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 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.

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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.