

**Heritage Impact Assessment of the SANBI KZN Herbarium,
Durban Botanic Gardens, 4 Problem Mkhize Road**



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July 2014**



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All buildings over the age of 60 years are automatically protected by legislation. In terms of the National Heritage Act no 25 of 1999, provision for the automatic protection of buildings over the age of 60 years is made in clause 34.1 which stipulates that '*No person may alter or demolish any structure or part of a structure which is older than 60 years without a permit issued by the relevant provincial heritage resources authority.*' Application for demolition or alteration of these structures would have to be directed to the Provincial Heritage Resources Agency for KwaZulu - Natal, *Amafa aKwaZulu – Natali* in Pietermaritzburg and scrutinized in terms of the KwaZulu – Natal Provincial Heritage Resources Act no 4 of 2008.

Please note also that whilst this heritage report has certain recommendations, they may or may not be upheld by the adjudicators in the appropriate Heritage Authority, when it comes to assessment. This is part of the process, and once that first level of adjudication has been completed, then the appropriate steps for a second phase can be assessed. Much can be achieved / mitigated in the design process, given correct briefing by the client and sufficient dexterity by the architects involved.

1. Introduction

Debbie Whelan and Lulama Mhlongo of Archaic Consulting were requested by Michael Van Niekerk of Futureworks Sustainability Consulting (Pty) Ltd. to carry out a built environment and heritage assessment of the proposed renovations / extensions to the SANBI KZN Herbarium situated at the Durban Botanic Gardens. The intention is to demolish the old Glasshouse, and a couple of ancillary buildings, in order to provide space for the construction of a new building on the site

The Herbarium and Medley Wood House are declared National Heritage sites.



Fig 1: Schematic layout of the site illustrating Medley Wood House (1) the Herbarium (2), Resource Centre (3), Garage (4), Existing Laboratory (5), Umdoni Block (6), and the existing Glasshouse (7) all situated at the Durban Botanic Gardens.



Fig 2: The Herbarium from the south



Fig 3: Eastern facade



Fig 4: The Herbarium, in the late 19th century (McCracken 1996:68)

2. Methodology and statement of expertise

Debbie Whelan of Archaic Consulting is an experienced researcher working in the historic built environment field. She has nearly two decades of experience, including both national and international experience.

Archaic Consulting was provided with the following documentation by Futureworks Sustainability Consulting (Pty) Ltd.

- Site plan
- A detailed plan as to the exact nature of the maintenance works intended to be carried out on the KZN Herbarium site.

Furthermore, Archaic Consulting was briefed by Mr. Michael Van Niekerk to,

- *Liaise with AMAFA to confirm which permits, if any, are required.*
- *To complete and submit the relevant permit applications if required.*
- *To provide specialist input in the identification of potential impacts that might arise as a result of the proposed renovations / extensions.*
- *To provide recommendations for mitigating these potential impacts for inclusion in our Environmental Management Plan*

Debbie Whelan and Lulama Mhlongo visited the site and inspected buildings in order to ascertain the condition of each building. Following the site visit, some documentation in local libraries and the Killie Campbell Collections was sourced in order to flesh out the history of the site and its buildings, in order to present a more holistic perspective of the complex.

3. History of the Site

The 'Herbarium', consisting of a number of related buildings, is located on the western edge of the Durban Botanic Gardens which were established in 1849 (McCracken 1996: v).¹



Fig 5: The Durban Botanical Gardens site in the early 1900's (McCracken 1996:68)

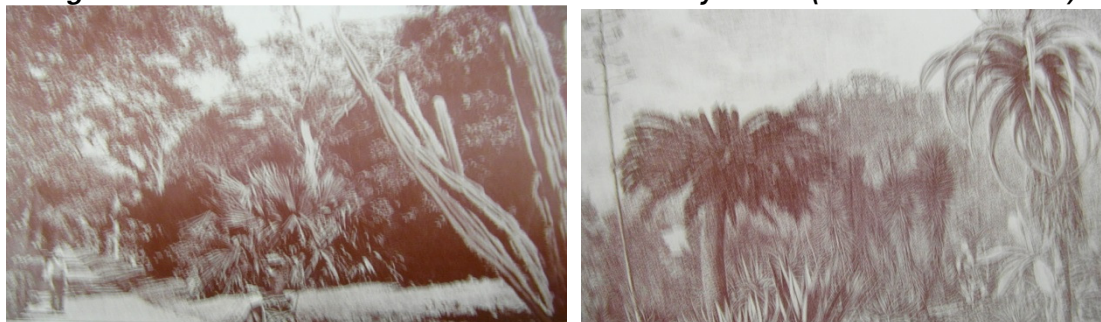


Fig 6 & 7: The Durban Botanical Gardens site in the early 1900's (McCracken 1996:68)



Fig 8: A high society social gathering of the late 19th century at the Durban Botanical Gardens (McCracken 1996:68)

As seen in Table 1 (McCracken 1996: 2-3) of the Annexures in this document, the Durban Botanical Garden was established a year after the Cape Town Botanical Gardens and proved the most successful of the ten South African gardens. It is interesting to note that the Durban Gardens became the oldest surviving gardens on the African continent with a multitude of

¹ We find that as with Museums that endeavour to collate and categorise human adventure, rituals, behaviour, artefacts and traditions, Botanical gardens also endeavour to do the same collation with plants. Therefore the 'Gardens' most basic function is to accumulate botanical & horticultural knowledge, in the form of research, and the dissemination of that knowledge, in the form of educating & informing the public. It is here where the Botanic Gardens secondary function of the delighting the eye and senses comes in (McCracken 1996: 1).

plant species in its repository for public consumption and education. The gardens would come to be known as a forest of wonderment in which visitors would come annually from afar to view the gardens at the 'Hook's Estate'.

In the late 19th century, the Durban Botanic Gardens were popular with a great number of visitors and contemporary postcards display their latest attractions.

The Durban Botanical Gardens focused on plant propagation and circulation, and the provision of plant material for sale to farmers. Over the years, many ventures were tried in a bid to make revenue for the Gardens; some were a success and some were not. Amongst these was the arrowroot (*Maranta arundinacea*) which proved quite successful after being imported in 1850 by Mark McKen, along with:

"Mango, Allspice, Assam and Paraguay tea, Gamboge, black pepper, quassia, ginger, cocoa, plum, wampee, jackfruit, cinnamon, coffee, longaan, camphor, pawpaw, blood and mandarin orange, ipeccuanha, guava and China guava, rose apple, and cinchona" (McCracken 1996: 73).

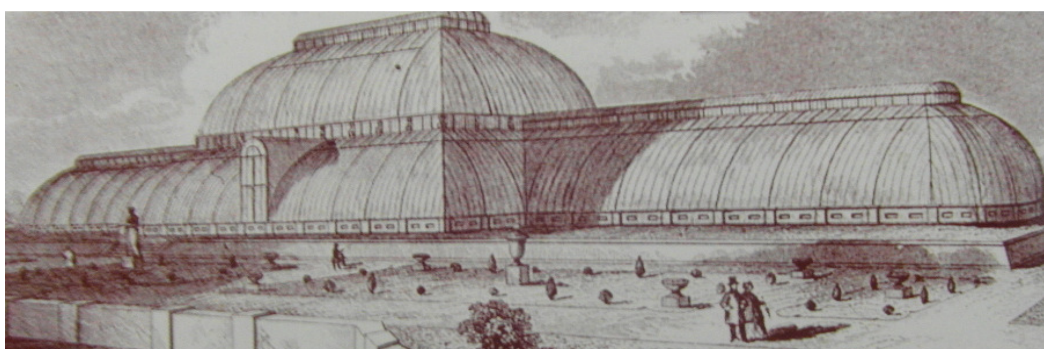


Fig 9: The Royal Botanical Gardens at Kew directives about botany were disseminated to the colonies in the Victorian era (McCracken 1996:68).

These various plants that served as beverages, medicines, fruits, spices, or flavour enhancers were planted in Sam Beningfield's garden before transportation to the new Berea (now known as Botanic) site in 1851. Almost all the above listed plants were a failure but spurred a reimagining by Kew Gardens of plant propagation from their Colonial repository to their sub-colonies in exchange for the colonie's indigenous plants. This ensured the growth of the Royal Botanic Gardens (McCracken, 1996: 73) and the concomitant "Victorian botanical imperialism" embodied in the *Great Palm House* that had been erected with new innovation of curvilinear glass in 1844-48 (McCracken *at al*, 1990: xv).

4. Medley Wood House

Medley Wood House is named after John Medley Wood who was both curator and director of the Herbarium from the late 1800's to the early 1900's. He worked fervently, devoting some 33 years of his life to the success of the Botanical Gardens and is said to be the 'father of Natal botany'. He had come to work at the gardens in 1882, having farmed at Inanda after arriving in South Africa from England.

Others people are also connected: Dr Charles Johnston was at the gardens at the outset, in 1849 and Mr. Mark James McKen – affectionately known as 'the fiery Scot' served the gardens for two periods; firstly from 1851-1853 and then again between 1860-1872. Of the curators, Medley Wood stayed in the Curator's house for the longest period (McCracken, 1996: 56-73).

As noted, this building is a declared Heritage Landmark, and as such is protected in terms of the KwaZulu – Natal Provincial Heritage Resources Act no 4 of 2008.

It is a substantial domestic - scale building of red Flemish Bond, flush - pointed face - brick under a corrugated sheeting, hipped and gambrelled roof. There is a veranda to the eastern

aspect, as well as partly to the north and partly to the south. Entrance is from the south, highlighted by an asymmetrical projecting gabled wall with a dominant edging of dentil courses in the pediment. The veranda floors are covered with bi-coloured encaustic tiles. Veranda posts are segmented, shaped, fluted timber and are topped with elaborate timber brackets. The sub-floor ventilators are comprised of both cast iron and ceramic varieties.

The planning follows a central passageway, with rooms leading off this. To the rear of the building, (the west) is a collection of additional spaces, forming utilitarian areas and the back, kitchen veranda. The condition of the building is generally excellent.



Fig 10: House along veranda



Fig 11: House from entrance



Fig 12: Garden below house



Fig 13: Rear aspect to the west



Fig 14: Side door to north



Fig 15: Northern elevation

Statement of significance:

Medley Wood House	Local	Regional	National	International
Architectural	high	high	high	low
Historical	high	high	high	low
Social	high	high	high	low
Technical	low	low	low	low
Scientific	low	low	low	low

Recommendation: This building is protected in terms of the KwaZulu – Natal Provincial Heritage Resources Act no 4 of 2008, and as such any renovations/extensions or maintenance changes be made with sensitivity to the historical significance of the house and be carried out to complement it, and subject to approval by Amafa.

5. The Herbarium

First known as the Natal Herbarium or 'Colonial Herbarium' it was built in 1902 (McCracken, 1996:68). Various noteworthy events were held here, such as the presentation to John Medley Wood with an honorary doctorate from the University of Good Hope. It is here where a lot of plant and botanical research was carried out and recorded any new findings (McCracken 1996: 69). The Herbarium is also a declared Heritage Landmark in terms of the erstwhile National Monuments Act, and as such now falls within the protection of the KwaZulu – Natal Provincial Heritage Resources Act no 4 of 2008.

It is constructed of red face - brick in English Bond, many bricks of which have been badly repaired with which compromises the integrity of the building. The pointing is raised.

As with the Medley Wood House, this is also a substantial domestic scale building of red facebrick with raised pointing, under a Marseilles Tiled roof. Unlike the Medley Wood House which is of definite domestic form, this building is long, orientated along a north – south axis which allows for long, open verandas to both the east and the west. The clipped eaves of the building are characterized by a strong dentil course

The building sits on the contour such that these verandas have a very different character: the western veranda flows directly into the garden space outside, forming a practical, engaged space, whilst that on the eastern side is impractical: it is narrow, ceremonial and is raised some nearly 3m above the ground level to the east. This aspect of the building is very disassociated from the western side of the building.



Fig 16: The Herbarium in the early 20th century (McCracken 1996)



Fig 17: View of the same, eastern elevation



Fig 18: Elevation to the west



Fig 19: Southern elevation showing patched brick



Fig 20: Badly patched brickwork



Fig 21: View of entrance veranda



Fig 22: View of northern elevation



Figs 23 & 24: Views of northern elevation



Fig 25: Veranda on eastern side



Fig 26: Water damage to timber posts



Fig 27: Cast iron ventilator



Fig 28: Detail of ventilation guard



Fig 29: Buttresses



Fig 30: Eastern elevation showing water damage.

Statement of Significance:

This building is protected in terms of the KwaZulu – Natal Provincial Heritage Resources Act no 4 of 2008, and as such any renovations/extensions or maintenance changes be made with sensitivity to the historical significance of the house and be carried out to complement it, and subject to approval by Amafa.

Herbarium	Local	Regional	National	International
Architectural	high	high	high	low
Historical	high	high	high	low
Social	high	high	high	low
Technical	low	low	low	low
Scientific	low	low	low	low

6. Resource Centre

Situated on the lower terrace, this building is a substantial domestic - scale structure constructed of red face - brick under a hipped Marseilles Tiled roof. Its main entrance is from the central access area to the west, and the northern aspect is characterised by a glazed conservatory.

Architecturally, it is reasonably nondescript, and utilitarian. However, its value does increase due to its forming part of the group of buildings supported by the Medley Wood House and the Herbarium.

Though it is unclear exactly when the Laboratory was built, English Bond suggests that it was constructed around 1920-30's. It is glazed with 6x6 timber sash windows, and has doors of the same era with timber fanlights.



Fig 31: Resource Centre from the west



Fig 32: Resource Centre from the north



Fig 33: Conservatory



Fig 34: Resource centre from south west



Fig 35 & 36: Resource Centre from west showing main entrance way

Statement of significance:

That any renovations/extensions or maintenance changes be made with sensitivity to the historical significance of the Resource Centre and be carried out to complement the existing monument.

Resource Centre	Local	Regional	National	International
Architectural	high	low	low	low
Historical	medium	medium	low	low
Social	high	medium	low	low
Technical	medium	low	low	low
Scientific	high	low	low	low

7. Garage

This building is a double carport situated on the extreme north of the site. It is a modest, utilitarian building constructed of facebrick under fibre cement sheeting with no architectural value, and no value from any other perspective. The building is in excellent condition.



Fig 37: The Garage

Statement of Significance:

This building has no significance on any level.

Garage	Local	Regional	National	International
Architectural	low	low	low	low
Historical	low	low	low	low
Social	low	low	low	low
Technical	low	low	low	low
Scientific	low	low	low	low

8. Existing Laboratory

This is a small, prefabricated building of asbestos sheeting, of indeterminate age, situated on top of the higher terrace. It has little architectural value, and, certainly, given its material construction, its retention is problematic from the perspective of Health and Safety.

This Laboratory consists of a number of different materials in its construction. A one metre high stretcher - bond brickwork base exists to part of it, whilst the balance consists of panels of asbestos sheeting. The scale of the doors and windows is reduced and shows top-hung windows and a standard 900x2100mm timber door. It has little to no heritage value.



Fig 38: The laboratory from the east



Fig 39: The laboratory from the north

Statement of significance:

This building has no significance to support its retention and it is recommended that demolition, should it be sought, can be condoned.

Existing Laboratory	Local	Regional	National	International
Architectural	low	low	low	low
Historical	low	low	low	low
Social	low	low	low	low
Technical	low	low	low	low
Scientific	low	low	low	low

9. Umdoni Block

This is a long, narrow building on the top terrace. Its core section, to the northern end, is the older part, which has latterly been extended along the terrace with a structure of similar form and proportion. It is hidden right along the boundary and is not very visible from the main part of the site.

It has little architectural value, although the original section is potentially historic. However, given the scale and proportions of the space, this is dubitable, and the suspicion is that antiquated methods of brick construction were employed in a latter day building.



Fig 40: Building from the north



Fig 41: Umdoni Block from the south

Statement of significance:

This building has no significance to support its retention and it is recommended that demolition, should it be sought, can be condoned.

Umdoni Block	Local	Regional	National	International
Architectural	low	low	low	low
Historical	low	low	low	low
Social	low	low	low	low
Technical	low	low	low	low
Scientific	low	low	low	low

10. Glasshouse

This structure is situated on the top terrace and as such is largely obscured from the main part of the site. It is a late Victorian structure, with a substantial lower section of plastered and painted masonry, then topped with a lighter weight structure of timber glazed sections, operated in places by cast iron prefabricated elements to open and close the glasshouse.

It is in bad condition, and demolition has been approved by Amafa, on condition that the Cast – iron sections be delivered to the Amafa Materials Bank after demolition for safe keeping.

The Durban Botanical Gardens Glasshouse has always from time to time needed refurbishing or rebuilding due to its fragile nature. The earliest known glasshouse was the Jubilee Conservatory glasshouse, built in 1898. This was erected from a kit imported from James Boyd of Glasgow at £3 000 (McCracken 1996: 58). The Governor of Natal at the time, Walter Hely-Hutchinson opened the Conservatory on the 8th December 1898 where creams teas were served to the audience and the Durban Light Infantry Band played (McCracken 1996: 58). The conservatory would hold social gatherings there from time to time and proved a hit. The glasshouse was badly damaged in a hail storm in 1928.



Figs 42 & 43: The condemned glasshouse



Figs 44 & 45: Industrial elements of the glasshouse

Statement of significance:

Whilst the building has merit in its unique nature, age and materials, it has been condemned subject to the working parts being sent to the Amafa Materials bank on demolition.

Glasshouse	Local	Regional	National	International
Architectural	medium	low	low	low
Historical	medium	low	low	low
Social	low	low	low	low
Technical	low	low	low	low
Scientific	low	low	low	low

11. The Shed

This is a commonplace 'Wendy House' constructed of timber. It has no heritage value.



Fig 46 : The Shed

Statement of Significance:

This building has no merit on any level to justify its retention.

The Shed	Local	Regional	National	International
Architectural	low	low	low	low
Historical	low	low	low	low
Social	low	low	low	low
Technical	low	low	low	low
Scientific	low	low	low	low

12. Protocols for the removal of the old Glasshouse

Whilst the approval for the removal of the old Glass House has been officially given, it is important that this event occur within a defined framework.

Given that the site is tight, and that the proximity to the main buildings is close, as well as the configuration of the access road, which allows for limited mobility and movement, the manner in which this building is deconstructed has to be carefully managed.

Furthermore, the impact of demolition in terms of noise will also negatively affect the operations of the complex.

- ***It is recommended that the demolition of this structure take place on weekends, in order that the staff access is not inconvenienced.***
- ***Given the tightness of the site, it is also recommended that the process of demolition be planned in order that the rubble be conveyed directly to the trucks removing the waste, in order that as little damage, and mess, be allowed to remain on site.***

It is suspected that the removal of the top structure will incur less noise pollution than the demolition of the lower half.

13. Protocols for the design of the new building

The intention is that a new top structure will take the place of the Glasshouse and the old prefabricated structure on the site. Given that this will be a single structure, it is a good opportunity to rationalise the built space on the top terrace, and make the available facilities more obvious. This will entail the removal of most of the buildings on the top level, in order to make way for any new structure of any meaningful size and use. The assessments in the previous sections, in addition to the acknowledgement that the Glass House will be removed, allows for this development.

Any new development also has to be contextualized in terms of its position on the site (elevated on the top terrace and therefore ABOVE the old, valued structures) as well as its proximity to the boundary along Problem Mkhize Road.

The current planned footprint is a long, narrow building. Little other detail currently exists.

13.1 Design and material considerations

It is strongly suggested that the new building to be constructed on the site be lightweight, and as 'negative' / transparent as possible, in order not to conflict with the monolithic nature of the main structures on site, namely Medley Wood House, the Herbarium and the Resource Centre. All of these are of red face - brick and with a consistent design ethos, proportion and scale which ensures that they 'hang' together as a unit.

It is recommended that the materials employed in the new building take the opportunity to explore contemporary material options, but at the same time be constructed in a modest and elegant fashion. It is thus important that the new designs for the building replacing the Glasshouse are carried out modestly, and that they conform to the rigour suggested in the Burra Charter (see section below).

At the same time, clues from the extant built environment can be gleaned and redeployed in the new building, such as elements of proportion and scale, formats of doors and fenestration, textures, and surfaces, in order to make the new building as 'at home' as possible.

14. General management of buildings on site

Whilst in general, the maintenance of buildings on site has been carried out expeditiously over the years, it is vital to stress the importance of continued maintenance on such buildings.

The document provided to Archaic Consulting notes briefly what the intentions are regarding repairs to the buildings on site. These generally tend to be 'replace gutters and downpipes' and 'specialist flooring contractor to repair floors'. There is also a note regarding sorting out the water problems on the eastern façade of the Herbarium.

It must be stressed that a cursory site inspection picked up a number of issues that would need to be addressed more systematically and with urgency – issues that do not necessarily fall within the ambit of this report.

It is recommended that the architects that are appointed by SANBI in order to remove the Glasshouse, and design and construct the new building, also be contracted to sort out a number of general maintenance issues, in liaison with professionals at Amafa.

- The replacement of gutters and downpipes has to be detailed and itemized: correct and appropriate materials have to be chosen, and these decisions submitted to Amafa for approval.
- The nature, extent and manner of timber floor repairs will also have to be detailed, itemised and assessed in liaison with professionals at Amafa.
- The process by which the water issues on the eastern façade of the Herbarium are to be addressed, ie stripping plaster, drying, excavating, installing correct slotted

drainage etc would also have to be thoroughly investigated and in liaison with professionals at Amafa.

- Importantly, the very serious issue of the rotting timber posts to the eastern veranda wall will also have to be assertively addressed: the option of assessment of extent, replacement, splicing, contractors available are all issues that will have to be carefully detailed and be thoroughly investigated in liaison with professionals at Amafa.

15. Final Conclusions

- ***That the buildings affected by the construction of the new building on the upper level terrace be removed as they all have limited architectural, historic or any other heritage value.***
- ***That, as per permit, the Glasshouse be demolished and the cast iron operating elements be lodged in the Amafa Built Environment Materials bank.***
- ***That in order to minimise noise and traffic disruption, the Glasshouse and any other demolitions on the upper part of the site, be carried out on weekends and be systematically managed in order to limit the impact of rubble on site.***
- ***That no rubble be allowed to remain on site when contractors are not present.***
- ***That the new building follow the design principles in the Burra Charter, and at the same time take clues from the extant built environment in order to maximise visual cohesion of the buildings on the site.***
- ***Given that two structures on site are heritage landmarks and thus protected in terms of the KwaZulu – Natal Provincial Heritage Resources Act no 4 of 2008, a full audit of the general maintenance issues should be carried out by a design professional and that any materials or process decisions be submitted to Amafa for approval.***

16. References

McCracken, D. 1996. *The New History of the Durban Botanic Gardens*. Durban: Durban Parks Department City of Durban, Group Editors (Natal) (Pty) Ltd.

McCracken, D & McCracken, P. 1990. *Natal The Garden Colony: Victorian Natal & the Royal Botanic Gardens Kew*. Sandton: Frandsen Publishers.

Royal Botanic Gardens, Kew, 1915. *Bulletin of Miscellaneous Information (Royal Botanic Gardens, Kew)*. Published by Springer on behalf of the Royal Botanic Gardens. [Journal].

17. Annexure 1

Table 1

Table 1 (according to McCracken in <i>A new history of the Durban Botanic Gardens</i>)		
South African botanic gardens established between 1848 and 1888.		
A. Cape Colony	B. Colony of Natal	C. Republic of Transvaal
Cape Town 1848	Durban 1849/1851	(British 1877-81)
Grahamstown 1850	Pietermaritzburg 1874	Pretoria 1874
King William's Town 1865		
Port Elizabeth 1870		
Graaff Reinet 1872		
Queenstown 1877		
East London 1888		

Table 2

Table 2 (according to McCracken in <i>A new history of the Durban Botanic Gardens</i>)			
Specimens in the Colonial Herbarium: 1885-1915			
Year	Total number of specimens	South African specimens	% South African
1885	3 280	2 380	73 %
1890	8 272	4 883	59%
1895	17 070	7 295	43%
1900	26 040	8 693	33%
1904-5	34 061	10 131	30%
1909-10	42 914	12 474	29%
1915	46 000	13 500	29%

18. Conservation Guidelines suggested in the Burra Charter (1988)

These guidelines, which cover the development of conservation policy and strategy for implementation of that policy, were adopted by the Australian national committee of the International Council on Monuments and Sites (Australia ICOMOS) on 25 May 1985 and revised on 23 April 1988. They should be read in conjunction with the Burra Charter.

1.0 Preface

1.1 Intention of guidelines

These guidelines are intended to clarify the nature of professional work done within the terms of the Burra Charter. They recommend a methodical procedure for development of the conservation policy for a place, for the statement of conservation policy and for the strategy for the implementation of that policy

1.2 Cultural significance

The establishment of cultural significance and the preparation of a statement of cultural significance are essential prerequisites to the development of a conservation policy (refer to Guidelines to the Burra Charter: Cultural Significance).

1.3 Need to develop conservation policy

The development of a conservation policy, embodied in a report as defined in Section 5.0, is an essential prerequisite to making decisions about the future of a place.

1.4 Skills required

In accordance with the Burra Charter, the study of a place should make use of all relevant disciplines. The professional skills required for such study are not common. It cannot be assumed that any one practitioner will have the full range of skills required to develop a conservation policy and prepare the appropriate report. In the course of the task it may be necessary to consult with other practitioners and organisations.

2.0 The Scope of the Conservation Policy

2.1 Introduction

The purpose of the conservation policy is to state how the conservation of the place may best be achieved both in the long and short term. It will be specific to that place. The conservation policy will include the issues listed below.

2.2 Fabric and setting

The conservation policy should identify the most appropriate way of caring for the fabric and setting of the place arising out of the statement of significance and other constraints. A specific combination of conservation actions should be identified. This may or may not involve changes to the fabric.

2.3 Use

The conservation policy should identify a use or combination of uses, or constraints on use, that are compatible with the retention of the cultural significance of the place and that are feasible.

2.4 Interpretation

The conservation policy should identify appropriate ways of making the significance of the place understood consistent with the retention of that significance. This may be a combination of the treatment of the fabric, the use of the place and the use of introduced interpretive material. In some instances the cultural significance and other constraints may preclude the introduction of such uses and material.

2.5 Management

The conservation policy should identify a management structure through which the conservation policy is capable of being implemented. It should also identify:

- (a) those to be responsible for subsequent conservation and management decisions and for the day-to-day management of the place;
- (b) the mechanism by which these decisions are to be made and recorded;
- (c) the means of providing security and regular maintenance for the place.

2.6 Control of physical intervention in the fabric

The conservation policy should include provisions for the control of physical intervention. It may:

- (a) specify unavoidable intervention;
- (b) identify the likely impact of any intervention on the cultural significance;
- (c) specify the degree and nature of intervention acceptable for non-conservation purposes;
- (d) specify explicit research proposals;
- (e) specify how research proposals will be assessed;
- (f) provide for the conservation of significant fabric and contents removed from the place;
- (g) provide for the analysis of material;
- (h) provide for the dissemination of the resultant information;
- (i) specify the treatment of the site when the intervention is complete.

2.7 Constraints on investigation

The conservation policy should identify social, religious, legal or other cultural constraints which might limit the accessibility or investigation of the place.

2.8 Future developments

The conservation policy should set guidelines for future developments resulting from changing needs.

2.9 Adoption and review

The conservation policy should contain provision for adoption and review.

3.0 Development of Conservation Policy

3.1 Introduction.

In developing a conservation policy for the place it is necessary to assess all the information relevant to the future care of the place and its fabric. Central to this task is the statement of cultural significance. The task includes a report as set out in Section 5.0. The contents of the report should be arranged to suit the place and the limitations of the task, but it will generally be in three sections:

- (a) the development of a conservation policy (see 3.2 and 3.3);
- (b) the statement of conservation policy (see 3.4 and 3.5);
- (c) the development of an appropriate strategy for implementation of the conservation policy (see 4.0).

3.2 Collection of Information

In order to develop the conservation policy sufficient information relevant to the following should be collected:

3.2.1 Significant fabric

Establish or confirm the nature, extent, and degree of intactness of the significant fabric including contents (see Guidelines to the Burra Charter: Cultural Significance).

3.2.2 Client, owner and user requirements and resources

Investigate needs, aspirations, current proposals, available finances, etc., in respect of the place.

3.2.3 Other requirements and concerns

Investigate other requirements and concerns likely to affect the future of the place and its setting including:

- (a) federal, state and local government acts, ordinances and planning controls;
- (b) community needs and expectations;
- (c) locational and social context.

3.2.4 Condition of fabric

Survey the fabric sufficiently to establish how its physical state will affect options for the treatment of the fabric.

3.2.5 Uses

Collect information about uses, sufficient to determine whether or not such uses are compatible with the significance of the place and feasible.

3.2.6 Comparative information

Collect comparative information about the conservation of similar places (if appropriate).

3.2.7 Unavailable information

Identify information which has been sought and is unavailable and which may be critical to the determination of the conservation policy or to its implementation.

3.3 Assessment of information

The information gathered above should now be assessed in relation to the constraints arising from the statement of cultural significance for the purpose of developing a conservation policy. In the course of the assessment it may be necessary to collect further information.

3.4 Statement of conservation policy

The practitioner should prepare a statement of conservation policy that addresses each of the issues listed in 2.0, viz.:

- fabric and setting;
- use;
- interpretation;
- management;
- control of intervention in the fabric;
- constraints on investigation;
- future developments;
- adoption and review. The statement of conservation policy should be cross-referenced to sufficient documentary and graphic material to explain the issues considered.

3.5 Consequences of conservation policy

The practitioner should set out the way in which the implementation of the conservation policy will or will not:

- (a) change the place including its setting;
- (b) affect its significance;
- (c) affect the locality and its amenity;
- (d) affect the client owner and user;
- (e) affect others involved.

4.0 Implementation of Conservation Policy

Following the preparation of the conservation policy a strategy for its implementation should be prepared in consultation with the client. The strategy may include information about:

- (a) the financial resources to be used;
- (b) the technical and other staff to be used;
- (c) the sequence of events;
- (d) the timing of events;
- (e) the management structure.

The strategy should allow the implementation of the conservation policy under changing circumstances.

5.0 The Report

5.1 Introduction

The report is the vehicle through which the conservation policy is expressed, and upon which conservation action is based. See also Guidelines to the Burra Charter: Procedures for Undertaking Studies and Reports.

5.2 Written material

Written material will include:

- (a) the statement of cultural significance;
- (b) the development of conservation policy;
- (c) the statement of conservation policy;
- (d) the strategy for implementation of conservation policy. It should also include:
 - (a) name of the client;
 - (b) names of all the practitioners engaged in the task, the work they undertook, and any separate reports they prepared;
 - (c) authorship of the report;
 - (d) date;
 - (e) brief or outline of brief;
 - (f) constraints on the task, for example, time, money, expertise;
 - (g) sources (see 5.4).

5.3 Graphic material

Graphic material may include maps, plans, drawings, diagrams, sketches, photographs and tables, clearly reproduced. Material which does not serve a specific purpose should not be included.

5.4 Sources

All sources used in the report must be cited with sufficient precision to enable others to locate them.

All sources of information, both documentary and oral, consulted during the task should be listed, whether or not they proved fruitful. In respect of source material privately held, the name and address of the owner should be given, but only with the owner's consent.

5.5 Exhibition and adoption

The report should be exhibited and the statement of conservation policy adopted in accordance with

Guidelines to the Burra Charter: Procedures for Undertaking Studies and Reports