



NSW GOVERNMENT  
**Department of Planning**

Heritage Council



of New South Wales

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## **NSW Heritage Grants 2008-2009**

# **Local Government Heritage Management Program Summary Heritage Strategy Report for 2008-09**

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## **Background**

A requirement of the local government heritage advisor funding program is that each council must prepare, adopt and implement a three year Heritage Strategy. The 2008-11 Heritage Strategy must be based on the Heritage Branch Department of Planning publication, *Recommendations for Local Government on Heritage Management* and the nine recommendations contained in this document.

Each Council must then report annually on progress made on the implementation of their Heritage Strategy. The annual report must be prepared by the council's heritage advisor and heritage officer, using a standardised annual reporting template supplied by the Heritage Branch. This template is outcome focused and based on the nine recommendations noted above.

The Heritage Branch has collated the 2008-9 report data from the 74 councils participating in the funding program during the year. This represents 72.5% of the 102 eligible rural and regional councils (Metropolitan councils in the Newcastle – Sydney – Wollongong area were not eligible for funding during 2008-9).

### **Key findings of this Heritage Strategy annual report for 2008-9 are:**

- There continues to be an increase, now 58% of Councils (up from 45% in 2007-8) with an adopted heritage policy. Of these 60% have been updated since 2006..
- 85% of councils are working towards updating their heritage schedules for their comprehensive LEP to meet Department of Planning guidelines and timeframes.
- The heritage advisor program continues to provide an invaluable resource for councils for proactive heritage management and positive outcomes.
- The significant loss of council heritage planners continues to threaten the capacity of councils to deliver on heritage outcomes.
- The majority of councils do not waive or reduce DA fees, but adopt a flexible approach to planning and building requirements resulting in better heritage outcomes.
- Active local heritage funds continue to be very successful. In total, 436 projects were funded (an average of 6 projects per fund) with \$3,228,313 spent on these projects. For every dollar contributed by the Heritage Branch to these projects, \$8.90 was contributed by councils and owners.
- 59% of councils (up from 45% in 2007-8), now have asset management plans (or similar) to manage their heritage assets and 74% have an annual works budgets for their heritage items.
- 2008-9 was the first year for data collection on heritage and sustainability (Outcome 9). Councils are either proactively working with community expectations and promoting sustainability, or still grappling with integrating green concerns into council decision making. There is a need for more guidance and information for Councils on managing heritage and sustainability.

### **The information contained in this report also provides the following benefits:**

- Contributes to the Department of Planning's strategic review of local government.
- Assists the Heritage Branch to target areas of greatest need in future funding strategies and other assistance.
- Forms the basis for a Ministerial announcement on the progress of the NSW Heritage Grants Local government heritage management program.

## Recommendation 1

Establish a heritage committee to deal with heritage matters in your area

### Outcome 1 (Caring for our heritage)

Increased community participation, awareness and appreciation of heritage in the local area

#### Key Performance Indicators

Heritage committee established	Yes <b>65%</b> / No <b>35%</b>
Heritage committee constituted under S377 of Local Government Act	Yes <b>81%</b> / No <b>19%</b>
Heritage policy written and adopted by Council	Yes <b>58%</b> / No <b>42%</b> Date completed <b>2001-2005 21% 2006 + 60%</b> Date reviewed and updated <b>2006 + 39.5%</b>
Heritage committee advice/input to council decision making	Yes <b>66%</b> / No <b>34%</b> <b>Average of 11</b> pieces of advice/input to Council decision making
Local heritage consultants directory established	Yes <b>44.5%</b> / No <b>55.5%</b>
Local services and suppliers directory established	Yes <b>51%</b> / No <b>49%</b>

**Evaluation:** (social, environmental, economic)

#### **1. What do the KPIs tell you about this outcome?**

This year, the number of heritage committees has stabilised at 65%, although the number of committees constituted under S377 has increased to 81%. Those councils that have committees comment that the community are able to make a valuable contribution to the identification, protection, management and promotion of heritage in their local government area. Many councils without a committee comment that the community is too small, or the community is too dispersed and diversified to be adequately represented by a committee. Some council prefer to engage with the community through established groups such as the local historical society.

#### **2. What were the key results or achievements for this year?**

There continues to be an increase (58%) of Councils with an adopted Heritage policy with many councils reviewing and updating this policy since 2006.

#### **3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this**

66% of the established heritage committees provide advice to Councils to assist in their decision making. Some councils report little interest in registrations for their local heritage consultants directory or services and suppliers directory even though they have advertised widely.

#### **4. What will you do next year?**

Heritage committees will continue to involve community members in a wide range of heritage issues and projects. They will continue to implement their Heritage strategies. Some councils will advertise for interested people to be included in councils local services and suppliers or heritage consultant directories and will make the results available for community use.

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## Recommendation 2

Identify the heritage items in your area and list them in your local environmental plan.

### Outcome 2 (Knowing and valuing our heritage)

Increased knowledge and proactive management of heritage in your local area

#### Key Performance Indicators

Community based heritage study completed	Yes <b>85%</b> / No <b>15%</b> Date completed <b>2001-2005 22%, 2006+ 40%</b> Date reviewed and updated <b>2006+ 33%</b> <b>Average of 220</b> heritage items recommended for inclusion in LEP heritage schedule
Aboriginal heritage study completed	Yes <b>19%</b> / No <b>81%</b> Date completed <b>2001-2005 21%, 2006+ 36%</b> Date reviewed and updated <b>2006+ 7%</b>
No. of heritage items included in existing LEP heritage schedule	<b>Average of 117</b> heritage items included in LEP heritage schedule Date completed <b>2001-2005 12%, 2006+ 13%</b> Date reviewed and updated <b>2006+ 24%</b>
Council has gazetted a principal LEP with model heritage provisions in accordance with Standard Instrument (LEPs) Order	Yes <b>42%</b> / No <b>58%</b> Date gazetted <b>2001-2005 13%, 2006+ 19%</b>
Statement of significance for all heritage items in existing LEP	Yes <b>51%</b> / No <b>49%</b> Date completed <b>2006+ 32%</b> Date reviewed and updated <b>2006+ 29%</b>

**Evaluation:** (social, environmental, economic)

#### 1. What do the KPIs tell you about this outcome?

in line with Department of Planning guidelines and timeframes, the majority of councils (85%), are in the process completing or reviewing their heritage studies and updating their heritage schedule for their comprehensive LEP.

#### 2. What were the key results or achievements for this year?

The majority of councils are working steadily and consistently towards the identification of new heritage items and updating of existing heritage item information for incorporation into their heritage schedule for their comprehensive LEP. Councils acknowledge that this is a very big undertaking that is time and resource intensive.

#### 3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this.

Some councils are concerned about a lack of adequate funding for studies and availability of council strategic planning staffing and the need for ongoing involvement in projects for their completion. A further challenge for some councils is that elected council members have not been supportive of heritage study recommendations and are hesitant to fully support the studies with the community or their adoption and incorporation into heritage schedules for the comprehensive LEP.

#### 4. What will you do next year?

Council will complete heritage studies; promote and educate the community and incorporate heritage study findings into their comprehensive LEP according to Department of planning guidelines and timeframes. Some councils also intend to update statements of significance and to prepare an Aboriginal heritage study.

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### Recommendation 3

Appoint a heritage and urban design advisor to assist the council, the community and owners of listed heritage items.

#### Outcome 3 (Caring for our heritage)

Increased community participation and proactive heritage and urban design management in your local area

#### Key Performance Indicators

Site visits	<b>Average of 25</b> heritage site visits undertaken
Heritage/urban design advice given	<b>Average of 26</b> heritage/urban design advice given
Pre DA advice given on heritage/urban design issues	<b>Average of 15</b> pre DA advice given on heritage/urban design issues
Advice to Council DAs provided on heritage/urban design projects	<b>Average of 15</b> advice to Council DAs provided on heritage/urban design projects

**Evaluation:** (social, environmental, economic)

#### **1. What do the KPIs tell you about this outcome?**

The heritage advisor program continues to provide an invaluable resource for councils and communities with proactive management and positive heritage outcomes. Even though the average number of heritage advisor site visits has increased this year, their input into pre-DAs and DAs has reduced due to a downturn in development applications. Heritage advisors have been able to devote more time to strategic heritage advice and planning.

#### **2. What were the key results or achievements for this year?**

Councils have utilised their heritage advisors for pre-DA advice and reduced DA processing time with positive results for heritage items. There has been an increasing awareness of the heritage advisor service in councils and the community which has facilitated sympathetic alterations and additions, maintenance and conservation works for heritage items and surrounding streetscapes.

#### **3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this.**

Challenges involved poor quality heritage reports submissions; heritage as an after thought in the design process; the complexity in application assessments; the need for heritage advice within tight time frames; and a lack of follow through to ensure that conditions of consent are implemented.

#### **4. What will you do next year?**

Councils with Heritage Branch funding assistance will continue to provide a free heritage and urban design advisory service and local heritage funds to the community and heritage owners. Councils will continue to encourage staff to seek heritage advisor input on heritage and urban design issues and DAs.

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**Recommendation 4**  
**Manage local heritage in a positive manner**

**Outcome 4 (Caring for our heritage)**  
**Proactive heritage and urban design management in your local area**

**Key Performance Indicators**

Heritage DCP	Yes <b>47%</b> / No <b>53%</b> Date completed <b>2001-2005 33% 2006+ 33%</b> Date reviewed and updated <b>2006+ 24%</b>
Urban design DCP	Yes <b>27%</b> / No <b>73%</b> Date completed <b>2001-2005 42.5% 2006+ 42.5%</b> Date reviewed and updated <b>2006+ 15%</b>
Waive or reduce DA fees	Yes <b>32%</b> / No <b>68%</b>
Adopt a flexible approach to planning and building requirements	Yes <b>93%</b> / No <b>7%</b>

**Evaluation:** (social, environmental, economic)

**1. What do the KPIs tell you about this outcome?**

Councils are focusing on completing their LEPs for statutory protection of heritage items in their local areas. Many councils are planning to prepare or update a heritage DCP for their local area. With heritage advisor input, many councils acknowledge the benefits of better planning policies and guidelines in the management of heritage and development applications. 93% of Councils adopt a flexible approach to planning and building requirements for heritage items.

**2. What were the key results or achievements for this year?**

Better planning and building outcomes for heritage items are being achieved by council planning officers and heritage advisors working together in developing their statutory management documents that guide the management of heritage items.

**3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this.**

Generally none. Some councils are limited by a lack of funding for studies and staff resources.

**4. What will you do next year?**

Many councils will commence the preparation of a heritage DCP and are working towards the completion of their comprehensive LEP to provide a statutory framework for the protection and management of heritage items in their local government area.

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## Recommendation 5

Introduce a local heritage incentives fund to provide small grants to encourage local heritage projects

### Outcome 5 (Caring for our heritage)

Increased community participation and proactive conservation and management of heritage in your local area

#### Key Performance Indicators

Local heritage fund operational	Yes <b>80%</b> / No <b>20%</b>
Heritage projects funded with this years funding	<b>Total of 436</b> projects completed. <b>Average of 6</b> heritage projects funded this financial year
Total project value	Total <b>\$3,228,313</b> project value
Total local heritage fund contribution	Total <b>\$719,534</b> contributed by local heritage fund
Total owner contribution to project	Total <b>\$2,503,517</b> contributed by local heritage owner to heritage project
Heritage projects that contribute to local tourism	Total of <b>180*</b> heritage projects that contribute to local tourism
Projects created paid employment	Total of <b>278*</b> jobs created
Projects created volunteer opportunities	Total of <b>21,795*</b> volunteer hours contributed

**Evaluation:** (social, environmental, economic) \* data provided this year for these KPIs is not a reliable indication of performance.

#### 1. What do the KPIs tell you about this outcome?

Small grants provided through the local heritage funding program continues to be one of the key incentives available for local government to assist owners of heritage items in undertaking heritage works.

#### 2. What were the key results or achievements for this year?

\$3,228,313 spent on 436 local heritage projects in 2008-9. For every \$1 contributed by the NSW Heritage Grants, \$8.90 was contributed by Councils and heritage owners.

#### 3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this.

Even though local heritage funding program were very well utilised, there were several councils where funding failed to be spent due to various factors including: the broader economic climate; a lack of available heritage trades people; and an inability to complete projects within 12 months. Some councils were unable to operate a local heritage funding program this year due to limited staffing and resources.

#### 4. What will you do next year?

Continue to encourage, promote and advertise the local heritage funding program to the community. Invite and assist heritage owners to undertake heritage projects within the 12 month timeframe.

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## Recommendation 6

### Run a heritage main street program

#### Outcome 6 (Caring for our heritage)

**Council, owners and the community actively participate in attractive and well managed heritage main streets**

#### Key Performance Indicators

Heritage main street committee operational	Yes 20% / No 80%
Heritage main street study completed	Yes 60% / No 40% Date completed 1991-1995 32%, 1996-2000 34%, 2001-2005 21%, 2006+ 6% Date reviewed and updated 2006+ 2%
Heritage main street study recommendations implemented	Yes 88% / No 12 % Date completed 2006+ 36%
Heritage main street program expanded to other main streets in LGA	Yes 42.5% / No 57.5%

**Evaluation:** (social, environmental, economic)

**1. What do the KPIs tell you about this outcome?**

Involvement in the heritage main street program has remained fairly static over the past three years.

**2. What were the key results or achievements for this year?**

Over the last 12 months, councils with active main street heritage committees have been very successful in achieving works to heritage buildings to make them more attractive and economically viable for business owners and local communities.

**3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this.**

The inability to secure funding for works has limited the implementation of the main street programs in some council areas.

**4. What will you do next year?**

Where active, council committees will encourage property owners to engage and implement works that will benefit the owner as well as the local community. Some councils are interested in establishing committees, undertaking studies and implementing the recommendations.

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## Recommendation 7

### Present educational and promotional programs

#### Outcome 7 (Valuing our heritage)

Increased awareness and appreciation of heritage by the Council, owners and the community in your local area

#### Key Performance Indicators

Heritage information available for LGA (eg brochures, website, guidelines etc)	Yes <b>88%</b> / No <b>12%</b> Date completed <b>2001-2005 15%, 2006+ 44.5%</b> Date reviewed and updated <b>2008+ 40%</b>
Heritage promotional events held (eg National Trust Heritage festival, local heritage festivals, heritage awards scheme, main street festivals etc)	<b>Average of 2</b> heritage events held in last financial year
Local/regional heritage tourism strategy completed	Yes <b>30%</b> / No <b>70%</b> Date completed <b>2001-2005 54.5%, 2006+ 31%</b> Date reviewed and updated <b>2006+ 9%</b>
Heritage trail completed	Yes <b>71%</b> / No <b>29%</b> Date completed <b>2001-2005 20%, 2006+ 33%</b> Date reviewed and updated <b>2006+ 33%</b>
Heritage training for staff	Yes <b>47%</b> / No <b>53%</b> <b>Average of 4</b> staff attended training
Heritage training for Councillors	Yes <b>16%</b> / No <b>84%</b> <b>Average of 3.5</b> Councillors attended training
Heritage training/workshops for heritage owners	Yes <b>20%</b> / No <b>80%</b> <b>Average of 10</b> owners attended training
Heritage training /workshops for local professionals	Yes <b>20%</b> / No <b>80%</b> <b>Average of 7.5</b> local professionals attended training

**Evaluation:** (social, environmental, economic)

#### **1. What do the KPIs tell you about this outcome?**

Most councils provide some heritage educational and promotional programs for heritage owners and the community. Informal training for staff, councillors and heritage owners is generally offered on an as-needs basis.

#### **2. What were the key results or achievements for this year?**

Up-to-date heritage information is readily available for the community through 88% of Council websites. 71% of councils have completed a heritage trail and an average of two heritage events were held each year in each council area.

#### **3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this.**

In the last 12 months councils have continued to provide education and promotional programs for heritage, however new initiatives have slowed due to limited staffing and resources and the demands of the comprehensive LEP process.

#### **4. What will you do next year?**

Next year councils will: continue with heritage education and promotion; initiate more web information and brochures; provide staff training; and investigate new opportunities for heritage events.

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## Recommendation 8

Set a good example to the community by properly managing places owned or operated by the council

### Outcome 8 (Caring for our heritage)

Council proactively conserves and manages its heritage assets

#### Key Performance Indicators

Council has a asset management plans with action plans for heritage assets	Yes <b>59%</b> / No <b>41%</b>
CMPs/CMS prepared for state significant heritage assets	<b>Total of 31</b> CMPs/CMS prepared for state significant items this financial year
Annual works budget secured for heritage asset maintenance and repairs	Yes <b>74%</b> / No <b>26%</b>

**Evaluation:** (social, environmental, economic)

#### **1. What do the KPIs tell you about this outcome?**

There has been a steady increase in active council heritage asset management. 59% of councils now have an asset management plans (or similar) for heritage asset maintenance and 74% have an annual works budgets for heritage items. 31 CMPs were prepared for state significant heritage items this financial year, 10 more than last year.

#### **2. What were the key results or achievements for this year?**

Heritage advisors are proactively working with Council asset managers to address heritage requirements for Council owned assets.

#### **3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this.**

A lack of budget for maintenance of heritage assets is a concern. Other challenges include the need to assess all Council owned assets to identify heritage items and then prepare a CMP/CMS to assist in its management.

#### **4. What will you do next year?**

Identify and assess Council properties within a structured framework for asset management. Prepare conservation management plans or conservation management strategies and a scope of works for all heritage items in Council's care and control and budget for maintenance works accordingly.

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## Recommendation 9

Promote sustainable development as a tool for heritage conservation

### Outcome 9 (Caring for our heritage)

Proactive heritage and sustainable development in your local area

#### Key Performance Indicators

Heritage Development Application approvals for adaptive reuse works	Average of 2 adaptive reuse DA approvals
Development Application approvals for regeneration and urban design works	Average of 1.5 urban design /regeneration DA approvals
Heritage Development application approvals for infill and/or additions works	Average of 8 infill/additions DA approvals
Pre- DA advice and advice given on sustainable and energy efficient modifications (power, water, waste, carbon neutral)	Average of 7.5 pre-DA advice and advice given on sustainable and energy efficient modifications
Sustainability and heritage awareness courses for councillors, council staff, heritage owners and community	Yes 13% / No 86.5% Average of 59 people who attended training

**Evaluation:** (social, environmental, economic)

#### **1. What do the KPIs tell you about this outcome?**

This is the first year for this outcome and KPIs. The issues around sustainability are relatively new to councils and they are either proactively working with and promoting sustainability and meeting community expectations, or still grappling with integrating green concerns into council decision making. Of those Councils actively working with sustainability outcomes there is a need for guidance and information on heritage and sustainability: on regeneration; infill and additions; adaptive reuse; as well as green, energy efficient design outcomes for heritage properties.

#### **2. What were the key results or achievements for this year?**

The community and the development industry are supportive of the adaptive reuse of heritage buildings and recognise that heritage items can be appropriately reused and be retained as valuable community assets.

#### **3. Were there any challenges or disappointments that had a major effect on your results? Briefly describe and show what action has been taken to address this.**

There has been little training, guidelines or information made available to date to assist councils, heritage owners and the broader community in terms of what and how to achieve good heritage and sustainability outcomes.

#### **4. What will you do next year?**

Many councils will encourage energy efficient design solutions for heritage places to retain heritage values; investigate further information relating to sustainable and energy efficient modifications; provide specialist training for staff; and provide owners of heritage properties with information on the management of sustainability and heritage.

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