

Conservation management plan consultant model brief

Introduction

The purpose of this document is to guide heritage item owners and consultants in confirming the scope and contractual arrangements for development of a conservation management plan (CMP). It is presented in the form of a template, to be adapted as needed. The document is to be read and completed in conjunction with Heritage Council of NSW *Statement of Best Practice for a CMP*, and the accompanying *Guide to Preparing a Statement of Best Practice*. It is assumed that any CMP prepared with the assistance of this template will also be informed by the *Australia ICOMOS Burra Charter* and its Practice Notes and other available heritage guidance material as well as material specific to the item.

The client/asset owner should be mindful of the following requirements for a successful CMP development process, and should expect their intended heritage consultant to indicate clearly how they are addressing these elements in their process:

- a clear scope of works
- a realistic project budget including funding to support and pay for the consulting team
- an effective workplan for the overall development of the CMP – what are the tasks to be undertaken, who will undertake them, and to what timeframe? Again, the consultant, or consulting team members, can advise on these matters as they relate to their component tasks, and should agree to the workplan
- good communication between team members, with the client and stakeholders – the consulting team leader should consciously plan to facilitate, monitor, and ensure good communication, and to intervene when communication is not happening as it should
- clear definition of the roles and responsibilities of each team member, avoiding duplication and gaps, and ensuring integration of the team's work
- appropriate specialist and expert inputs
- peer review of the draft CMP.

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Contents of a consulting brief

Information	Comment
<h3>Introduction</h3> <p>(Client name) wishes to commission a consultant or consultant team to prepare a Conservation Management Plan for (item name).</p> <p>The heritage significance of (item name) has/has not been assessed.</p> <p>(item name) is currently listed on (name of Register or Planning Scheme). The key reports relevant to this brief are listed below.</p>	<p>This brief could be adapted to cover just a heritage asset action plan, conservation policy or implementation strategy.</p> <p>Explain what you know about the significance of the item, including any previous research (or an earlier CMP) that can be available to the consultant.</p>
<h3>Study area</h3> <p>The study area for the CMP is (describe the extent of the item and boundaries). The study area is shown on the attached (plan or map).</p> <p>The consultant will be required to confirm and describe the site and the curtilage of the heritage item.</p>	<p>Include helpful details about location. Attach maps or plans.</p>
<h3>Requirements</h3> <p>The CMP is to be prepared in accordance with the principles and processes defined in the Australia ICOMOS Burra Charter and Practice Notes.</p> <p>The CMP must also be informed and guided by the Heritage Council NSW <i>Statement of Best Practice for a CMP</i> and the accompanying <i>Guide to Drafting a CMP</i>. The consultant will be required to familiarise themselves with these documents, which are attached to this Brief.</p> <p>The CMP will be prepared in five stages:</p> <ol style="list-style-type: none">understand the itemassess significanceidentify issuesdevelop conservation policiesdevelop an action plan. <p>The consultant is required to provide a brief draft report documenting each stage for review by (client name) before proceeding to the next stage.</p>	<p>Attach the Statement of Best Practice for a CMP and the Guide.</p>

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The final CMP will be an integrated compilation of these stage reports.

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It is expected that the CMP will also include:

Use this section to list any other specialist components you know are needed for this particular project such as an archaeological or a landscape assessment and policies to implement the findings

Existing information

List any reports or documents available that are relevant to the task of the consultant.

List the base plans or plans of the site, area, buildings etc available to the consultant.

Budget and Timing

The budget available for the preparation of the CMP is (\$ or in the range \$ - \$) (ex GST). The available budget is to cover all fees, expenses and consultation as well as including specialist subconsultants, overheads, insurances and disbursements including (travel, accommodation etc). (Client name) can help with (list any resources or support you will provide).

The timing for the project is as follows:

- (date) consultants commissioned
- (date) project plan (or work plan) submitted
- (date) draft Heritage Assessment submitted for review
- (date) draft Policy submitted for review
- (date) draft Action Plan submitted for review
- (date) final CMP submitted.

Payments will be based on completion of each milestone. The following schedule of payments is proposed, unless otherwise agreed:

- 10% commencement of project (or submission of work plan)
- 25% completion of the draft Heritage Assessment
- 25% completion of the draft Policies
- 15% completion of draft Action Plan

You can detail the milestones to be achieved or just set the final date and let the consultants propose the milestone dates.

A payment schedule should reflect the work completed at each stage. These percentages are indicative only and align with the milestones above for illustrative purposes.

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- 15% draft CMP submitted
- 10% submission of final CMP.

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Progress and final reports

The consultant shall provide staged reports and the Final Report in MS Word and PDF format. Electronic files of diagrams or visuals will be provided in their originating software format and in PDF.

Client liaison

The consultant shall meet with (client or steering committee) at least (number) times during the project.

A specific number of meetings at key review points in the project should be defined.

Contract

The contract between (client name) and the appointed consultants will be based on (name of standard contract). This brief and the proposal submitted by the appointed consultant will form part of the contract documentation.

Some clients will have their own standard contract. Alternatively, the Australian Standard AS4122- 2000 General conditions of contract for engagement of consultants.

Confidentiality

The consultant agrees to keep confidential all materials supplied by the client that are designated 'Commercial in Confidence' or have any other confidential status.

The consultant warrants that all material used in the CMP from sources other than the client will not be in breach of any confidentiality requirements or conflict with other parties' intellectual property rights.

These clauses are designed to protect the client and consultant and should be varied to suit the circumstances.

Copyright

The content of the CMP may not be amended without the agreement of the consultant – which shall not be unreasonably withheld. This requirement excludes editing, format and design changes which do not alter the meaning.

Copyright and ownership of the report will be vested jointly with the client and consultant (include where applicable "and any Indigenous organisation that represents their community"). The client and consultant will have a free, perpetual licence to use

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the report and the material contained within it, with due acknowledgement.

Comment

Responding to this brief

To respond to this brief, the consultant should prepare a short fee proposal containing at least the following information:

- Approach and methodology, including any research and consultation to be undertaken
- Team, including skills, experience, proposed project role and level of time input
- Examples of similar projects undertaken by the team or team members
- Proposed budget and timing
- A breakdown of the total fee into professional fees and expenses, and a breakdown of fees, expenses and total time by project stage or component
- Clear indication of any exclusions
- Any variations to the terms and conditions contained in this brief and the proposed contract.

You may wish to highlight specific skills that must be included on the consultant team.

Other

Proposals must be submitted by (date and time) to (email address).

For more information

For more information about this project please contact (person, title) on (phone) or (email).

Ensure the person listed is available during the proposal period.

Roles and responsibilities

Developing a CMP typically involves a range of people and organisations with different roles and responsibilities.

Client (e.g. owner or manager)

Usually responsible for commissioning a plan, developing the brief, arranging the budget, managing the project, providing information to assist with the development of the plan, reviewing the draft plan and generally ensuring that the plan addresses the client's key interests and concerns.

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Consultant or consultant team

Responsible for the doing the project work, for all research, inspections, consultations (including inside the team and externally), analysis, drafting and development of the plan in line with the brief, statutory requirements, and industry standards.

Heritage NSW

Responsible for administration of the *Heritage Act 1977* and providing general advice about heritage items and conservation management, with a particular focus on items of state-level significance.

Local government/council

Responsible for administration of the local planning and heritage systems and providing general advice about heritage items and conservation management, with a particular focus on items of local-level significance.

Stakeholders

There can be a wide range of stakeholders for a heritage item, including those who have cultural and other important associations, those who are knowledge-holders, and those deeply concerned with ongoing protection and management. Stakeholders can be a key source of information, and have important views and roles regarding constraints, opportunities and even management and responsibilities.

References

[Australia ICOMOS Burra Charter and Practice Notes](#)

[Conservation Management Plan Checklist](#)

[Guidance on Developing a Conservation Management Plan](#)

[Statement of Best Practice for Conservation Management Plans](#)

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Authors

Duncan Marshall (AM) and Positive Solutions.

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