THE AUSTRALIA ICOMOS CHARTER FOR THE
CONSERVATION OF PLACES
OF CULTURAL SIGNIFICANCE
(The Burra Charter)

GUIDELINES TO THE BURRA CHARTER:
CULTURAL SIGNIFICANCE

GUIDELINES TO THE BURRA CHARTER:
CONSERVATION POLICY

AUSTRALIA ICOMOS (Inc)

January 1987
THE AUSTRALIA ICOMOS CHARTER FOR THE
CONSERVATION OF PLACES
OF CULTURAL SIGNIFICANCE
(The Burra Charter)

This revised Charter was adopted on 23rd February, 1981.

Preamble
Having regard to the International Charter for the Con-
servation and Restoration of Monuments and Sites
(Venice 1966), and the Resolutions of 5th General
Assembly of ICOMOS (Moscow 1978), the following
Charter has been adopted by Australia ICOMOS.

Definitions
Article 1. For the purpose of this Charter:
1.1 Place means site, area, building or other work, group
of buildings or other works together with pertinent
contents and surroundings.
1.2 Cultural significance means aesthetic, historic, scien-
tific or social value for past, present or future gener-
ations.
1.3 Fabric means all the physical material of the place.
1.4 Conservation means all the processes of looking
after a place so as to retain its cultural significance. It
includes maintenance and may according to cir-
cumstance include preservation, restoration,
reconstruction and adaptation and will be commonly
a combination of more than one of these.
1.5 Maintenance means the continuous protective care
of the fabric, contents and setting of a place, and is
to be distinguished from repair. Repair involves
restoration or reconstruction and it should be treated
accordingly.
1.6 Preservation means maintaining the fabric of a place
in its existing state and retarding deterioration.
1.7 Restoration means returning the EXISTING fabric
of a place to a known earlier state by removing ac-
cretions or by reassembling existing components
without the introduction of new material.
1.8 Reconstruction means returning a place as nearly as
possible to a known earlier state and is distinguished
by the introduction of materials (new or old) into the
fabric. This is not to be confused with either re-
creation or conjectural reconstruction which are out-
side the scope of this Charter.
1.9 Adaptation means modifying a place to suit pro-
posed compatible uses.
1.10 Compatible use means a use which involves no
change to the culturally significant fabric, changes
which are substantially reversible, or changes which
require a minimal impact.

Explanatory Notes
These notes do not form part of the Charter and may be added to by
Australia ICOMOS.

Article 1.1
Place includes structures, ruins, archaeological sites and areas.

Article 1.5
The distinctions referred to in Article 1.5, for example in relation to
roof gutters, are:
- maintenance — regular inspection and cleaning of gutters
- repair involving restoration — returning of dislodged gutters to
their place
- repair involving reconstruction — replacing decayed gutters.

Australia ICOMOS (incorporated)
P.O. Box 77, Grosvenor Street, Sydney,
N.S.W, Australia
Burra Charter first printed 1 August 1981
This format reproduced from
Kerr, J.S., The Conservation Plan, Sydney
The National Trust of Australia (N.S.W.)
Next printing January 1988
Printed by Yavendale Printing, 35 Clarence Street, Sydney
Conservation Principles

Article 2. The aim of conservation is to retain or recover the cultural significance of a place and must include provision for its security, its maintenance and its future.

Article 3. Conservation is based on a respect for the existing fabric and should involve the least possible physical intervention. It should not distort the evidence provided by the fabric.

Article 4. Conservation should make use of all the disciplines which can contribute to the study and safeguarding of a place. Techniques employed should be traditional but in some circumstances they may be modern ones for which a firm scientific basis exists and which have been supported by a body of experience.

Article 5. Conservation of a place should take into consideration all aspects of its cultural significance without unwarranted emphasis on any one at the expense of others.

Article 6. The conservation policy appropriate to a place must first be determined by an understanding of its cultural significance and its physical condition.

Article 7. The conservation policy will determine which uses are compatible.

Article 8. Conservation requires the maintenance of an appropriate visual setting: e.g., form, scale, colour, texture and materials. No new construction, demolition or modification which would adversely affect the settings should be allowed. Environmental intrusions which adversely affect appreciation or enjoyment of the place should be excluded.

Article 9. A building or work should remain in its historical location. The moving of all or part of a building or work is unacceptable unless this is the sole means of ensuring its survival.

Article 10. The removal of contents which from part of the cultural significance of the place is unacceptable unless it is the sole means of ensuring their security and preservation. Such contents must be returned should changed circumstances make this practicable.

Conservation Processes

Preservation

Article 11. Preservation is appropriate where the existing state of the fabric itself constitutes evidence of specific cultural significance, or where insufficient evidence is available to allow other conservation processes to be carried out.

Article 12. Preservation is limited to the protection, maintenance and where necessary, the stabilisation of the existing fabric but without the distortion of its cultural significance.

Restoration

Article 13. Restoration is appropriate only if there is sufficient evidence of an earlier state of the fabric and only if returning the fabric to that state recovers the cultural significance of the place.

Article 2

Conservation should not be undertaken unless adequate resources are available to ensure that the fabric is not left in a vulnerable state and that the cultural significance of the place is not impaired. However, it must be emphasised that the best conservation often involves the least work and can be inexpensive.

Article 3

The traces of additions, alterations and earlier treatments on the fabric of a place are evidence of its history and uses. Conservation action should tend to assist rather than to impede their interpretation.

Article 8

New construction work, including infill and additions, may be acceptable provided:

- it does not reduce or obscure the cultural significance of the place it is in keeping with Article 8.

Article 9

Some structures were designed to be readily removable or already have a history of previous moves, e.g. prefabricated dwellings and poppet-heads. Provided such a structure does not have a strong association with its present site its removal may be considered.

If any structure is moved it should be moved to an appropriate setting and given an appropriate use. Such action should not be to the detriment of any place of cultural significance.

Article 11

Preservation protects fabric without obscuring the evidence of its construction and use. The process should always be applied:

- where the evidence of the fabric is of such significance that it must not be altered. This is an unusual case and likely to be appropriate for archaeological remains of national importance
- where insufficient investigation has been carried out to permit conservation policy decisions to be taken in accord with Articles 23 to 25.

New construction may be carried out in association with preservation when its purpose is the physical protection of the fabric and when it is consistent with Article 8.

Article 12

Stabilisation is a process which helps keep fabric intact and in a fixed position. When carried out as a part of preservation work it does not introduce new materials into the fabric. However, when necessary for the survival of the fabric, stabilisation may be effected as part of a reconstruction process and new materials introduced. For example, grouting or the insertion of a reinforcing rod in a masonry wall.

Article 13

See explanatory note for Article 2.
Article 14. Restoration should reveal anew culturally significant aspects of the place. It is based on respect for all the physical, documentary and other evidence and stops at the point where conjecture begins.

Article 15. Restoration is limited to the reassembling of displaced components or removal of accretions in accordance with Article 16.

Article 16. The contributions of all periods to the place must be respected. If a place includes the fabric of different periods, revealing the fabric of one period at the expense of another can only be justified when what is removed is of slight cultural significance and the fabric which is to be revealed is of much greater cultural significance.

Reconstruction

Article 17. Reconstruction is appropriate where a place is incomplete through damage or alteration and where it is necessary for its survival, or where it recovers the cultural significance of the place as a whole.

Article 18. Reconstruction is limited to the completion of a depleted entity and should not constitute the majority of the fabric of a place.

Article 19. Reconstruction is limited to the reproduction of the form of which is known from physical and/or documentary evidence. It should be identifiable on close inspection as being new work.

Adaptation

Article 20. Adaptation is acceptable where the conservation of the place cannot otherwise be achieved, and where the adaptation does not substantially detract from its cultural significance.

Article 21. Adaptation must be limited to that which is essential to a use for the place determined in accordance with Articles 6 and 7.

Article 22. Fabric of cultural significance unavoidably removed in the process of adaptation must be kept safely to enable its future reinstatement.

Conservation Practice

Article 23. Work on a place must be preceded by professionally prepared studies of the physical, documentary and other evidence, and the existing fabric recorded before any disturbance of the place.

Article 24. Study of a place by any disturbance of the fabric or by archaeological excavation should be undertaken where necessary to provide data essential for decisions on the conservation of the place and/or to secure evidence about to be lost or made inaccessible through necessary conservation or other unavoidable action. Investigation of a place for any other reason which requires physical disturbance and which adds substantially to a scientific body of knowledge may be permitted, provided that it is consistent with the conservation policy for the place.

Article 25. A written statement of conservation policy must be professionally prepared setting out the cultural significance, physical condition and proposed conservation process together with justification and supporting evidence, including photographs, drawings and all appropriate samples.

Article 26. The organisation and individuals responsible for policy decisions must be named and specific responsibility taken for each such decision.

Article 27. Appropriate professional direction and supervision must be maintained at all stages of the work and a log kept of new evidence and additional decisions recorded as in Article 25 above.

Article 28. The records required by Articles 23, 25, 26 and 27 should be placed in a permanent archive and made publicly available.

Article 29. The items referred to in Article 10 and Article 22 should be professionally catalogued and protected.

Words in italics are defined in Article 1.
GUIDELINES TO THE BURRA CHARTER: CULTURAL SIGNIFICANCE

These guidelines for the establishment of cultural significance were adopted by Australia ICOMOS on 14 April 1984. They explain aspects of Articles 6, 23, 25 and 28 of the Australia ICOMOS Charter for the Conservation of Places of Cultural Significance (Burra Charter) and should be read in conjunction with the Charter.

Contents

1.0 Preface
1.1 Intention of Guidelines
1.2 Applicability
1.3 Need to establish cultural significance
1.4 Skills required
1.5 Issues not considered

2.0 The Concept of Cultural Significance
2.1 Introduction
2.2 Aesthetic value
2.3 Historic value
2.4 Scientific value
2.5 Social value
2.6 Other approaches

3.0 The Establishment of Cultural Significance
3.1 Introduction
3.2 Collection of information
3.3 The assessment of cultural significance
   3.3.1 Extent of recording
   3.3.2 Disturbance of the fabric
   3.3.3 Hypotheses
3.4 Statement of cultural significance
3.5 The report
   3.5.1 Content
   3.5.2 Written material
   3.5.3 Graphic material
   3.5.4 Sources

4.0 Procedures for Undertaking the Task
4.1 Brief
4.2 Responsibility for the content of the report
4.3 Draft report
4.4 Urgent action
4.5 Additional expenditure
4.6 Recommendations for further investigation
4.7 Exhibition and comment
4.8 Further evidence
4.9 Permanent archive

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 assessing the cultural significance of a place, preparing a statement of cultural significance and for making such information publicly available. The Guidelines refer to Articles 6, 23, 25 and 28 but do not cover all the matters referred to in those Articles.

1.2 Applicability
The Guidelines apply to any place likely to be of cultural significance regardless of its type or size.

1.3 Need to establish cultural significance
The assessment of cultural significance and the preparation of a statement of cultural significance, embodied in a report, are essential pre-requisites to making decisions about the future of a place.

1.4 Skills required
In accordance with Article 4 of 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, for example, be assumed that any one practitioner will have the full range of skills required to assess cultural significance and prepare a statement. Sometimes in the course of the task it will be necessary to engage additional practitioners with special expertise.

1.5 Issues not considered
The assessment of cultural significance and the preparation of a statement does not involve or take account of such issues as the necessity for conservation action, legal constraints, possible uses, structural stability or costs and returns. These issues will be considered in the development of conservation proposals. Guidelines for the development of conservation proposals are the subject of another document.

2.0 The Concept of Cultural Significance

2.1 Introduction
In the Burra Charter Cultural Significance means "aesthetic, historic, scientific or social value for past, present or future generations".

Cultural significance is a concept which helps in estimating the value of places. The places that are likely to be of significance are those which help an understanding of the past or enrich the present, and which we believe will be of value to future generations.

Although there are a variety of adjectives used in definitions of cultural significance in Australia, the adjectives "aesthetic", "historic", "scientific" and "social", given alphabetically in the Burra Charter, can encompass all other values.
The meaning of these terms in the context of cultural significance is discussed below. It should be noted that they are not mutually exclusive, for example architectural style has both historic and aesthetic aspects.

2.2 Aesthetic value

Aesthetic value includes aspects of sensory perception for which criteria can and should be stated. Such criteria may include consideration of the form, scale, colour, texture and material of the fabric; the smells and sounds associated with the place and its use; and also the aesthetic values commonly assessed in the analysis of landscape and townscape.

2.3 Historic value

Historic value encompasses the history of aesthetics, science and society and therefore to a large extent underlies all of the terms set out in this section.

A place may have historic value because it has influenced, or has been influenced by, an historic figure, event, phase or activity. It may also have historic value as the site of an important event.

Places in which evidence of the association or event survives in situ, or in which the settings are substantially intact, are of greater significance than those which are much changed or in which evidence does not survive. However, some events or associations may be so important that the place retains its significance regardless of subsequent treatment.

2.4 Scientific value

The scientific or research value of a place will depend upon the importance of the data involved, on its rarity, quality or representativeness, and on the degree to which the place may contribute further substantial information.

2.5 Social value

Social value embraces the qualities for which a place has become a focus of spiritual, political, national or other cultural sentiment to a majority or minority group.

2.6 Other approaches

The categorisation into aesthetic, historic, scientific and social values is one approach to understanding the concept of cultural significance. However, more precise categories may be developed as understanding of a particular place increases.

3.0 The Establishment of Cultural Significance

3.1 Introduction

In establishing the cultural significance of a place it is necessary to assess all the information relevant to an understanding of the place and its fabric. The task includes a report comprising written material and graphic material. The contents of the report should be arranged to suit the place and the limitations on the task, but it will generally be in two sections: first, the assessment of cultural significance (see 3.2 and 3.3) and second, the statement of cultural significance (see 3.4).

3.2 Collection of information

Information relevant to the assessment of cultural significance should be collected. Such information concerns:

a) the developmental sequence of the place and its relationship to the surviving fabric;

b) the existence and nature of lost or obliterated fabric;

c) the rarity or technical interest of all or any part of the place;

d) the functions of the place and its parts;

e) the relationship of the place and its parts with its setting;

f) the cultural influences which have affected the form and fabric of the place;

g) the significance of the place to people who use or have used the place, or descendants of such people;

h) the historical content of the place with particular reference to the ways in which its fabric has been influenced by historical forces or has itself influenced the course of history;

i) the scientific or research potential of the place;

j) the relationship of the place to other places, for example in respect of design, technology, use, locality or origin;

k) any other factor relevant to an understanding of the particular place.

3.3 The assessment of cultural significance

The assessment of cultural significance follows the collection of information.

The validity of the judgments will depend upon the care with which the data is collected and the reasoning applied to it.

In assessing cultural significance the practitioner should state conclusions. Unresolved aspects should be identified.

Whatever may be considered the principal significance of a place, all other aspects of significance should be given consideration.

3.3.1 Extent of recording

In assessing these matters a practitioner should record the place sufficiently to provide a basis for the necessary discussion of the facts. During such recording any obviously urgent problems endangering the place, such as stability and security, should be reported to the client.
3.3.2 Disturbance of the fabric
Disturbance of the fabric at this stage should be strictly within the terms of Article 24 of the Burra Charter, which is explained in separate Guidelines.

3.3.3 Hypotheses
Hypotheses, however expert or informed, should not be presented as established fact. Feasible or possible hypotheses should be set out, with the evidence for and against them, and the line of reasoning which has been followed. Any attempt which has been made to check a hypothesis should be recorded, so as to avoid repeating fruitless research.

3.4 Statement of cultural significance
The practitioner should prepare a succinct statement of cultural significance, supported by, or cross referenced to, sufficient graphic material to help identify the fabric of cultural significance.

It is essential that the statement be clear and pithy, expressing simply why the place is of value but not restating the physical or documentary evidence.

3.5 The report
3.5.1 Content
The report will comprise written material and graphic material and will present an assessment of cultural significance and a statement of cultural significance.
In order to avoid unnecessary bulk, only material directly relevant to the process of assessing cultural significance and to making a statement of cultural significance should be included.

3.5.2 Written material
The text should be clearly set out and easy to follow. In addition to the assessment and statement of cultural significance as set out in 3.2 and 3.3 it should include:
a) name of the client;
b) names of all the practitioners engaged in the task;
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: refer to 3.5.4.

3.5.3 Graphic material
Graphic material may include maps, plans, drawings, diagrams, sketches, photographs and tables, and should be reproduced with sufficient quality for the purposes of interpretation.
All components discussed in the report should be identified in the graphic material. Such components should be identified and described in a schedule.

Detailed drawings may not be necessary. A diagram may best assist the purpose of the report.
Graphic material which does not serve a specific purpose should not be included.

3.5.4 Sources
All sources used in the task must be cited with sufficient precision to enable others to locate them.
It is necessary for all sources consulted to be listed, even if not cited.
All major sources or collections not consulted but believed to have potential usefulness in establishing cultural significance should be listed.
In respect of source material privately held the name and address of the owner should be given, but only with the owner’s consent.

4.0 Procedures for Undertaking the Task

4.1 Brief
Before undertaking the task, the client and the practitioner should agree upon:
a) the extent of the place and any aspect which requires intensive investigation;
b) the dates for the commencement of the task, submission of the draft report and submission of the final report;
c) the fee or the basis upon which fees will be paid;
d) the use of any joint consultant, sub-consultant or other practitioner with special expertise;
e) the basis for any further investigation which may be required within the terms of section 4.5 of these Guidelines;
f) the representative of the client to whom the practitioner will be responsible in the course of the task;
g) the sources, material or services to be supplied
by the client;
h) any requirements for the format or reproduction of the report;
i) the number of copies of the report to be supplied
at each stage;
j) copyright and confidentiality;
k) the conditions under which the report may be published by the client, the practitioner or others;
l) the procedure for any required exhibition of the report and consideration of comment upon it.

4.2 Responsibility for content of report
The content of the report is the responsibility of the practitioner. The report may not be amended without the agreement of the practitioner.
4.3 Draft report
It is useful for the report to be presented to the client in draft form to ensure that it is understood and so that the practitioner may receive the client's comments.

4.4 Urgent action
Where it becomes clear that urgent action is necessary to avert a threat to the fabric involving, for example, stability or security, the client should be notified immediately.

4.5 Additional expenditure
Where it becomes clear that some aspect of the task will incur additional expenditure by requiring more investigation or more expertise than has been allowed, the client should be informed immediately.

4.6 Recommendations for further investigation
In respect of major unresolved aspects of cultural significance, recommendations for further investigation should be made only where:
   a) the client has been informed of the need for such investigation at the appropriate stage and it has been impossible to have it undertaken within the budget and time constraints of the task;
   b) further information is anticipated as a result of disturbance of the fabric which would not be proper at this stage, but which will become appropriate in the future (see Guidelines for Article 24 of the Burra Charter).

Such recommendations should indicate what aspects of significance might be established by such study.

4.7 Exhibition and comment
The report for any project of public interest should be exhibited in order that interested bodies and the public may comment and reasonable time should be allowed for the receipt and consideration of comment.

4.8 Further evidence
If after the completion of the report further evidence is revealed, for example by disturbance of the fabric or as a result of further investigation or public comment, it is desirable for such evidence to be referred to the original practitioner so that the report may be amended if necessary.

4.9 Permanent archive
A copy of the report should be placed in a permanent archive and made publicly available.
GUIDELINES TO THE 
BURRA CHARTER:
CONSERVATION POLICY

These guidelines which cover the development of conservation policy and strategy for implementation of that policy, were adopted by Australia ICOMOS on 25 May 1985. They explain aspects of articles 6, 7, 23 and 25 of the Australia ICOMOS Charter for the Conservation of Places of Cultural Significance (Burra Charter) and should be read in conjunction with the Charter.

Contents
1.0 Preface
1.1 Intention of Guidelines
1.2 Applicability
1.3 Cultural significance to precede conservation policy
1.4 Need to develop conservation policy
1.5 Skills required
1.6 Aspects excluded
2.0 The Scope of the Conservation Policy
2.1 Introduction
2.2 Fabric and setting
2.3 Use
2.4 Interpretation
2.5 Management
2.6 Control of investigation at the place
2.7 Control of physical intervention
2.8 Future activities
2.9 Review
3.0 Development of the Conservation Policy
3.1 Introduction
3.2 Collection of information
  3.2.1 Significant fabric
  3.2.2 Requirements and constraints arising out of cultural significance
  3.2.3 Client, owner and user’s requirements and resources
  3.2.4 Other requirements and concerns
  3.2.5 Condition of fabric
  3.2.6 Uses
  3.2.7 Comparative information
  3.2.8 Unavailable information
3.3 Assessment of information
3.4 Statement of conservation policy
3.5 Consequences of conservation policy
4.0 Strategy for Implementation of Conservation Policy
4.1 Introduction
4.2 Contents of strategy
5.0 The Report
5.1 Introduction

5.2 Written material
5.3 Graphic material
5.4 Sources
6.0 Procedures for Undertaking the Task
6.1 Brief
6.2 Responsibility for content of the report
6.3 Draft report
6.4 Urgent action
6.5 Additional expenditure
6.6 Recommendations for further investigations
6.7 Exhibition and comment
6.8 Adoption and review
6.9 Further evidence
6.10 Permanent archive

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. The guidelines refer to Articles 6, 7, 23 and 25.

1.2 Applicability
The guidelines apply to any place likely to be of cultural significance regardless of its type or size.

1.3 Cultural significance to precede conservation policy
The establishment of cultural significance and the preparation of a statement of cultural significance, embodied in a report, are essential pre-requisites to the development of conservation policy. Guidelines for the establishment of cultural significance are the subject of another document.

1.4 Need to develop conservation policy
The development of conservation policy, embodied in a report, is an essential pre-requisite to making decisions about the future of the place.

1.5 Skills required
In accordance with Article 4 of 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, for example, 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 organizations.

1.6 Aspects excluded
These guidelines are directed at the planning process and not the detailed specification of action.
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 particular combination of conservation actions will 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 or recovery of the cultural significance of the place and that are feasible.

2.4 Interpretation

The conservation policy should identify the most appropriate way 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 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:

— those to be responsible for subsequent conservation and management decisions and for the day to day management of the place;
— the mechanism by which policy decisions are to be made and recorded; and
— the means of providing security and regular maintenance for the place.

2.6 Control of investigation of the place

The conservation policy should make provision for the control of investigations at the place in order to prevent investigations that might diminish the cultural significance of the place.

2.7 Control of physical intervention

The conservation policy should include provisions for the control of physical intervention. These controls may identify:

— the situations in which intervention is permissible;
— the likely impact of the cultural significance of any intervention;
— unavoidable intervention; and
— the degree of intervention acceptable for non-conservation purposes.

(Refer to Guidelines to the Burra Charter: Physical Intervention.)

2.8 Future activities

The conservation policy should set guidelines within which future activities such as new works for changing needs may take place.

2.9 Review

The conservation policy should contain provision for review.

3.0 Development of the 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 comprising written material and graphic material. 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:

— the development of a conservation policy (see 3.2 and 3.3);
— the statement of conservation policy (see 3.4); and
— 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

Check and if necessary supplement information as to the nature, extent and degree of intactness of the significant fabric. Fabric includes contents. (Refer to Guidelines to Burra Charter — Cultural Significance, 3.0 and Guidelines to Burra Charter: Physical Intervention, 3.0.)

3.2.2 Requirements and constraints arising out of cultural significance

Identification of desirable actions and controls which would have to be applied to the place to conserve the various aspects of its significance.

3.2.3 Client, owner and user’s requirements and resources
Information about needs, aspirations, current proposals, available finances, etc., in respect of the place.

3.2.4 Other requirements and concerns
Information about other requirements and concerns likely to affect the future of the place and its setting including:
- federal, state and local government acts, ordinances and planning controls;
- community needs and expectations; and
- locational and social context.

3.2.5 Condition of fabric
Survey of fabric sufficient to establish how its physical state will affect options for the treatment of the fabric (refer to Burra Charter 11-22).

3.2.6 Uses
Collection of information about uses, sufficient to determine whether or not such uses are compatible with the significance of the place (refer to Burra Charter 1.10) and feasible.

3.2.7 Comparative information
It may be desirable to collect comparative information about the conservation of similar places.

3.2.8 Unavailable information
Identification of information sought and unavailable that may be critical to the determination of the conservation policy or to its implementation.

3.3 Assessment of information
The information gathered above must be assessed and synthesized in relation to the matters raised in 2.0.

The object of assessment is to develop a conservation policy to be included in 3.4. Strategies for the implementation of the policy will be considered for inclusion in 4.0.

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 investigation at the place;
- control of physical intervention;
- future activities; 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:
- change the place including its setting;
- affect its significance;
- affect the locality and its amenity;
- affect the client, owner and user; and
- affect others involved.

4.0 Strategy for Implementation of Conservation Policy

4.1 Introduction
Following preparation of the conservation policy a strategy for its implementation should be prepared. Strategy is an essential part of any conservation planning. The techniques of strategy preparation are common to many disciplines and are therefore not described here.

4.2 Contents of strategy
The strategy may include information about:
- the financial resources to be used;
- the technical and other staff to be used (human resources);
- the sequence of events;
- the timing of events; and
- the management structure.

The strategy should allow the implementation of the conservation policy under changing circumstances, for example, availability of funds.

5.0 The Report

5.1 Introduction
The report is the vehicle through which the conservation policy is expressed, and on which conservation action is based.

5.2 Written material
Written material will include:
- the statement of cultural significance;
- the development of conservation policy;
- the statement of conservation policy; and
- the strategy for implementation of conservation policy.

It should also include:
- name of the client;
- authorship of the report;
- date;
- brief or outline of brief;
- constraints on the task, for example, time, money, expertise;
- names of all the practitioners engaged in the
task, the work they undertook, and any separate reports they prepared;
— sources (refer to 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 of information, both documentary and oral, consulted during the task should be listed, whether they proved fruitful or not. All sources used in the report must be cited with sufficient precision to enable others to locate them.

In respect of source material privately held, the name and address of the owner should be given, but only with the owner’s consent.

6.0 Procedures for Undertaking the Task

6.1 Brief
Before undertaking the task, the client and the practitioner should agree upon:

a) the extent of the place and any aspect which requires intensive investigation;
b) the dates for the commencement of the task, submission of the draft report and submission of the final report;
c) the fee or the basis upon which fees will be paid;
d) the use of any joint consultant, sub-consultant or other practitioner with special expertise;
e) the basis for any further investigation which may be required, for example, within the terms of section 3.3 of these guidelines;
f) the representative of the client to whom the practitioner will be responsible in the course of the task;
g) the sources, material or services to be supplied by the client;
h) any requirements for the format or reproduction of the report;
i) the number of copies of the report to be supplied at each stage;
j) copyright and confidentiality;
k) the conditions under which the report may be published or distributed by the client, the practitioner or others;
l) the procedure for any required exhibition of the report, consideration of comment upon it and archival storage.

6.2 Responsibility for content of report
The content of the report is the responsibility of the practitioner. The report may not be amended without the agreement of the practitioner.

6.3 Draft report
It is useful for the report to be presented to the client in draft form to ensure that it is understood and so that the practitioner may receive the client’s comments.

6.4 Urgent action
Where it becomes clear that urgent action is necessary to avert a threat to the fabric involving, for example, stability or security, the client should be notified immediately.

6.5 Additional expenditure
Where it becomes clear that some aspect of the task will incur additional expenditure by requiring more investigation or more expertise than has been allowed, the client should be informed immediately.

6.6 Recommendations for further investigations
In respect of major unresolved aspects of the conservation policy or of the strategies for its implementation, recommendations for further investigation should be made only where:

a) the client has been informed of the need for such investigation at the appropriate stage and it has been impossible to have it undertaken within the budget and time constraints of the task;
b) further information is anticipated as a result of disturbance of the fabric which would not be proper at this stage, but which will become appropriate in the future (refer to Guidelines to the Burra Charter: Physical Intervention).

Such recommendations should indicate what aspects of conservation policy or its implementation might be established or assisted by such study.

6.7 Exhibition and comment
The report for any project of public interest should be exhibited in order that interested bodies and the public may comment and reasonable time should be allowed for the receipt and consideration of comment. Where public exhibition is not appropriate, comment should be sought from relevant individuals and organisations.

6.8 Adoption and review
Provision should be made for the formal adoption and review of the conservation policy.

6.9 Further evidence
If after the completion of the report further evidence is revealed, for example, by disturbance of the fabric or as a result of further information, it is desirable for such evidence to be referred to the original practitioner so that the report may be amended if necessary.

6.10 Permanent archive
A copy of the report should be placed in a permanent public archive and made publicly available. Public access to parts of reports considered to be confidential may be restricted for a stated period.