



DRAFT GUIDELINES FOR STATE GOVERNMENT HERITAGE

Preparation, review and periodic
updating of State Government
Heritage Inventories

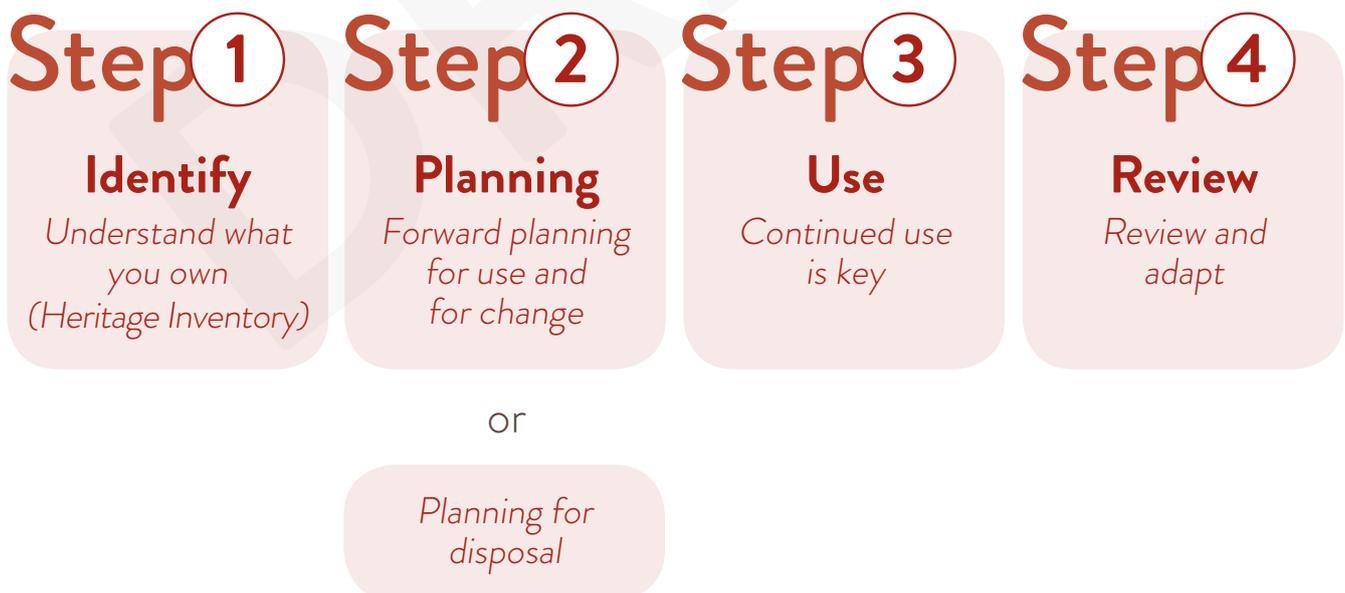
HERITAGE INVENTORIES – Identify and understand what you own

The Government of Western Australia is the largest owner of heritage places in the State, owning and managing over 500 of the 1300 places in the State Register of Heritage Places and on other heritage lists, such as the World Heritage List, the National Trust List of Classified Places, and Local Government Local Heritage Surveys.

Heritage assets within an agency's property portfolio may be only a small proportion of its total assets, however as a custodian of these important heritage places, agencies have a responsibility to ensure that they are identified, managed and conserved in the present and for the future.

The first step in effective heritage asset management is identifying the heritage assets that a agency has within its portfolio, and to do this, the Heritage Council recommends that each State agency has its own Heritage Inventory.

Once an agency has identified the heritage assets that it is responsible for, it can establish strategies and priorities to plan for its use, change or disposal, and to continue using its heritage assets appropriately with conservation in mind. A four-step approach to managing heritage assets is set out in the **Guidelines for State Agencies – Management and Conservation of State Government Heritage Assets**.



BENEFITS

A Heritage Inventory is a useful tool for identifying heritage assets that an agency owns and collating this information into one centralised document.

At its most basic level, a Heritage Inventory will identify heritage assets that an agency owns. This enables an agency to identify statutory processes that apply when using, developing or disposing of a heritage asset, and to anticipate potential reputational damage if a heritage asset is not well maintained or is in poor condition or vacant.

Without a Heritage Inventory, an owning agency may not be aware of all the heritage assets within its portfolio.

From an operational perspective, with continual organisational change within Government and individual agencies, the centralisation of heritage asset information will enable the effective management of those assets over the long term.

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INVENTORY CONTENTS, SECTIONS and STAGED PREPARATION

A four-stage process for the preparation of Heritage Inventories is recommended, and forms part of step one Identify in the overall management and conservation process outlined in the **Guidelines for State Agencies – Management and Conservation of State Government Heritage Assets**.

The Heritage Inventory process is divided into manageable stages, each one serving a specific function and builds on the information prepared in the section before. This gradual process allows an agency the flexibility to prepare the inventory in its entirety, or over time, according to the resources and level of detail required by the owning agency.

Stage 1

List of Heritage Assets

Compile a list of heritage assets, and identify places where statutory processes apply.

Stage 2

Condition Reports

Detailed condition reports for State registered heritage assets, with note of required repairs.

Compile a list of at risk (very poor condition or vacant) heritage assets.

Stage 3

Thematic History

Thematic history of agency, with analysis of heritage assets that represent agency themes, for agency wide disposal clearance.

Stage 4

Strategic Planning

Analysis of an agency's heritage portfolio, with recommendations about strategic planning issues – priorities for works programs, budgeting, use issues, disposal candidates, at risk issues that require immediate action.

HERITAGE INVENTORY

Guidelines

Stage 1

List of Heritage Assets

Compile a list of heritage assets, and identify places where statutory processes apply.

The first stage in preparing a Heritage Inventory is the compilation of a list of heritage assets, and identifying where statutory processes apply. This list could take the form of spreadsheet, and should be uncomplicated and easy to understand.

The purpose of this section of the inventory is to:

- Identify all heritage assets that an agency owns or is responsible for
- Identify statutory heritage listings where statutory processes apply.

HERITAGE ASSET LIST - CONTENT

The heritage asset list section of the Heritage Inventory should include:

1. Introduction - explaining the purpose and precedent of the Heritage Inventory
2. Spreadsheet of heritage assets - including the following minimum information for each asset:
 - Name of Heritage Asset
 - Location/ street address
 - HCWA identifier
 - Statutory Heritage Listing
 - Other Heritage Listing.

Example – List of Heritage Assets spreadsheet

Agency name: Department of Health

Name of Heritage Asset	Location	HCWA identifier	Statutory Heritage Listing	Other Heritage Listing
Armadale Kelmscott Memorial Hospital	Albany Highway, Armadale	P10616	None	
Bentley Hospital	Mills St, Bentley	P25940	City of Canning Heritage List (2018)	
Broome Hospital	Bounded by Anne, Robinson, Barker and Walcott St, Broome	P12038	None	
King Edward Memorial Hospital for Women	Barker Rd & Railway Pde, Subiaco	P2438	State Register (1992). City of Subiaco Heritage List (2004)	
Narrogin Regional Hospital	Williams Rd, Narrogin	P15426	State Register (2000)	
Lock Hospital Ruins	Bernier & Dorres Islands	P25544		HCWA Assessment Program (2016)
Leonora Hospital (old section)	Sadie Canning Dr, Leonora	P1482	None	

RESOURCES REQUIRED

The Department can help agencies to collate a basic list of heritage assets, based on the information held by the Department as the owning agency and by Landgate.

Once the basic list is prepared, the owning agency or a consultant on their behalf, will need to compile the remaining information required for the spreadsheet,

including an up-to-date street address and identifying the heritage listings that apply.

Information relating to statutory heritage listings may be found on the Heritage Council's InHerit database, which will have a digital place record for each heritage asset owned by the agency.

<http://inherit.stateheritage.wa.gov.au/Public/>

COMPLETION, USE AND UPDATING

Format

The heritage asset list section should be prepared in PDF.

Upon completion, the Department requests that an agency provides a copy to be accessioned into the Heritage Council's library. The Department will also update the InHerit database to reflect the inclusion of the heritage assets on the agency's Heritage Inventory.

Reporting to Heritage Council and Minister for Heritage

To increase awareness and promote assistance, the Department may use Heritage Inventories to provide information to the Heritage Council and the Minister for Heritage about Government owned heritage assets.

Requirements for updating Heritage Asset List

An agency should consider its heritage asset spreadsheet a flexible, non-static document that should be updated when:

- A heritage asset is acquired by the agency
- An asset becomes newly heritage listed
- A heritage asset is disposed of from the agency's ownership.

The Heritage Inventory should be reviewed to confirm accuracy every five to ten years.

The Department encourages agencies to provide information about any updates to their Heritage Inventory to them.

Stage 1

List of Heritage Assets



Compile a list of heritage assets, and identify places where statutory processes apply.

Stage 2

Condition Reports

Detailed condition reports for State Registered heritage assets, with note of required repairs.

Compile a list of at risk (very poor condition or vacant) heritage assets.

Once an owning agency has completed the first stage of the Heritage Inventory process – to compile and prepare a heritage asset list – the next stage is to report on the condition of heritage assets that are included in the State Register of Heritage Places.

It is good practice for each State registered heritage assets to have a Conservation Management Plan (CMP) prepared, and for it to be used to guide its use and management. If agencies require assistance to commission a CMP, the Department is available to provide advice and guidance, or may be able to prepare the document on the agency's behalf.

To complement the CMP, agencies are encouraged to undertake a condition report of every State registered heritage asset every two years. These condition reports form the second stage of the Heritage Inventory.

The purpose of a Condition Report section is to:

- Regularly report on the condition of State registered heritage assets

- Identify repairs or works that are required
- Compile a list of at risk State registered heritage assets.

WHY REPORT ON CONDITION?

State registered heritage assets are properties that have been determined by the Heritage Council and Minister for Heritage as places that are significant to the State of Western Australia. As such, it is the expectation that agencies are managing and conserving heritage assets appropriately.

An important step is for the owning agency to have a good understanding of the asset's current condition and requirements for repairs or works. This information enables the owning agency to make informed decisions about the asset, and allocate resources as required.

Regular condition reporting over time also enables changes in condition to be monitored, and helps identify what resources are required now and in the future to effectively manage and conserve the asset.

Condition reporting entails the compilation of a list of an agency at risk State registered heritage assets – places that are in very poor condition or vacant. The Heritage Works branch of the Department is tasked to assist State agencies with the management of their vacant and underutilised public buildings, and may be able to help agencies to revitalise, conserve, adapt or dispose of these assets.

CONDITION REPORTING – CONTENT

The Condition Reporting section of the Heritage Inventory should include:

1. A condition report for each State registered heritage asset, including:
 - Condition assessment
 - Notes on required repairs or works programs
 - Information about use – current use, and previously or potential future uses (if known or identified)
 - Photographs recording current condition.

2. List of at risk State registered heritage assets
 - Summarising the information gathered in the condition reports into a spreadsheet listing the State registered heritage assets that are in very poor condition or vacant.

RESOURCES REQUIRED

Part 1 - Individual Condition Reports

The Department can provide a site-specific condition reporting template for each State registered heritage asset that an agency owns or is responsible for. This is to be used and completed by an appropriately experienced heritage professional (staff member or heritage professional) to report on the condition of the asset. The template document will guide the inspection of the property, with particular focus on the identified areas of significance, and elements that may have previously been identified as in poor condition or needing repair.

A site visit for each State registered heritage asset will need to be undertaken to provide an up-to-date assessment of the property. This will require exterior and interior access, and photographs should be taken.

The Department's Heritage Works branch may be able to assist agencies by undertaking the site visit and completing the condition report on their behalf.

The condition reports for all the State registered heritage assets that an agency owns do not need to be completed in one go, and can be spread out over the two-year reporting cycle.

Part 2 - List of at risk RHP Heritage Assets

The spreadsheet of at risk State registered heritage assets should be considered a flexible, non-static document that should be updated each time a new condition report has been prepared and a place is identified as either in poor condition, vacant or unused.

Example – Sample at risk list of State registered heritage assets

Agency name: Department of Planning, Lands and Heritage

Name of Heritage Asset	Location	HCWA identifier	Condition/Use
Old Bristle Kilns	Grandstand Rd, Ascot	P0868	Vacant/unused
Roebourne Police Station, Gaol & Court House	Roebourne	P2319	Vacant/unused
Eucla Telegraph Station (ruin)	Eucla, Dundas	P3558	Vacant/unused

COMPLETION, USE AND UPDATING

Format

The individual condition reports and at risk list should be prepared in PDF, and stored alongside the agency's heritage asset list.

Once a condition report has been prepared an agency must provide a copy to be accessioned into the Heritage Council's library. Each time the at risk list is updated, the Department also requests that a copy is provided so the InHerit database can be updated to reflect the current condition and use of the assets.

Reporting to Heritage Council and Minister for Heritage

To maintain awareness and promote assistance, the Department may provide information about the condition of State registered heritage assets to the Heritage Council and the Minister for Heritage.

Requirements for updating

Condition Reports - The condition report for each State registered heritage assets should be reviewed and updated every two years. It is recommended that State registered heritage assets that have been identified as being in poor condition or vacant have their condition report reviewed every year.

At Risk Heritage List - The at risk heritage list should be updated whenever a condition report notes that a place is of poor condition or vacant.

The Department encourages agencies to provide information about any updates to their condition reports and at risk list.

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Condition Reports

Detailed condition reports for State registered heritage assets, with note of required repairs.

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Stage 3

Thematic History

Thematic history of agency, with analysis of heritage assets that represent agency themes, for agency wide disposal clearance.

The third stage of a Heritage Inventory is the preparation of a Thematic History of the agency. Thematic History helps to provide an understanding of the history and development of the agency, to enable the identification of heritage assets that are representative of the agency's story and allow for agency-wide disposal clearance for heritage assets not considered significant for the State Register of Heritage Places.

The agency will need to engage a historian to prepare its Thematic History section.

The purpose of this section of the Inventory is to:

- Provide an understanding of the history and development of the agency

- Identify heritage assets that are representative of the agency's story
- Assist with disposal clearance for heritage assets.

THEMATIC HISTORY – CONTENT

The Thematic History section comprises two parts:

1. Thematic History of the State Agency
2. Analysis of heritage assets, and identification of representative examples.

WHY COMMISSION A THEMATIC HISTORY?

A Thematic History will provide a clear and concise history of the State agency. It is useful as it provides an understanding about how the agency developed over time, and can be used to promote and celebrate the agency's unique history.

The Thematic history will look at the agency from its inception (or previous iterations) to the present. It is usually presented in chronological order, divided into sections or chapters relating to the contextual history and development of the agency or more generally of Western Australia (i.e. pre-1829, 1829-1850 Early Colonial Years, 1850-1880 Convict Period, 1880-1914 Gold Boom, etc.). The study relates the development of the State agency to contextual social, economic and political events, and identifies decisions relating to the governing and expansion of the State agency and its services.

The study relates the history of the State agency to its building stock through time, including current assets as well as possibly demolished assets or assets no longer in its ownership. It will identify well known and important examples of an agency's building stock, which may be considered particularly significant to its history and development.

For example - the Department of Education's Thematic History would include information about Claremont Teachers' College and Perth Girls' School, both of which are no longer in the ownership of the Department, but which both played an important role in the provision of education services in Western Australia.

ANALYSIS OF THEMATIC HISTORY

The Thematic History will provide the basis for a subsequent stage of analysis, which aims to identify heritage assets that are representative of the agency's story. The analysis may identify one or several heritage assets that represent its historic themes, and that could be considered for entry in the State Register in the future.

Based on this information, the agency can seek a decision from the Heritage Council about which heritage assets should be considered for entry in the State Register of Heritage Places in the future, and which are approved for future disposal.

RESOURCES REQUIRED

The historical research component of a Thematic History should be undertaken by a suitably qualified/professional historian, who may also be able to assist with identifying the best representative examples of each thematic type from the agency's List of Heritage Assets.

The Heritage Assessment & Registration branch of the Department may also be able to assist with the analysis.

COMPLETION, USE AND UPDATING

Format

The Thematic History section should be prepared in PDF. Upon completion, the Department requests that it be submitted to be accessioned into the Heritage Council's library.

Reporting to Heritage Council and Minister for Heritage

If the agency is seeking disposal clearances, the Department will provide the Heritage Council analysis relating to the agency's thematic history and identified representative examples.

Heritage Council will consider which of the agency's non-State registered heritage assets should be assessed for the State Register, and which are approved for future disposal.

Requirements for updating Thematic History

The Thematic History will likely remain substantially unchanged when it is reviewed, which is recommended to take place while an agency reviews and updates its Heritage Asset List (stage 1 in the Heritage Inventory process).

An update to the Thematic History may add more recent historical information. The analysis section may also need to be reviewed, as heritage assets may have subsequently been added to the State Register, or to note those heritage assets that have been specifically identified by the Heritage Council as requiring assessment.

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Strategic Planning

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The fourth stage of the Heritage Inventory is a section that provides analysis of an agency's heritage portfolio, and makes recommendation about Strategic Planning issues.

STRATEGIC PLANNING – CONTENT

The Strategic Planning section includes:

1. Recommendations for:
 - High priority repair and works programs
 - Actions relating to at risk heritage assets
 - Underperforming heritage assets (adaptive reuse, disposal).

2. Analysis relating to recommendations, including references to external documents (Conservation Management Plans, programs of works, costings, feasibility studies, for individual assets).

WHY PREPARE A STRATEGIC PLANNING SECTION?

The Strategic Planning section provides analysis and recommendations relating to an agency's heritage assets.

It takes into consideration the agency's overarching strategic goals and priorities, its requirements for assets, and how the heritage assets continue to meet those needs.

This section will provide analysis of the agency's heritage portfolio, based on the up-to-date information provided in the condition reports and management planning documents. It may also consider any other documentation, including feasibility studies, risk assessments, performance evaluations, and stakeholder expectations.

By analysing this information, the Strategic Planning section can make recommendation as to the high priority actions that are required to improve the condition and usability of an agency's heritage assets, as well as to reduce risk.

This analysis allows for the estimation and allocation of funding for high priority repair and works programs, as well as funding for ongoing and preventative maintenance (often seen to be less of a high priority, but a sound and demonstrable investment in long-term viability and cost-reduction).

RESOURCES REQUIRED

The agency will need to engage a suitably qualified consultant to prepare, or to manage a team of experts to prepare, the Strategic Planning section. The Department's Heritage and Property Services may be able to assist in the preparation and review of the Strategic Planning section.

COMPLETION, USE AND UPDATING

Format

The Strategic Planning section should be prepared in PDF. Upon completion, it is recommended that it is reviewed by the agency's management structure, and provided to the Department for accessioning into the Heritage Council's library.

Reporting to Heritage Council and Minister for Heritage

The Department may provide information about an agency's Strategic Planning section to the Heritage Council and the Minister for Heritage, in order to maintain awareness and promote assistance.

Requirements for updating Strategic Planning section

The Strategic Planning section of the Heritage Inventory can be reviewed and updated as often as required. It may be useful for an agency to coordinate this with the whole-of-agency Strategic

Planning cycle, to allow for the information relating to heritage assets to be integrated into budget and resourcing estimations and submissions to treasury.

For further guidance about strategic asset planning, agencies should consult the Department of Treasury's **Strategic Asset Management Framework (SAMF)**.

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WHERE to GET HELP

THE DEPARTMENT'S WEBSITE

More information in relation to the management and conservation of heritage assets is available on the Department's website at www.dplh.wa.gov.au.

Here you can find more detailed guidance about heritage management and planning tools, adaptive reuse case studies, example scope of works and maintenance plans, and the Government Heritage Property Disposal Process.

THE DEPARTMENT'S HERITAGE SERVICES

The Heritage Services division of Department of Planning, Lands and Heritage may be able to provide further support and one-on-one guidance to State agencies, including:

- Provision of training and education to heritage officers and asset management staff about general heritage matters
- Assistance in the preparation of Heritage Inventories (particularly to identify the heritage assets owned by an agency)
- Preparation of site specific condition reporting templates for State Registered Heritage Assets
- Provision of advice and support in relation to the use or change of a heritage asset
- Preparation of heritage management documentation
- Preparation of Building Condition Assessments
- Assistance in scoping and commissioning thematic histories of an Agency, and subsequent analysis for GHPDP purposes.



Disclaimer: These guidelines have been prepared by the Department of Planning, Lands and Heritage on behalf of the Heritage Council of Western Australia to assist State Government Agencies with the preparation, review and periodic updating of inventories of heritage assets they own, occupy or control.

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