of complexity.

The table indicates that a total of \$2,770,000 will be required to complete coverage. Rural councils usually contribute around \$20,000 for each stage of a study and this would reduce the Department's funding requirements by \$500,000 to \$2,270,000.

At the present rate of funding for heritage studies of around \$300,000 pre annum, it will take up to eight years to fund completion of the coverage of the State.



## 4. Six Studies Reviewed

### Selection of Studies

The second task in the Brief for this study was to establish whether the current heritage study brief results in satisfactory heritage studies and if not why not? The method adopted was to review of six studies by interviewing the consultant and council clients in the study area.

The studies were selected to represent a range of different types of area with different consultants in each case. They were also selected to span a period of time, but not to be so distant that the standard study brief would have been completely superseded or that the client and consultant would have difficulty in recalling the project. In two cases the council officer currently responsible for implementing or administering the results of the study was not the project officer responsible for the study. This did not prove to be a problem and indeed it appeared that these officers were able to comment on the effectiveness of the work more objectively than some who had been closely involved throughout the project.

The studies reviewed were as follows:

Study	Date Completed	Stage of Implementation	Consultant	Current Project Officer
Mornington	1994	HO in place for documented places	Graeme Butler and Associates	Peter Brown
Monash*	1998	HO in place. Revisions required by the panel re-exhibited	Andrew Ward and Associates	Jeff McAlpine
Hume (Bulla Shire)	1998	Review for amendment underway	David Maloney and Vicki Johnson	Karen Wilson
Yarra Ranges	1999	Panel hearing in progress	Context Pty. Ltd	Deb Robert
Greater Geelong Outer Areas	2001	Panel Hearing for Stage 1 completed	Authentic Heritage Services Pty. Ltd.	Kevin Krastins
Swan Hill	2001	Amendment adopted for most heritage places	Allom Lovell and Associates	Ken Fulford

\*The Monash study was not funded by Heritage Victoria and did not use the standard brief

### Structuring the Interviews

Interviews with consultants and clients were based on a series of questions derived from an examination of the standard brief dated March 2001. The brief is continually evolving and has undergone a number of additions and adjustments year by year. However most of the elements would have applied to the studies under review. The essentials of the standard brief are set out in Appendix 1.

## The Questionnaires

The questionnaire for consultants and client are similar, although the client questionnaire has more questions about the usefulness of the product and the extent to which the study has been implemented. Copies of the questionnaires can be found in Appendix 3.

A list of place types was developed for the questionnaire after examining a number of lists including the list of place types compiled by Heritage Victoria for its database. None of the lists examined met the requirements of this exercise, so the following custom list was prepared and endorsed by the client (HV) as reasonably encompassing the range of types of places that a heritage study might include.

Agricultural and horticultural sites	Mining and timber working sites
Broad acre landscapes	Monuments
Buildings:	Parks
-1914	Park features
1914-1946	Places important to defined
1946-1970	groups or cultures
1970-2003	Post contact aboriginal places
Gardens	Public Art
Industrial sites:	Ruins
-1914	Site of an historical event
1914-1946	Sites of Archaeological Potential
1946-1970	Spiritual and religious places other
1970-2003	than churches or meeting rooms
Infrastructure: bridges tunnels and dams	Street, street features, laneways
Landscape features (Fences, hedges etc)	Trees
Military sites and WW sites	OTHER (not stated above)

Definitions of the place types are not provided and in most cases they are self evident. Two place types did sometimes need to be explained during the interviews however. These were *Broad acre landscapes* and *Sites of Archaeological potential*.

Broad acre landscapes were understood to mean broad scale landscape areas such as hills, valleys, forests or coastal areas of cultural significance of the kind classified by the National Trust such as the Yarra Valley, The Patch at Monbulk, or larger areas of historical significance such as the area around the first crossing point at Seymour.

Sites of archaeological potential were those where there was little or no above ground evidence and where the possible significance of the site rested on the potential of excavation to reveal significant remains.

It should be noted that there was no expectation that all types of places would be represented in each study. Apart from those which were clearly not applicable, such as maritime and coastal places in a landlocked shire, it was considered unlikely that consultants would necessarily have considered Sites of Archaeological Potential or Public Art (other than monuments). It was however interesting to discover that some did.

There was also little expectation that Spiritual and religious places (other than churches or meeting rooms) would be included. This type of place was included in response to changes to the Burra Charter which introduced this concept.

## **The Interviews**

Most interviews were conducted by phone, although two were face to face. In one case a written response had to be relied upon.

For each study reviewed, the results of the consultant and client have been combined and summarised under the following common headings:

- |                                |   |
|--------------------------------|---|
| 1. Types of Place              | 6. Usefulness of the Product              |
| 2. The Role of the History     | 7. Implementation                         |
| 3. The Consultation Process    | 8. Other recommendations and further work |
| 4. Recording Data              | 9. Comments on the Standard Brief.        |
| 5. Resources and Documentation | 10. General Comments                      |

Where there was a divergence of view, or where it seemed appropriate to identify a comment to one the parties this has been done.

## **Basis of Findings**

The findings and conclusions have not relied entirely on the interviews. The study documents were consulted to provide some background for the interviews and were also referred to in writing up the results.

## **Summary of Responses**

### **1. Types of Place**

This review suggests that there is very good understanding by consultants undertaking heritage studies of the range of types of places they are expected to cover. Even although the standard brief does not specify the types of places to be covered, there were very few types of place on the list that had not been considered.

Nevertheless there were some not unexpected exceptions. Few studies identified places of archaeological potential independent of any visible remains. Indeed a number of consultants might reasonably take the view that, as the prime purpose of the studies is to identify places that might be protected in the planning scheme or on the Victorian Heritage Register, that identifying sites that would in any case be protected under the Heritage Act would be a very low priority. Furthermore the methodology of heritage studies places emphasis on visual inspection through field work and information gained through local knowledge. This is less likely to yield information about sites that have no remains. The thematic environmental history is also unlikely to be of sufficient detail to indicate sites of this type. However it is clear that consultants have identified sites with little or no remains such as former camp sites, where the information comes to hand. Consultants are also likely to pick up on indicators of earlier habitation such as an anomalous pattern of exotic planting that might be remnants of a former homestead garden or driveway.

The Bulla study made a special effort to identify archaeological sites. Recognising its very early settlement as important to the significance of the area the consultants spent considerable time accessing old maps to determine where former structures existed. Significantly however there have been no formal attempts to investigate these on the ground or introduce any additional form of protection.

Broadacre landscapes were another category which did not seem to be a priority in most studies. Again the Bulla study was an exception where the importance of river frontage and other landscape features were identified as keys to early settlement patterns and recommendations made for their conservation. The Mornington study

also involved the study of early maps as a key to settlement patterns but there was insufficient time to follow this through. This study did however identify extensive areas of coastline as being of cultural significance.

It is also interesting to note that the Geelong Outer Areas Study, which provides an excellent coverage of types of places, did not include the You Yangs in its listing as this was considered to be of natural rather than cultural significance.

Again this issue is probably related to the consultants awareness that the desired outcome of the study is primarily the protection of places in the Heritage Overlay and the Heritage Overlay is not an ideal mechanism for the protection and management of broadacre landscapes.

## 2. The Role of the History

The importance of the history to the outcome of the study varied considerably depending on the consultant. Some regarded this work as vital to underpinning the study and to the range of places that were identified, and felt that it was useful in documenting places in stage 2. Others considered the history as quite marginal and not particularly helpful. There was however unanimous agreement that the history should not be an independent study undertaken at the beginning of the study. The development of the history had to be an iterative process whereby an identification of the key themes informed the field work but that the history itself had to be informed by discoveries in the field and information about places from local sources. This seemed to be essential if the history was to keep its focus to explaining the features of significance that had survived.

This need for integration is illustrated by the circumstances of the Monash Study. This was the history that was least used in any of the studies reviewed and had been prepared independently some time before the rest of the study commenced.

There was also a case of some frustration being expressed about Heritage Victoria's requirement that a specialised historian be employed as part of the study team where the lead consultant believed they had the skills and knowledge to undertake the history. Whether this is reasonable or not, it is another expression of the desire for the history to be integral to the study process and not essentially a forerunner as the current brief suggests.

## 3. The Consultation Process

The success of the consultation process and its significance to the study varied considerably. The Monash study was the only one not to have held any consultation meetings, but this was due to special circumstances. Firstly the study was not funded by the Department and did not follow the standard brief. Secondly, the heritage study came about as a result of a recommendation from a neighbourhood character study which had involved extensive consultation and the Council did not believe further consultation was appropriate.

At the other end of the scale, consultation was a major feature of the Yarra Ranges study and the process is carefully reported with the number of places identified at each meeting recorded. Here the process was central to the study, to the point that consultation with selected knowledgeable informants substituted for the field work in Stage 1 and was the primary method of compiling the list of significant places. The involvement of members of the local community was also extended through the training of members of historical societies to enable them to research places for later inclusion in the planning scheme.



Most consultants found the general public consultation sessions of limited value and considered attendances to be low, even where up to twenty or thirty people might have attended each meeting. Often attendances were less with as few as five or six sometimes being the maximum attending. By way of contrast all consultants found their contacts with key members of the local historical societies and with other key informants absolutely critical to their work. These people proved invaluable in bringing significant places to the consultant's attention and also in providing documentary evidence and access to historical records.

Some council clients were concerned that the level of consultation could be greater, and this view was expressed particularly by those who were going through a planning amendment process to give effect to the study recommendations. One client suggested that "you could never have enough consultation" while another commented on the difficulty of undertaking consultation in a large suburban area where there was no particular community focus.

Innovative techniques were used in some cases. One was a competition run through the local paper for the best story about a place. Another was the use of a local FM radio station to feature stories about the study. One consultant latched on to meetings of progress associations and only held public meetings where this was not an available option.

With the exception of the Yarra Ranges study most consultants of the studies reviewed and others interviewed provided an overall impression that consultation with the general public was a task that had to be undertaken to make sure everyone had a chance to be informed and to contribute, but that this was not a useful information gathering exercise. That this process had been undertaken was important to the council client however particularly when reporting to panels on amendments to the Heritage Overlay. Although obviously the nature of the consultation at the beginning of a study is quite different to the consultation required either before or at the time of the exhibition of the amendment.

There were suggestions that the brief might be more explicit on what was expected of the consultant in terms of community consultation, and that clear guidelines would assist consultants and clients to understand what outcomes were expected.

#### 4. Recording Data

##### Ordering the List

Of the six studies reviewed, three of the consultants used their own database while the other three recorded data in various forms including tables, using Microsoft Word. The database used for Yarra Ranges and Mornington are Microsoft Access based and Filemaker Pro was used for the Geelong Outer areas Study.

However only Yarra Ranges has the consultant databases and data installed on their computers and all rely to some extent on the hard copy of the report to access information. Monash has logged the information from that study into their internal database and has no difficulty in calling up information when needed.

Most reports followed the convention of listing heritage places alphabetically by locality first followed by street and number. However there were some variations on how a locality was defined that caused some difficulties. The Bulla study used parishes to define the locality which is fine for the historian working with the parish plans, but not so easy for a planner working in contemporary Tullamarine who would be more familiar with a post code district. Even more obscurely the Monash study

uses the map sheet number as the first level of ordering the data followed by street name and number. This was done to accord with the manner in which the Council collects all its physical data.

One consultant suggested that the brief should be quite specific about how the data should be listed to avoid this sort of confusion.

Of course it can be argued that if the data has been entered into a workable database with a good range of separate fields for locality, street name, street number etc. the data can be ordered in any way required. This issue will also be addressed with the new requirement for studies to provide data in the Local Heritage Places Database (LHPD) which will provide an appropriate uniform approach.

However a number of councils rely on the hard copy to access place information and it might be worth encouraging councils to enter the information from past studies into LHPD.

### Maps and Mapping

The final product of a heritage study is new places added to the Heritage Overlay and it follows that any place recommended for protection must be located on a map. The current version of the brief requires that places be located on a planning scheme base.

This has not always proved easy and this review has been told that in some cases sites were not followed up for the overlay because of the difficulty in locating them.

Most planning scheme bases do not show street numbers and there are many bases that show only a few street names. This does not make them ideal as field maps.

In the case of both the Geelong Outer Areas and Monash studies the consultants were very pleased with the map bases provided by the council. However problems with mapping were common for four of the studies reviewed. The Bulla and Yarra Ranges studies used the 1:25.000 topographic series but this did pose problems when trying to locate places on the planning scheme. Mornington used a combination of topographic maps and Melways to find places but did not provide mapping of the places identified. Both the Bulla study and the Mornington study attempted to use historic maps as a tool to identify heritage places, but this was abandoned at Mornington as too time consuming. Good base maps eventually became available for the project at Swan Hill but occurred too late in the project to be really useful.

Some consultants have found the CFA's fire maps useful as these have a unique number for every dwelling and do name every road. Unfortunately these are no longer readily available for privacy reasons as they list the names of residents against the dwelling number.

However it seems that the situation is improving markedly. Most councils now have access to Geographical Information Systems which can provide the combination of street address and lot numbers on a cadastre base and some new planning scheme bases provide the same combination of information. The introduction of a new rural numbering system will also help to locate places outside towns and townships. Nevertheless many councils have still to develop an across the board facility in the use of GIS systems and cannot always readily supply the necessary information. There also remains the problem of accurately locating a building in a rural area on a large parcel of land. It seems unlikely that aerial photography of sufficient scale

related to the cadastre will be available for every part of the State and it may be essential to us a GPS to locate these sites.

It would be helpful and save a great deal of consultant time if the brief required the supply by councils (or DSE) of cadastre maps at an appropriate scale providing combined lot number, street name and number (or rural address number)

#### 5. Resources and Documentation

The study brief sets ambitious targets. It calls for the identification of **all** places of post contact cultural significance and also requires rigorous research and comparative analysis to justify their inclusion in the Heritage Overlay. It is perhaps not surprising that study budgets are insufficient to achieve these goals. There are three types of consequence:

1. the consultant undertakes a large amount of unpaid work,
2. the number of places to be documented is restricted in some way or
3. the level of research and comparative analysis is compromised.

This has particular consequences for the findings of this study as in three of the six studies reviewed the studies were considerably less extensive than might be expected of a comprehensive municipal heritage study. This leads to the conclusion that there are 'gaps' in many areas where a comprehensive study has been commissioned.

The issue of the gap between the specified task and the resources available for heritage studies is not new. Bill Logan, in his review of conservation studies in Victoria in 1983 found that:

'While the prospects for the conservation planning profession should therefore look healthy, most consultants are finding it increasingly unprofitable to carry out such studies and dissatisfaction has arisen with certain aspects of the conservation planning process. Some feel that their dedication to the conservation planning ideal is being exploited by employing authorities, and one consultant goes as far as saying that conservation planning consulting work is reaching a crisis point.'<sup>1</sup>

Among a number of recommendations to address this problem, Logan suggested the development of a model standard brief, and it is just such a brief that is being reviewed here.

The study brief and the staged allocation of study grants attempts to address this issue by separating the identification task in Stage 1 from the documentation task in Stage 2. The budget for Stage 2 is based on an estimate of the costs of documentation based on the number and type of places identified in Stage 1.

Apart from providing a practical basis for matching the fee to the amount of work required, this approach also has the advantages of allowing the consultant to work on the identification task free of the budgetary consequences that each additional item would entail if the whole study was being undertaken for one fixed fee.

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<sup>1</sup> Logan, W.S.: *An Evaluation of the Conservation Planning Process in Victoria*, FIT Urban Studies Unit September 1983.

The reality is however that Stage 2 budgets can rarely provide for the full documentation of all places identified in Stage 1. As a general indication, it is not unusual for a Stage 1 study to recommend 4-500 places for documentation in Stage 2. Recent estimates of the costs of researching and documenting each place provided by consultants for this review and in expressions of interest for the ten heritage studies recently commenced, range from about \$300-500. This means a budget for Stage 2 of between \$120,000 and 250,000 simply for documentation to which must be added resources for all the other costs and activities associated with carrying out and completing the study.

Clearly, something or somebody has to give. The Bulla and Geelong outer areas were achieved through a great deal of unpaid work. In both cases the output is quite prodigious for a quite modest fee and the client is very satisfied and appreciative of the quality of the work.

Stage 2 of the Swan Hill study was undertaken by a different consultant than Stage 1, so the new consultant was relying on the list and estimates prepared by another party, and here again the task was completed with a great deal of unpaid work. The Stage 2 consultants also became aware that many places of cultural significance had not been listed in Stage 1 and therefore were not documented in Stage 2.

The Mornington and Yarra Ranges studies involved a substantial process of prioritisation. This is not to imply that the consultants did not contribute extra time in order to bring the studies to a satisfactory completion, but only to say that the primary means by which the budget was made to fit the task was through negotiating limits to the number of places to be documented.

In the Mornington study, in general, only places of State and Regional significance were documented and have found their way into the Heritage Overlay. (although the client observes that some places of local significance have been documented and some places of regional significance not included).

In Monash a systematic field survey was avoided by using historic aerial photographs to eliminate new development areas and to pinpoint surviving homesteads. Some places were missed in both the surveyed and non surveyed areas and these have now been documented for a further amendment.

At Yarra Ranges a priority list of places was drawn up for documentation and a recommendation made that further research on other listed places be undertaken by the Historical Societies that had been involved in the study and had been trained for this by the consultants as part of the study process. A number of precincts were documented but some potentially significant urban precincts were not mapped for inclusion in the current amendment due to mapping difficulties.

For the places that were documented there was little evidence that the level of research and analysis had been compromised and the clients were generally satisfied with that part of the work

However some independent panels reviewing amendments to introduce new places to the Heritage Overlay have been critical of the adequacy of the documentation. This is discussed in Section 5 'Discussion of Particular Issues'.

## 6. Usefulness of the Product

While not all the studies reviewed have been through the panel process, with some minor exceptions, most clients found the product useful in dealing with enquiries,

panels and appeals and some were singled out for especial commendation. One client made the point that the documentation, particularly the history had to be accurate when under the scrutiny of Victorian Administrative Appeals Tribunal. Issues regarding difficulties with the mapping and the order in which information was recorded have been referred to above.

## 7. Implementation

Amendments to implement the Mornington and Monash have been completed. The Yarra Ranges amendment is currently before a panel. The Geelong Outer Areas Study is being implemented in stages, with the panel hearing completed for the first stage. The Swan Hill amendment is about to go to a panel for a single objecting submission. A review of the Bulla study and a further study of Broadmeadows is underway with a view to preparing an amendment.

None of the studies reviewed were subject to arbitrary 'filtering' by councillors prior to the exhibition of the amendment. Generally, councils and their officers seem happy to accept the experts view and simply leave it up to the panel to deal with submissions.

At Swan Hill however the Council agreed to accept most submissions objecting to inclusion in the overlay including one important precinct. There remains only one place subject to a submission to be considered by a panel.

The panel had concerns about sufficient 'density' of contributory buildings in some of the precincts of the Monash Study and these have been refined and re-exhibited.

So far, at Yarra Ranges, only 'priority' places have been documented and have been included in the current amendment.

The Hume Council has concerns about the integrity of some of the precincts recommended in the study and is reviewing significant places in these precincts for possible inclusion as individual overlays. At this stage there is no intention to proceed with listing the broadacre historic landscapes.

As the six studies reviewed are all at different stages in the process, no general conclusions can be drawn as to the impact on the panel process in creating 'gaps' in heritage protection. However, from Heritage Victoria's knowledge of panel recommendations on recent comprehensive heritage amendments, it can be said that even in those cases where the panel has been critical, most of the content has survived the panel process and been incorporated in the scheme and where there have been major changes as at Monash, councils have been ready to find the means to rectify the situation.

The proposed omission of broadacre cultural landscapes in the Bulla and Mornington amendment indicates a general (and probably correct) unease with applying the Heritage Overlay to such areas and some uncertainty about using other provisions of the planning scheme to protect these values.

The Swan Hill Council's decision to remove a precinct prior to the panel process, in the face of organised community opposition, is a more unusual occurrence and is not a common threat to the comprehensiveness of heritage study amendments.

It seems clear that at the conclusion of the amendment process in each case, the coverage will be reduced to some extent compared with the recommendations of the study. Some refinement is to be expected as the result of officer's consideration of the consultants report, and as a result of submissions and panel recommendations

and this is entirely appropriate. To date this does not appear to have resulted in serious systematic gaps or omissions.

There is a concern about the time taken to prepare amendments in some cases. While this concerns the effect of the study programme rather than its coverage, it has sometimes resulted in the need to update studies prior to their implementation. At Bulla the delay primarily resulted from the time taken to complete the study itself, but at Mornington the amendment had to await the appointment of a heritage planner.

There are indications across the country that many councils lack the in-house skills to handle the complexities of a heritage amendment process and may never have been aware of the time and costs involved. This suggests that if the momentum of the studies program is to be maintained, consideration might be given to funding a Stage 3 which would assist councils to draft the amendment, prepare any consequent revisions to the MSS and assist in public information and consultation and report on submissions to the council and the panel.

#### 8. Further work and other recommendations

All studies met the requirement of the brief to make recommendations regarding the promotion and management of heritage places within the municipality. Those dealing with further work are perhaps the most significant in that they reveal the true coverage of the study:

#### 9. Comments on the Standard Brief.

Some comments on the standard brief have already been referred to under other topic headings but these have been included here for ease of reference.

There was general support for the brief, which with its gradual evolution over time had provided a good basis. There was more concern at the expectations that it might be creating regarding the amount and quality of work involved which cannot be met.

This sentiment was reinforced with a suggestion that the brief might be more explicit about the amount of work expected.

Associated with this suggestion were requests for more guidance as to what was expected of the consultation process. One council client thought that a more precise prescription would ensure that adequate resources were devoted to the amount of consultation required.

One consultant thought the recommended data sheet was too complex and would like to see a simpler model drawn up after consultation with practitioners. Guidance on how listing of places should be ordered was also sought, although this issue will be partly resolved with the requirement that the data be logged on LHPD.

There was support for the integration of databases, but not necessarily the use of LHPD to achieve this. The suggestion was made that the required fields should be specified so that data could be easily assembled from the consultants own databases.

A question arose regarding assessment against the AHC criteria. Did this mean that each place should be assessed against each criterion?

The application of the thematic history to arbitrary study or local government boundaries was queried. The point was made that the new local government areas did not necessarily have any common history. This issue was exacerbated in the

Geelong Outer Areas study where the study area covered only the fringes of a provincial city.

One consultant suggested that the two stage approach was very inefficient but this was not a widespread view.

There was a call for clearer guidance on the drafting of local area policies. A model policy would be of great assistance when the structure of local policies was being questioned by panels. This led to the suggestion that it might be preferable to be able to introduce a schedule to the Heritage Overlay for each precinct, just as each area had its own schedule in other overlays.

#### 10. General Comments

There was the interesting suggestion that there could be useful dialogue between consultants to assist in resolving common problems and matters requiring clarification and that a consultant's workshop on the model of the advisor workshops would be useful.





## 5. Discussion with Key Informants

The following key informants took part in interviews:

### **Consultants**

David Helms  
Richard Peterson  
Gary Vines

### **Community**

Nigel Kirby, Save Our Suburbs  
Rohan Storey National Trust

### **Panel/VCAT**

Margaret Pitt  
Michael Read  
and further comments from  
Helen Gibson

### **Council Officers**

Lucinda Peterson  
Fiona McMahon  
David Helms

Interviews with key informants were less structured than those for the review of the six studies as not all informants were in a position to respond to all questions and the opportunity was provided to enable respondents to raise any matters they wished. The questions addressed the topic headings below, and the opportunity was taken to ask the consultant group more detailed questions on the operation of heritage studies. Topics 5-11 were only discussed with that group.

1. Do heritage studies generally result in a good basis for Heritage Overlay amendments in terms of their coverage and documentation?

The overall response from informants was that generally studies did form a good basis for amendments but all agreed that they varied considerably and not all were adequate to the task.

Lucinda Peterson suggested that current studies generally stood up well but some older studies fell short in the level of documentation. Others felt that some of the older studies stood up well in terms of the places they documented but lacked the scope of place types of current studies. Industrial sites and examples of more contemporary architecture were cited as concerns. Large complex sites presented a challenge and were therefore often not followed up. Gary Vines indicated that abandoned settlements and rural ruins and outbuildings were rarely covered, likewise sites of archaeological potential. This required a thorough search of historic maps then verification on site.

David Helms warned about attempting to document too many places for a given budget as the material could 'get a bit thin'. He also suggested that some historical backgrounds were not always relevant and that it might be better to be looking to the environmental history for support rather than a standard rate book search.

All agreed that some significant places would be missed even following the most rigorous surveys and this problem would always be with us. Fiona McMahon referred to places at the rear of sites being a regular problem such as a significant shed or factory chimney and also places missed because their original form had been concealed.

Margaret Pitt, who had reported on the amendment for the Monash study, found the basic research and identification work good, but felt a step had been missed in refining the boundaries of the precincts. Maybe there is a role for Council clients to provide a reality check between the completion of the report and the preparation of the amendment.

Discussion of the adequacy of studies to provide an appropriate basis for the overlay quickly moved on to a discussion about implementation which revealed considerable inconsistencies. Boroondara for example had failed to go further than including A grade buildings in the Kew study and had never implemented a study of Upper Hawthorn completed many years ago.

The most severe criticism of the documentation in heritage studies came from Michael Read who has detailed his views in a number of panel reports and summarised them recently in a short discussion paper "Heritage Amendments: Issues for Panels." He says his experience suggests that the justification for including individual places in the overlay are sometimes adequate, occasionally good but often poor and sometimes appalling, the later often including a history that is largely conjectural and subsequently found to be quite wrong at the panel hearing. He is also concerned over the inconsistencies in the application of AHC criteria, tenuous historical justifications and the lack of comparative analysis.

## 2. The Need for Rigorous Assessment and Comparative Analysis

A number of informants suggested that this was an appropriate goal, but agreed that it was not reasonable to expect it to be achieved.

There was agreement that comparisons with other places outside the area of the study were very rare and comparisons within the study area were often brief. At the same time local government officers agreed that a good comparative analysis, if available, was one of the most useful parts of the documentation if significance was being challenged at the panel or at VCAT.

Gary Vines and Richard Peterson both suggested that thematic studies were particularly useful for comparative analysis and felt that more of this work should be undertaken. Richard was, however careful to point out that many of these were also not comprehensive, citing his own study of government schools as an example of the scope having been curtailed by the available budget. They would like to see more of these studies published and this raises the question of how much of this work is consulted in compiling area based studies.

The lack of the required comparative analysis was also one of Michael Read's concerns.

Helen Gibson recognises that the extent of work that would be required to meet Michael Read's criticisms in full and has suggested an approach that would limit comprehensive research and analysis for most places to cases where it is really needed, that is, when the significance of a place is to be challenged at the Tribunal.

Under this approach the Heritage Overlay would be revised to show two classes of places. One class would be those places of obvious heritage significance which would be fully researched and designated as such. The other class, probably the great majority of places, would be those for which only an 'a priori' case for significance had been established. Detailed research would then only be undertaken for those places when under challenge.

This approach would not please informants who represent community organisations. Nigel Kirby on behalf of SOS is campaigning for greater certainty in planning schemes in the interests of both developers and affected residents and would want to see the overlay signifying places that would one would reasonably expect would not

be demolished. Rohan Storey (National Trust) asks “what is the point of listing a place if it can be demolished?”

Rohan further suggests that detailed comparative analysis should only be required for places of outstanding significance. For places of local significance it should be sufficient to determine its significance in the local context.

### 3. Consultation process.

Some informants pointed out that there were two very different consultation processes with different purposes at the beginning and at the end of the study. The main purpose of the initial consultation is to find out about places, or to give the public at large the opportunity to tell the consultants about significant places. It is probably not reasonable to expect the public at large to become involved at this stage and most consultants’ experience suggests that it is primarily the cognoscenti who are going to attend meetings and participate at this stage.

At the end of the study with a Heritage Overlay in the offing, the purpose is to explain the effect of what is proposed particularly to those likely to be affected. There is generally much more public interest at this stage.

Most council informants considered that for owners of places with a proposed individual listing that it was important to offer face to face individual consultation to anyone with questions or concerns. Often the consultant is involved as they are in a good position to explain the significance of the place and can often allay unsubstantiated fears about the consequences of listing.

The introduction of Heritage Overlay areas or precincts can more easily be tackled through group meetings as owners who are to be subject to controls are less likely to feel unfairly singled out (although this was not the case at Swan Hill).

With the consultation at the beginning of the study appealing to a smaller and different group to that at the end of the study the study recommendations can come as a surprise to the broader community, particularly as three years may have elapsed by the time the study is completed. There is probably therefore some merit in an informal consultation process on the study recommendations before the amendment is exhibited. The issue for councils seems to be determining the right kind of consultation at the right time.

Nigel Kirby suggested that councils needed to promote the studies as providing the basis for guiding development rather than the imposition of controls and thought that there should be compensatory measures like waving fees for applications generated by the Heritage Overlay. He also emphasised the importance of making the getting and giving of information easy. Councils needed to have the confidence to promote the benefits of the overlay. Combining this confidence with easily accessible information could help avoid the consultation process being hijacked by a small number of scaremongers.

### 4. Delays in implementing Heritage Studies

David Helms pointed out that the conditions for heritage study grants required that studies be implemented within twelve months and believed it important that this requirement be pursued.

Lucinda Peterson on the other hand, while finding the recent swift implementation of the Study at Box Hill very effective, reminded us that that the long delay following an unsuccessful attempt to introduce heritage controls in Camberwell had been beneficial as five years later the community was much more on side.

Michael Read was concerned that at Stonington, after a contentious hearing and careful selection of the councils proposals by the panel, that the council had finally only proceeded with a proportion of the places supported by the panel.

Rohan Storey considered councils failure to implement studies was the most significant problem for heritage conservation across the State.

5. Does the brief provide adequate guidance on the range of types of places to be covered?

There was some agreement that the lack of specification or limitation on the types of place to be included was positive but Gary Vines thought it should be more specific and suggested the range of places might be linked to the AHC National Historic Themes, although he admitted the difficulty that the historic themes related to activities rather than places and this would require 'translation'.

6. Is the requirement to identify all places of cultural significance in Stage 1 reasonable?

The consultant informants all considered this a reasonable objective, but Vines in particular thought it was not a reasonable expectation in reality. He thought some indication of how the list might be prioritised would be helpful. He thought we might look to list a reasonable cross section of places, the best examples or perhaps those under the greatest threat.

7. The Value of a Municipal Statement of Significance

This was a relatively new concept, but had the support of the consultants, particularly from Richard Peterson who had prepared one for the Manningham Study.

8. Cost

There was general agreement that the cost of documenting a place ranged between \$300 and \$500.

9. The Role of Local area policies

Gary Vines suggested that local area policies often tended to be motherhood statements which added little to the guidance provided by the overlay. David Helms suggested that they should fulfil the same function as a Statement of Significance and specify what should be preserved and what is acceptable in terms of new development. He added that few policies covered additions to non-contributory buildings and this was a serious gap. He was supportive of the idea of guidelines being in a second schedule to the overlay to give them greater standing.

10. What map bases are usually most suitable? Has difficulty in getting good maps been an issue?

Mapping had clearly been a problem for this group of consultants also. In a number of cases base map information had been inadequate or available late in the project. It

was pointed out that most councils now had a GIS system and could produce adequate cadastre bases. However topographic information was also required, necessitating cross referencing to fire maps. An aerial photo base with the cadastre superimposed, where available, was ideal.

#### 11. Database requirements

It appeared that all databases had advantages and disadvantages, and that the design was critical. David Helms was happy to support the use of LHPD and had transferred about 300 places manually from a recent study. Gary Vines, like Graeme Butler earlier had suggested it would be better to categorise the information and specify common fields rather specify a particular database.

#### 12. Other issues relating to the heritage study and heritage amendment process

David Helms called for model local policies to provide a clear direction on when demolition was acceptable.

Nigel Kirby also called for consistency in the consideration of policies on demolition. He was particularly concerned with the Port Phillip idea that the quality of the replacement building could be taken into account in deciding on demolition.

Lucinda Peterson believed that the Heritage Overlay failed to deliver on community expectations and that this may be because the idea of what constituted a heritage area had become 'watered down' and therefore not supported by the Tribunal. Helen Gibson also raised the issue of the legal structure of heritage protection not meeting community expectations but it will be necessary to await her report on a major heritage amendment for Ballarat for her suggestions.



## 6. Discussion of Particular Issues

The issues raised in Sections 3, 4 and 5 have been addressed in the conclusions and recommendations. However three topics seem to deserve a little more discussion:

- priorities for addressing gaps in heritage study coverage
- the adequacy of documentation and
- the two types of place that seem to be less well addressed in current studies.

### **Priorities for Addressing Gaps in Heritage Study Coverage.**

Section 3 has shown that there is an impressive geographic coverage of the State, a coverage that will be more impressive with the completion of a number of Stage 2 studies later this year. If the annual rate of funding and the typical cost of heritage studies remain the same, it will take about eight years to fund the completion of that coverage.

Overall the extent to which these studies have been, or are in the course of being implemented is also promising, despite some considerable delays that have been experienced in the past.

The review of selected studies in Section 4 however suggests that this coverage is far from 'complete' in the sense that in most studies there are places or classes of places that have not been documented. Not all types of places that have been documented have found their way into the planning scheme. There has also been criticism from panels concerning the quality of documentation in some studies.

This raises the question of what Heritage Victoria's priorities should be in funding the effective identification of heritage places in Victoria. Should the current policy of giving priority to new studies in new areas be maintained or should some funding be set aside for councils that are aware of serious gaps in the documentation and implementation of their studies?

Maintaining the current policy has the advantage of providing a clear objective with a predictable outcome. Complete geographic coverage can be achieved within a decade or so.

More importantly it will have the effect of involving all councils in the management of the State's heritage assets within the foreseeable future. Heritage will not be seen as something only for historic townships and the inner metropolitan suburbs but becomes (as to a considerable extent it has already) a regular part of municipal administration.

In this sense, the current policy can be seen as a seeding program, raising awareness in the councils and communities. If not everything is documented at the end of the major study phase, councils can develop strategies for addressing particular problems over time.

The need to maintain the momentum of the current studies program is also a consideration. There are currently eight Stage 1 studies completed or underway and it is good practice to ensure the Stage 2 studies are supported as soon as possible after Stage 1 is completed. On current practice this will cost at least \$560,000 absorbing most of two years allocation, and limit the scope for Stage 1 studies to be commenced.

The merit of setting aside funding to address deficiencies in existing studies depends on how serious these deficiencies are and whether grant funding from the Department is the appropriate way to address them.

The review of the six studies suggests that there are probably significant gaps in many studies. However if the prioritisation process has been undertaken sensibly it is to be hoped that the most important places will have been documented and that those places that have not been documented are not those under the greatest threat. Isolated homesteads in rural areas would be a typical example.

The six studies review also suggests that many councils have put in place measures to address these gaps. Monash has documented a number of places that were not picked up in the main study and are proceeding with an amendment. At Yarra Ranges the consultants set up a system involving knowledgeable groups in the community who have been trained to undertake documentation of places of lower priority with final review by the consultant. Swan Hill is aware of a number of places in the township that should be looked at once the current amendment process has been completed. Mornington Peninsula are pleased that their later studies at Hastings and Flinders have been progressively more comprehensive although they would like to have support to review the Mornington Study.

Looking beyond the six studies, most inner metropolitan councils have carried out extensive reviews, which has meant that many of the very early studies have been extensively supplemented and there is significant work going on in other metro councils. The City of Knox, after being made aware that they were unlikely to attract grant funding under current priorities, have budgeted for a comprehensive heritage study to supplement a much more limited study of some years ago. Likewise the City of Warrnambool, after applying unsuccessfully a number of times for a further review study have decided to go it alone and have received support from two benevolent trusts. Pyrenees Shire have just completed an amendment on their own initiative, covering heritage precincts in the shire.

Given the universality of gaps or omissions in heritage studies across the State, prioritising funding support to address them is also problematic. Perhaps it would be more useful to understand that the completion of a 'comprehensive' heritage study is the beginning and not the end of the heritage management process and that all councils can expect that continuing review will be required, perhaps through an ongoing program of smaller scale exercises over time.

For the time being at least, it would seem to be more effective to direct the available funding for 2003-04 and 2004-05 to completing what has been started and to start only a limited number of Stage 1 studies until the funding position for 2005-06 is known.

### **The 'Quality' Issue**

As outlined in Section 4 there was little evidence that the level of research and analysis was compromised in the studies reviewed and the clients were generally satisfied with that part of the work

However some independent panels reviewing amendments to introduce new places to the Heritage Overlay have been critical of the adequacy of the documentation. In some cases the panel has gone beyond simply dealing with those places subject to objecting submissions but, as a result of considering these cases, has questioned the quality of the work throughout the study.



Michael Read, the author of a number of these panel reports, has summarised his concerns in a discussion paper for panel members. His key concerns relate to the adequacy of historical research, inconsistent application of the AHC criteria, lack of comparative analysis and consequently how thresholds are established. In addressing the question of 'rigorous assessment' he says:

'Stonington Council put to the C5, C6 Panel that the term 'rigour' should be interpreted in terms of Council's reasonably available resources and should be limited to "a level of analysis which is capable of practical implementation". That Panel rejected this proposition, referring instead to need for Council to balance four matters: its obligations under the *Planning and Environment Act 1987* (Section 4(1)(d)), its obligation to determine which places properly met these requirements, its available resources and the imposition placed on owners of properties affected by the HO. The panel suggested instead that, if Councils resources were inadequate to achieve rigour within a specified period, the process would have to take longer'

This raises the question: how much is enough? There is already a conflict between the expectation that the study will be comprehensive and cover a broad range of place types and the resources available to document them. If the bar on the quality of research is to be raised higher then this will require further curtailment of the number of places or areas that can be covered.

Helen Gibson has suggested that the Heritage Overlay be revised to include a category of place for which only an 'a priori' case for significance would be required. The requirement for a permit to alter or demolish would still apply, but the significance of these places could be challenged at the Tribunal. This would allow detailed research to be concentrated on these places where there was a dispute. This system could provide considerable savings, but raises many questions about how it would operate in practice. It would be unlikely to appeal to councils and their communities who are increasingly looking for more certainty in planning schemes.

In answer to the question posed if the funding did not prove adequate for the job: "looking back, how would you recommend dealing with Stage 2 if you could have varied the brief but the fee remained the same?" most respondents suggested curtailing the geographic extent of the study. This has the clear advantage that the limits to the study are obvious as is the need for further work. No respondent suggested restricting documentation to only the most significant places, although this has occurred in the past. The experience has been that only those more significant places end up in the Heritage Overlay and there is much less incentive to follow up with less important places.

Limiting the geographic area is one way to address the quality issue. More practically substantially increasing budgets for Stage 2 studies would have the same effect. This requires either a greater annual appropriation or an acceptance that the study program will extend for many more years.

Study budgets under the two stage process have been more generous in recent years but it must be remembered that, on average, the area of each municipality has tripled with amalgamation and it is also likely that the range of types of places that consultants are expected to cover has increased.

But how much research is necessary and how much expenditure of public money on that research is justified? Are there other ways in which the work can be documented in Stage 2 without compromising the comprehensiveness of the study?

One strategy is to not research individually any place within a precinct. If the objective is to provide a basis for protection in the overlay then this seems a sensible economy which has already been adopted by some consultants.

But could this same principal be applied to groups of places of a similar type? If, for example Victorian farmhouses are relatively rare in a study area and there is a case for listing them all, perhaps one history and statement of significance, related back to the thematic history, could suffice for them all?

Coupled with this approach there could be some general statements in the study about the types of places that should be conserved and the criteria used to select them. This is the link between the history of the area and what should be conserved throughout that area to represent that history. A municipal statement of significance might have a role here also. The inclusion of a Municipal Statement of Significance in the MSS could underpin a statement about the expectations of what kinds of places should be protected in the planning scheme.

Another suggestion from informants was that more thematic studies would assist with comparative analysis. This raises the question as to the extent existing thematic studies are consulted as part of the municipal heritage study process. The data is not available on line and a systematic search of the reports would be very time consuming. This would suggest that attention should be given to making the information from existing studies more easily accessible before embarking on further thematic projects.

Part of the problem may be that it is the requirements of the brief that are unrealistic. Most respondents agreed that the identification of all places of cultural significance in Stage 1 was a necessary objective but not one that would ever be fulfilled completely. Likewise the need for 'rigorous and analytical assessment including comparative analysis' for each significant place was unreasonable if the consultant was required to make comparisons outside the study area.

It is also possible that this issue is of less relevance to the current program of studies than has been the case in the past. The criticisms have arisen from hotly contested sites in the metropolitan area where the implications of the overlay are, or were perceived to be, substantial. This is less the case in rural areas where there is not the same level of development pressure. The studies program in the metropolitan area has been completed and all funded studies are now in rural and regional areas.

It is therefore suggested that this issue be addressed by adjusting the study brief to make it more realistic, by accepting that there will be a degree of prioritisation in the documentation of places in Stage 2 and by exploring the means by which the significance of 'classes' of place might be established collectively.

Prioritisation is best undertaken on a case by case basis as it needs to reflect the circumstances in the study area, but the brief could usefully suggest the general principals on which it might be undertaken.

Apart from these measures some increase in study costs should also be anticipated if a reasonable level of documentation is to be achieved in future studies.

### **Range of Types of Place**

Section 4 of this report indicates that all consultants have a good understanding of the range of types of places that they are expected to identify. However a brief

discussion of two types of place that do not seem to be being dealt with satisfactorily is merited. These are broadacre landscapes and sites of archaeological potential. It is no accident that these types of places have been the subject of special interest to the Council's Landscape and Archaeology committees.

#### Broadacre Landscapes

This was made a separate category in the types of place list due to a concern that places may not be seen as 'mainstream' places of cultural significance. Urban parks, gardens, and significant plantings seem to be well covered but broad scale 'scenic' mountain, valley or coastal landscapes of the type identified by the National Trust from the 1970s do not seem to have the same attention.

One difficulty may be that their significance may be seen as natural rather than cultural, and it is certainly true that the National Trust has classified many landscapes primarily for their natural values.

However the deficiency in this area seems to relate more to the issue of implementation rather than identification or documentation. The Heritage Overlay is not an ideal mechanism for protecting extensive landscape areas and the focus of the studies program is on the Heritage Overlay. Where broadacre landscapes have been documented, they seem to have a lower priority, partly due to uncertainty about the best way to deal with them in the planning scheme. This suggests that they may also have a lower priority when selecting places for documentation.

Some guidance to councils and consultants could help to address this and the brief might usefully indicate the types of overlay that would be most appropriate.

#### Sites of Archaeological Potential

This category was created to describe sites with little or no above ground features, but which were considered to have the potential to yield information through excavation. It was included because of the Archaeology Committee's concern that there is no formal program for identifying these types of site and no process for involving local government in their protection. The committee is currently exploring whether and how these places might be included in planning schemes and whether their importance should be better highlighted in the Heritage Study Brief.

This Review does not attempt an answer to this question. The review of the six studies does confirm that where archaeological sites were identified this was usually in association with above ground remains.

This is not surprising as the methodology of heritage studies places emphasis on visual inspection through field work and information gained from local knowledge. Those consultants that did attempt to identify such places worked with historical maps which then had to be matched with current topographic maps to identify sites of former settlement etc. This exercise proved to be very time consuming and in one case was abandoned for that reason.

This suggests that if increased emphasis is to be given to this type of place in future studies it is likely to add a whole new layer to the study process and that this will need to be funded accordingly.



## APPENDICES



Review of Heritage Studies Program  
**Current Status of Heritage Studies**

**APPENDIX 1**

<b>Municipality</b>	<b>Existing Studies</b>	<b>Implemented?</b>	<b>Coverage Required</b>
Alpine Shire	Wandiligong Valley only (MPE1987) new Stage 1 Study underway	Yes	Balance of Shire
Ararat Shire	Town Only (Hubbard 1994)	No	Rural areas
Ballarat City	Ballarat 1980((JLV) Trees and Gardens 1983 (RBG) Buninyong 1983 (Coleman+Sutherland) Ballarat Stage 1 1988? (Ward) Review 2002, precincts only (Hansen Partnership)	Partially  Panel report imminent	Individual listings outside city area
Banyule City	Landscape studies Heidelberg 1985 (Butler), Banyule 1999.(ALA)	Yes	Should be covered. May be places missed outside Heidelberg area
Bass Coast Shire	Stage 2 commencing (ALA)	na	Some places will not be included.
Baw Baw Shire	Walhalla 1984 (PC Sand Butler) Warragul 1989?(Bick)	Yes Yes	Rural areas on private land
Bayside City	Sandringham, 1989 (Ward) Sandringham landscape 1989 (PC with Laceworks) Review 1999 (ALA)	Partially	Should be comprehensive
Benalla Rural City	Benalla City 1993 (Budge+Ward)	Yes	All rural areas
Boroondara City	Harcourt street, Hawthorn Grove, St James park, Elgin Street 1974? (L&B). Canterbury Shopping Center 1981 (JLV). Upper Hawthorn 1983 (Butler). Auburn Village 1986 (DPE-Knight) Camberwell 1986 (Sanderson??+Butler) Kew 1988 (Sanderson). Camberwell 1991 (Butler) Camberwell Junction 1991 (Elphinstone). Hawthorn 1993 (Gould).	Yes but only grade A buildings in Kew and grade A and B in Camberwell.  Some important commercial areas not in overlay.	Kew coverage is probably more selective than others having identified only grade A&B buildings.
Brimbank City	Brimbank 2000 (Vines <i>et al</i> )	No	Comprehensive coverage
Bullocke Shire	Stage 2 underway		Should be comprehensive
Campaspe Shire	Waranga Shire 1988 (Butler) Echuca City 1992 (Ward). Identification in balance of the shire by history societies. Stage 2 Study now funded.	Yes	The balance of the Shire should be covered by study about to get underway.
Cardinia Shire	Cardinia Conservation Study 1996 (Butler)	Yes	Good Coverage

Casey Shire	Berwick 1993 (Context) Berwick-Packenham Corridor 1988 (Hicks) Casey 1988 (Butler)	Yes	Should be reasonably comprehensive but 'gap' study may be quite selective.
Central Goldfields	Bet Bet Shire 1987 (McConville) Talbot and Clunes Shire 1988 (Aitken) Maryborough 1992 (Bick <i>et al</i> ) 'Gaps' study 2002? (Ward)	Earlier studies implemented	Should be well covered
Colac –Otway Shire	Colac Otway 2003 (Sheehan <i>et al</i> )	No	Comprehensive coverage, but stone walls not covered.
Corangamite	Camperdown 1998 (Willingham)	Only A grade buildings	Balance of shire
Darebin City	Coburg 1991 (Hubbard) Northcote 1982 (Butler) Individual buildings 1996 (ALA) Preston area 1996 (ALA)	Yes	Appears to be a comprehensive coverage but Council has concerns about gaps
East Gippsland Shire	Bairnsdale 1989 (Peterson) East Gippsland Region Sites1979?(Reg. Planning Committee) Community heritage assessment project 2000? (Context)	Bairnsdale only	Funding now provided to cover all outstanding areas
Frankston City	Frankston City 1993 (Butler <i>et al</i> ) Frankston City East 1997 (Butler <i>et al</i> )	Partially	Good coverage
Gannawarra Shire	No studies	na	Whole of Shire
Glen Eira	Glen Eira 1996 (Ward)	Yes	Good coverage
Glenelg	Portland 1981 (WilsonSayer+Trethowan <i>et al</i> ) Genelg Shire Stage 1 2002 (Jean)	Yes	Balance of shire awaiting Stage 2 study which is not funded.
Golden Plains Shire	Bannockburn covered by Geelong Regional Study 1986 (Willingham) New Stage 1 underway (Huddle <i>et al</i> .)	Yes na	Whole shire to be covered
Greater Bendigo City	Eaglehawk and Bendigo 1993 (Butler) Strathfieldsaye area study underway (Bick) Metcalfe (Jacobs and Twigg) Marong (Ward)	Partially, not Marong	Former Huntly Shire will remain a gap when Strathfieldsaye study is completed.
Greater Dandenong City	Greater Dandenong Stage 1 1998 (Butler) Greater Dandenong Stage 2 2002 (Butler)	On exhibition	Good Coverage
Greater Geelong	Geelong Region 'List' 1985 Geelong Region 1986 (Willingham) Geelong West 1986 (Huddle and Honman) Newtown 1991 (Context) Geelong City 'C' citations 1995 (Lardner)	Yes. Outer areas still in process	Good coverage



	Newtown 'C' citations 1996 (Lardner) Bellarine 1996 (Huddle <i>et al</i> ) Geelong Outer Areas 1998 -2000 (Huddle/Rowe)		
Greater Shepparton	Waranga Shire 1988 (Butler) Greater Shepparton Heritage Study Stage 1 (Johnson) Greater Shepparton Heritage Study Stage 2 2003 (ALA)	No na	May require further identification due to deficiencies in Stage 1
Hepburn Shire	Daylesford and Hepburn springs 1985 (Ward) Talbot and Clunes 1988 (Aitken) Creswick Goldfields 1989 (McConville) Creswick Shire 1991 (Tropman <i>et al</i> ) Daylesford and Glenlyon 1995 (Jacobs)	Yes	Good Coverage
Hindmarsh Shire	No studies	na	Whole of Shire
Hobsons Bay City	Williamstown 1986 (Butler <i>et al</i> ) Altona Laverton and Newtown 2000 (Butler)	Yes - Williamstown	Good Coverage
Horsham Rural City	No studies		Whole of Shire
Hume City	Bulla Shire 1998 (Moloney +Johnson) Broadmeadows City 1999 (Vines+Ford) Whittlesea 1991 (Gould)	No No State and regional level only	Good Coverage
Indigo Shire	Yackendandah 1975 (L&B) Beechworth reconstruction 1976(Tibbets <i>et al</i> ) Chiltern 1981 (Sutherland <i>et al</i> ) Yackendandah Shire Buildings 1982 (Sutherland) Beechworth Trees 1986 (O'Connor+Hawker) Indigo Shire stage 2 2000 (Freeman <i>et al</i> )	Yes  In progress	Good Coverage
Kingston City	Oakley 1991 (Hassel) Kingston Stage1 2000 (Sheehan) Stage 2 underway (Raworth)	Awaiting completion of Stage 2	Good coverage
Knox	Knox 1993 (McInnes)	Yes	Some Coverage more required
Latrobe Shire	Traralgon 1992 (Johnston)	No	Balance of the shire
Loddon Shire	Bet Bet Shire 1987 (McConville) Korong Shire 1991 (Budge+Ward)	Yes	Balance of Shire being completed by Ward
Macedon Ranges Shire	Kyneton Shire 1990 (Bick) Macedon Ranges inc. landscape Date? (Budge+Butler <i>et al</i> )	Partially	Additional places listed in report for later documentation. No implementation of landscape protection.
Manningham City	Doncaster and Templestowe 1991 (Context) Doncaster and Templestowe 1993-4 (Peterson ) Warrandyte 1993 (Petersen)	Yes	Good Coverage

Mansfield Shire	No studies	na	Whole of Shire
Maribyrnong City	Footscay 1989 (Butler) Maribyrnong Heritage Review 2002 (Butler)	Yes On Exhibition	Good coverage
Maroondah City	Maroondah 2003 (Peterson)	No	Coverage should be complete
Melbourne City	Extensive studies not detailed here	Yes	Good coverage
Melton Shire	Stage 2 underway (Moloney)	na	Should be good coverage
Mildura Rural City	Former Mildura city and former Shire area 1988 (Ward)	Yes	Former shire of Walpeup
Mitchell Shire	Kilmore town 1982 (PC+Butler) Mitchell Shire stage 1 2002 (Huddle+Wight) Mitchell Shire Stage 2 underway (Huddle et al.)	Yes  No	Stage 2 Study underway. Some places will not be included.
Moira Shire	Tungamah Central Area 1983 (Ward+Butler) Moira Shire Stage 1 (Huddle et al.)now underway	No	
Monash City	Oakleigh 1991 (Hassel) Monash 1998 (Gerner+Ward)	Yes	Part of City not covered
Moonee Valley City	Essendon 1985 (Butler) Former Keilor area Stages 1&2 underway (Butler)	Yes - Essendon	Will have good coverage
Moorabool Shire	Bacchus Marsh 1995 (Peterson)	No	Balance of Shire
Moreland City	Brunswick 1982 (Lewis) Brunswick Review 1990 (Context) Coburg 1991 (Hubbard)	Yes	Good Coverage
Mornington Peninsula	Flinders 1992 Context+Lardner. Mornington Shire 1994 (Butler) Hastings District 2001 (Butler)	Yes No local places Yes	Reasonable coverage
Mount Alexander Shire	Maldon 1977 (JLV) Chewton 1977 (L&B) Castlemaine 1979 (PLM – Ward?) Maldon Trees and Gardens ( RBG) Metcalf 1994 (Vines +Twigg) Maldon Historic Reserve 1989 (DCFL)	Yes	Good coverage?
Moyne Shire	Port Fairy 1985 (MoP) Moyne Stage 2 funded.	Yes – Port Fairy	Coverage will be good.
Murrindindi	No studies		Whole of Shire
Nillumbik Shire	Eltham 1992 (Bick <i>et al</i> ) Nillumbik Shire gap Study (Butler)	Partially	Reasonable coverage
Northern Grampians Shire	Main Street St Arnaud 1978 (Staughton) Shire of Stawell 1990 (Hist Soc.)		

	Shire of Stawell selected sites 1994 (Hutchinson Thorson) Northern Grampians Stage 1 1999 (Taylor)		
Port Phillip City	South Melbourne 1978 (YF+AF). Port Melbourne 1979 (JLV). St. Kilda area 1 1982 Emerald Hill 1983 (ALA). South Melbourne 1987 (ALA). St. Kilda 20 <sup>th</sup> Century Architectural Study 1992 (Trethowan) Port Phillip Heritage Review 2000 (Ward)	Yes	Good Coverage
Pyrenees Shire	Beaufort Commercial Precinct 1986 (Mullens Kellaway) Avoca Shire 1994 (Jacobs+Twigg) "Precincts" Study 2002 (Rowe+Huddle)	Yes	Major gap outside former Avoca Shire
Queenscliffe Borough	Queenscliffe Urban Conservation Study 1982 (ALA et al.)		Good Coverage
South Gippsland Shire	Stage 2 Study 2000 (Westmore+Helms)	No	Good Coverage
Southern Grampians Shire	Hamilton city 1991 (Hubbard) Southern Grampians Stage 2 (Hubbard). Nearly complete	Yes na	Should provide good coverage
Stonnington City	Glenferrie Road/High Street 1983 (Coleman+Sutherland). Prahran 1983 (Lewis). Prahran Character and Conservation 1992 (Lewis <i>et al</i> ). Malvern 1992 (Lewis+Aitken). Conservation Review 1993 (Context). Additional work by Raworth +Butler	Some individual buildings in Malvern not covered	Reasonable Coverage
Strathbogie Shire	Euroa 1985 (Bick)	No	Whole of the Shire
Surf Coast Shire	Stage 2 underway (Context)	On exhibition	Will provide good coverage
Swan Hill Rural City	Swan Hill RC Stage 1 1988 (Ward <i>et al</i> ) Swan Hill RC Stage 2 1999 (ALA)	Yes	Good coverage
Towong Shire	Stage 1 underway	na	
Wangaratta Rural City	Stage 2 2003 (Doring) nearing completion	In process	Good coverage
Warrnambool City	Warrnambool urban area, 1983 (Ward <i>et al</i> ) Allansford, Bushfield, Woodford and Farnham selected sites 2001 (Doyle+Honman+Aitken)	Yes	Council plans to deal with sporadic gaps
Wellington Shire	Port Albert 1992 (Butler). Sale 1994 (Context)	Yes Only partially with	Stage 2 should provide good coverage.

	Wellington Stage 1 being completed (Context)	major omissions na	
West Wimmera Shire	No studies	na	Whole Shire
Whitehorse City	Box Hill 1990 (Ward) Whitehorse review 1999 (ALA)	Yes	Good coverage
Whittlesea City	Plenty Valley Historical survey 1988 (MPE-Hicks). Former Whittlesea Shire 1991 (Gould)	Only state and regional places in Whittlesea	Requires some 150 places of local sig. to be documented
Wodonga Rural City	Baranduda area of former Yackendandah Shire Historic Buildings study 1982 (Sutherland) Wodonga Stage 1 underway (Freeman)	No na	Stage 2 will provide good coverage
Wyndham City	Werribee Growth Area 1990 (Ward) Wynham 1997 (Context)	Being implemented in stages	Good coverage
Yarra City	Fitzroy 1878 (JLV) South Fitzroy 1979 (JLV) Collingwood 1988 (Ward) Fitzroy review 1992 (ALA) Collingwood 1995 (Ward) Yarra Review 1999 (ALA) Precincts Review 2002 (Wight <i>et al</i> )	Yes +in process	Good coverage but further study proposed.
Yarra Ranges Shire	Yarra Ranges Stage 1 1999 (Context) Yarra Ranges Stage 2 1999 (Context)	Partially	Good coverage
Yarriambiack Shire	No studies	na	Whole of Shire

## Appendix 2

### Key Requirements of the Heritage Victoria's Municipal Study Brief Study Brief

- Assessment and documentation of **all** post contact places of cultural significance.
- Community consultation
- Subjective public and non-expert opinion to be taken into account as well as the professional view.
- To be undertaken in two stages with Stage One (initial listing) estimating the extent of the task required to adequately document the places identified in Stage 2
- Project Management plan for each stage
- Thematic environmental history
- AHC criteria to be used but thresholds to be State or Local
- AHC Principal Historic Themes to be used
- HV Guidelines for Thematic Environmental Histories to be referred to.
- Thematic history to precede identification of places.
- Community consultation method to be approved by Steering Committee
- Statement of Significance for the municipality to be provided in Stage 1.
- Identification to be based on:
  1. thematic history
  2. registers, studies and reports
  3. community consultation
  4. field work
- Mapping of identified places
- Listing with location details of all places identified
- Photograph of each place
- May require electronic database to be developed in consultation with HV
- In Heritage Areas all significant places to be mapped.
- Policies required for insertion in planning scheme for Heritage Areas
- Rigorous and analytical assessment including comparative analysis required for each significant place.
- Documentation of places according to a standard proforma.
- Review of Thematic Environmental History in Stage 2
- Places to be recommended for either
  1. The Victorian Heritage Register
  2. The Heritage Inventory
  3. Protection within the planning scheme.
- Other recommendations for conservation particularly for:
  1. Places at risk
  2. Places with high potential for interpretation
  3. Opportunities for increasing public understanding of cultural heritage.



## Consultant and Client Council Questionnaires

### Questionnaire – Consultants Version

#### 1. Scope

A. What was your understanding of the scope of places of cultural significance?  
Did it include?

Types of Place	Yes	No	Comment
Agricultural and horticultural sites			
Broad acre landscapes			
Buildings:			
-1914			
1914-1946			
1946-1970			
1970-2003			
Gardens			
Industrial sites:			
-1914			
1914-1946			
1946-1970			
1970-2003			
Infrastructure: bridges tunnels and dams			
Landscape features (Fences, hedges etc)			
Maritime or Coastal places			
Military sites and WW sites			
Mining and timber working sites			
Monuments			
Parks			
Park features			
Places important to defined groups or cultures			
Post contact aboriginal places			
Public Art			
Ruins			
Site of an historical event			
Sites of Archaeological Potential			
Spiritual and religious places other than churches or meeting rooms			
Street, street features, laneways			
Trees			
OTHER (not stated above)			

B. Of the types of place covered do you believe each type was given adequate coverage or was some priority given to particular types?

C. Do you believe the study achieved the objective of identifying **all** places of post contact cultural significance?

D. If not what was most likely missed?

## **2. Sources**

A. Did the TEH throw up places that might not have been picked up otherwise?

B. What sort of community consultation was used? How many people did this involve?

C. Did you list and research some places solely because they were valued by the community at large i.e. social significance alone?

## **3. Recording Data**

A. What sort of database was employed?

B. In what order were the places of significance listed?

C. Were the map bases supplied accurate and useable?

## **4. Documentation**

A. Was the estimate of resources required for stage 2 accurate and did the required resources materialise?

B. If so what was the average cost of documenting each place?

C. If not how was stage 2 accomplished, - prioritisation or a lot of unpaid work?

D. Was it possible to provide 'a rigorous assessment and comparative analysis' in each case?

E. Was the TEH useful in documenting the significance of places?

F. Was the Municipal Statement of Significance useful?

## **5. Recommendations**

A. Were any places recommended for the Heritage Inventory?



- B. If so what criteria were applied to select these places?
- C. What recommendations other than for listing were made?

**6. Implementation**

- A. Has the study been translated into a planning scheme amendment?
- B. Were Heritage Area policies inserted in the planning scheme amendment?
- C. Were all places you recommended included in the amendment?
- D. If not what was the selection process?

**7. General**

- A. Overall did the funding prove adequate for the job?
- B. If not, looking back, how would you recommend dealing with Stage 2 if you could have varied the brief but the fee remained the same?
- C. Leaving costs aside do you believe the standard brief is appropriate? Are there changes you would like to see made to the standard brief?
- D. What further work do you believe is still required in the study area?
- E. Other comments.

## Questionnaire - Council Client Version

### 1. Scope

A. What was your understanding of the scope of places of cultural significance?  
Did the study include?

<b>Types of Place</b>	<b>Yes</b>	<b>No</b>	<b>Comment</b>
Agricultural and horticultural sites			
Broad acre landscapes			
Buildings:			
-1914			
1914-1946			
1946-1970			
1970-2003			
Gardens			
Industrial sites:			
-1914			
1914-1946			
1946-1970			
1970-2003			
Infrastructure: bridges tunnels and dams			
Landscape features (Fences, hedges etc)			
Maritime or Coastal places			
Military sites and WW sites			
Mining and timber working sites			
Monuments			
Parks			
Park features			
Places important to defined groups or cultures			
Post contact aboriginal places			
Public Art			
Ruins			
Site of an historical event			
Sites of Archaeological Potential			
Spiritual and religious places other than churches or meeting rooms			
Street, street features, laneways			
Trees			
OTHER (not stated above)			

- B. Of the types of place covered do you believe each type was given adequate coverage or was some priority given to particular types?
- C. Do you believe the study achieved the objective of identifying **all** places of post contact cultural significance?
- D. If not what was most likely missed?
- E. What sort of community consultation was used? How many people did this involve?

## **2. Recording Data**

- A. Is the database used useful and easy to access or update?
- B. In what order were the places of significance listed?
- C. Were the map bases supplied accurate and useable?

## **3. Documentation**

- A. Was the estimate of resources required for stage 2 accurate and did the required resources materialise?
- B. If not how was stage 2 accomplished, - prioritisation or a lot of unpaid work?
- C. Do you believe the documentation of individual places was adequate an appropriate to your needs?
- D. Do you believe the documentation for heritage precincts was adequate an appropriate to your needs?
- E. Was it possible to provide ‘a rigorous assessment and comparative analysis’ in each case?
- F. Is the Municipal Statement of Significance useful?

## **4. Recommendations**

- A. Were any places recommended for the Heritage Inventory?
- B. If so what criteria were applied to select these places?
- C. What recommendations other than for listing were made?

## **5. Implementation**

- A. Has the study been translated into a planning scheme amendment?
- B. Were Heritage Area policies inserted into the planning scheme amendment?

C. Were all places the consultant recommended included in the amendment?

D. If not what was the selection process?

Did the study prove to be a reliable resource for dealing with enquiries and submissions relating to the amendment?

E. Did the study prove to be a valuable resource at the panel hearing?

F. Does the study provide a useful basis for assessing planning applications?

G. Has the study data proved to be useful in preparing submissions and defending appeals?

## **6. General**

A. Overall did the funding prove adequate for the job?

B. If not, looking back, how would you recommend dealing with Stage 2 if you could have varied the brief but the fee remained the same?

C. Leaving costs aside do you believe the standard brief is appropriate? Are there changes you would like to see made to the standard brief?

D. What further work do you believe is still required in the study area?

E. Do you have any further comments on the heritage study process?