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

These guidelines for the preparation of professional studies and reports were adopted by the Australian national committee of the International Council on Monuments and Sites (Australia ICOMOS) on 23 April 1988. They should be read in conjunction with the Burra Charter.

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1.0 Preface

These guidelines make recommendations about professional practice in the preparation of the studies and reports within the terms of the Burra Charter. Attention is also drawn to the advice about ethical, procedural and legal matters provided in the practice notes issued by various professional bodies.

2.0 Agreements between client and practitioner

Before undertaking a study or report, the client and the practitioner should agree upon:

(a) the extent of the task, for example, up to the preparation of a statement of significance, up to the preparation of a statement of conservation policy or up to the preparation of a strategy for implementation;
(b) the boundaries of the place;
(c) any aspect which requires intensive investigation;
(d) the dates for the commencement of the task, submission of the draft report and submission of the final report;
(e) the fee and basis upon which fees and disbursements will be paid;
(f) the use of any joint consultant, sub-consultant or other practitioner with special expertise;
(g) the basis for any further investigation which may be required, for example, within the terms of 7.0 below or Section 3.3 of Guidelines to the Burra Charter: Conservation Policy;
(h) the representative of the client to whom the practitioner will be responsible in the course of the task;
(i) the sources, material or services to be supplied by the client including previous studies or reports;
(j) any requirements for the format or reproduction of the report;
(k) the number of copies of the report to be supplied at each stage;
(l) copyright and confidentiality;
(m) how the authorship will be cited;
(n) the condition under which the report may be published or distributed by the client, the practitioner or others;
(o) the procedure for any required exhibition of the report;
(p) the basis for comment upon the report and any consequent amendment;
(q) the responsibility for affecting archival storage in accordance with Article 28 of the Burra Charter (Article 32 of the Burra Charter, 1999).
3.0 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.

4.0 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.

5.0 Urgent action

If the practitioner believes that urgent action may be necessary to avert a threat to the fabric involving, for example, stability or security, the practitioner should immediately advise the client to seek specialist advice.

6.0 Additional work

Where it becomes clear that some aspect of the task will require more investigation or more expertise than has been allowed within the budget or the terms of the agreement, the practitioner should advise the client immediately.

7.0 Recommendations for further investigations

In respect of major unresolved aspects of cultural significance, conservation policy or of strategies for implementation of conservation policy, 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 intervention in the fabric which would not be proper at this stage, but which will become appropriate in the future.

Such recommendations should indicate what aspects of cultural significance, conservation policy or implementation might be assisted by such study.

8.0 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, organisations and specialists.

9.0 Adoption and review of report

Recommendations should be made for the formal adoption of the report and for any subsequent review.

10.0 Further evidence

If after the completion of the report further evidence is revealed, for example, by intervention in the fabric or information from other sources, it is desirable for this evidence to be referred to the original practitioner so that the report may be amended if necessary.

11.0 Accessibility of information

All material relating to the cultural significance of the place should be made readily available to increase the common pool of knowledge. Publication by the client and/or practitioner should be encouraged.