

Cultural Heritage Asset Management Strategy Model

It is recommended that this strategy model be used in conjunction with the:

- *Victorian Government Cultural Heritage Asset Management Principles* and
- *Guidelines for the Implementation of the Government Cultural Heritage Asset Management Principles.*

The purpose of the strategy model is to assist agencies in implementing the Victorian Government Cultural Heritage Asset Management Principles.

A heritage asset management strategy will assist agencies in managing their heritage assets. It will present a consistent approach to managing heritage assets and provide a systematic basis for determining whether significant heritage values may be affected by projects or works. Having a heritage strategy in place may also provide the basis for permit exemptions to streamline cultural heritage approvals from state and local government.

Agencies are encouraged to adapt the strategy model to fit their particular strategic directions and relevant business policies. It should also be incorporated into the corporate plan and any other strategic asset management plan or framework.

A Cultural Heritage Asset Management Strategy will normally contain the following:

1. **Executive Summary**

- Captures the essence of the strategy within the agency context.
- Reinforces that effective heritage asset management should achieve a balance between the efficient provision of government services and conserving Victoria's heritage for future generations.
- Confirms the agency's commitment to cultural heritage asset management as part of normal business.

2. **Introduction**

- Defines cultural heritage assets as being:
 - places and objects of aesthetic, historic, scientific, social or spiritual value;
 - assets already on, or are suitable for inclusion on, the Victorian Heritage Register, Aboriginal Heritage Register or the local government Heritage Overlay together with important furniture, collections and landscapes associated with the assets; and
 - assets that are valued by local communities as contributing to a sense of place.

3. **Legislative Framework and Heritage Standards**

- Outlines specific legislative requirements relating to heritage assets, such as:
 - *Environment Protection and Biodiversity Conservation Act 1999* (Comm)
 - *Heritage Act 1995* (Vic)
 - *Planning and Environment Act 1987* (Vic)
 - *Aboriginal Heritage Act 2006* (Vic)
- Outlines best-practice heritage standards to be applied in the management of heritage assets such as:

- *Burra Charter The Australia ICOMOS Charter for Places of Cultural Significance* (1999)
- *Ask First. A guide to respecting indigenous heritage places and values* (2002)

4. Policy Framework

- References relevant whole of government policies such as:
 - *Sustaining Our Assets* (Department of Treasury and Finance 2000).
 - *Victoria's Heritage: strengthening our communities* (Heritage Victoria 2006).
 - *Victorian Government Cultural Heritage Asset Management Principles* (Heritage Victoria 2009).

5. Strategic Context of Agency

- Identifies the agency's core functions and budgetary considerations.
- Identifies the agency's strategic objectives and service delivery strategy.
- Identifies the agency's Heritage Assets Policy and considers how the policy integrates with the agency's corporate plan and all other strategic asset management frameworks.

6. Identification of Heritage Assets

- References a thematic history prepared for the agency (or identifies when one will be completed).
- Lists the heritage assets within the agency's ownership or responsibility.
- References where cultural heritage significance assessments for the assets can be found (HERMES, hard copy study or electronic publication) or identifies when significance assessments will be completed.

7. Management Action Plan

- A staged strategy to achieve the conservation and management of heritage assets. Includes a list of key actions (such as completing heritage assessments, preparing Conservation Management Plans, development of policy/management tools etc).

8. Asset Maintenance Plan

- Identifies maintenance priorities and develops specific maintenance plans for individual places/objects. This may include:
 - breakdown maintenance
 - preventative maintenance
 - servicing maintenance
 - cyclic maintenance
 - condition-based maintenance
 - specialist heritage requirements
 - scheduled maintenance to address special needs, eg, stonework.
 - maintenance of 'non-built' heritage assets, for example landscapes, archaeological sites, moveable objects and collections
 - guidelines for building managers about the protection of heritage significance on a day to day basis and for future owners/occupiers
 - capital investment plan that includes medium and long term maintenance plans
 - annual program to implement the maintenance program.

9. Redundant Assets Plan

- Identifies a strategy for managing assets with no apparent re-use options.
- Identifies options such as leasing or asset transfer where an asset is unable to meet the service delivery needs of the agency.
- Identifies demolition as the last resort.

10. Asset Transfer Plan

- Policy for any assets proposed for transfer.

11. Strategy Monitoring

- Indicators to monitor performance, including:
 - Heritage conservation outcomes
 - Business outcomes
 - Service delivery obligations
 - Asset portfolio performance requirements
 - Community satisfaction
 - Comparison of actual performance against anticipated performance.

REFERENCES

Cultural Heritage Asset Management Principles by Heritage Victoria October, 2009

Cultural Heritage Strategy 2008-2011, Preserving and promoting our cultural heritage, Melbourne Water, 2008

Guidelines for the Implementation of the Government Cultural Heritage Asset Management Principles by Heritage Victoria. 2009

State Agency Heritage Guide, Management of Heritage Assets, NSW Government Agencies by NSW Heritage Office, 2005

Sustaining Our Assets, Department of Treasury and Finance 2000

Victoria's Heritage: strengthening our communities, Heritage Victoria 2006