



# **TOWN OF CLAREMONT**

## **Heritage Management Plan**

**April 2005**

**Prepared by:**  
**Edited by:**

**Gaye Nayton - Heritage Officer**  
**Peter Dockett – Acting Manager of Development Services**

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## 1.0 INTRODUCTION

The provisions of the Town of Claremont Town Planning No.3 (“TPS”) require the Town of Claremont (“the Town or TOC”) to manage heritage within the municipal bounds. Effective heritage management is also an important tool in helping the Town of Claremont implement the Strategic Plan and in particular the mission statement, outlined below:

*“Develop a vibrant, harmonious and safe village.  
Embracing the future, respecting the past.”*

Due to the complexity of heritage management issues and the objective of Administration to provide efficient services to the ratepayers, the following tasks have been identified to implement heritage management in relation to the mission statement:

- The preparation and management of heritage lists;
- Definition and preparation of transparent rationale for heritage listing selection;
- The preparation of criteria to aid the decision making process on listing, delisting, demolition and development proposals;
- The development of policies, strategies and procedures to manage heritage issues through the planning process; and
- The development of incentives for heritage retention of recognised places.

In order to implement the above tasks and framework a Heritage Management Plan (“HMP”) is required. The purpose of the HMP is to build upon the existing heritage management tools and data the Town already has by implementing changes in a constructive and well-managed process. In particular the HMP builds upon Council’s Heritage Conservation Strategy 2000 prepared by Council’s Heritage Advisory Committee (HAC), which incorporated community input and suggestions by the Heritage Council of Western Australia (HCWA).

This management plan is intended to outline what is required to manage, protect and enhance heritage elements within the Town of Claremont. It therefore includes but is not inclusive to heritage- based projects. The document is intended as an overview which will determine the current situation of management policies and procedures, what management change is needed and to prioritise tasks to the year 2010 with the aim of achieving change efficiently to ensure effective management in the future.

### 1.1. History of heritage management

Local authorities are required under the provisions of the *Heritage of WA Act 1990* (“the Act”) to prepare a list of buildings and places that are, or may become of “cultural heritage significance”. This list of buildings is defined as a Municipal Inventory (“MI”).

In 1991 the Town commissioned heritage consultants to undertake its Built Environment Survey (“BES”). The BES’s objective was to identify buildings, sites, significant trees and streetscapes important to the environmental character of the Town.

In 1992 the Council adopted the BES as the MI. Later in 1998 the BES was also adopted as the Schedule of Historic and Other Buildings and Places referred to in TPS as the Schedule.



The Town's prompt response to the requirements of the Act meant that the Town was in many ways pioneers of heritage management in the State. This meant that there were no established procedures for the Town's heritage consultants to follow.

To this effect the Act had no instructions as to how the MI was to be prepared and the newly formed Heritage Council of Western Australia (HCWA) was focused on preparing and implementing a State Register of Heritage Places. Based on this the Town had to utilise criteria utilised by the National Trust of Australia ("National Trust") to prepare the MI. The consultants therefore utilised a National Trust's descriptive classification scheme with the following classification system:

- *Significant;*
- *National Trust Classified;*
- *Historic Site;*
- *Potentially Significant;* and
- *Modern Significant.*

All the sites covered by these classifications were listed on a map which showed all the significant places included in the BES. By 1995 short assessment forms based on the National Trust model had also been prepared for the *Significant*, *National Trust Classified* and *Historic Site* categories.

As heritage management practices in Western Australia became more established the National Trust method of classification became superseded by methods based on HCWA assessments and the Burra Charter (1979 revised 1999). As ratepayers became more familiar with the idea of heritage listing and development pressures on the town's infrastructure grew, inadequacies in the BES assessments and the Town's heritage practices were identified. The Town has attempted to address this growing problem by creating a dedicated Heritage Officer position, firstly on a part-time basis then on a full-time basis.

The Heritage Officer commissioned consultants in 2002 to review the problems with the MI. The following problems were identified:

1. Record keeping;
2. The listing of places was based only on architectural assessment and there was a lack of information provided by the architectural assessment;
3. The lack of an historical framework to provide the background against which to assess local significance;
4. The consultation process with owners; and
5. The extent of the coverage of the original BES.

The consultants also highlighted some problems within the management of heritage which affected the MI. These were:

- The lack of management categories to rationalise protection of places under the provisions of the TPS; and
- The nature of the heritage provisions within TPS.

As outlined above the Town has employed a full-time Heritage Officer since April 2003 to address these problems.



## 1.2. History of heritage management as of April 2005

The following outlines the work undertaken for heritage management up to April 2005:

- The 2002 recommendations for the MI review have been prioritised and the review progressed;
- A written list of places deemed to be included on the MI and Schedule of Historic and Other Buildings and Places (“the Schedule”) has been finalised and the owners affected informed;
- A heritage brochure explaining the historical process, the creation the lists and what listing means has been published and sent to owners of listed places;
- Separate MI and Schedule lists have been created from the master list and are available at front counter for viewing;
- Heritage information has been added to the Town’s website, including a master list of listed places and details of the Western Australian Local Government Association Heritage Loan Scheme;
- A summary of reports on the impact of heritage listing on house prices has also been sent to all real estate agents identified as working within the Town. This action was modified from a recommendation contained in Council’s Heritage Conservation Strategy 2000;
- A joint workshop of HAC members and Councillors was conducted to establish guidelines for removing places from listing during the MI review. The initial guidelines have been refined and formulated into a draft set of tables for inclusion into the officer reports;
- Correspondence and other procedures for nominations for listing, requests for removal from listing and changes in heritage status have formulised;
- Procedures for the up-dated assessments are undergoing refinement, a section has been added which provides a list of heritage and non-heritage fabric to facilitate planning approvals. Also a separate memo for the heritage officer has been added to allow the consultant a place to air any non-heritage issues surrounding a particular place which he feels should be brought to Council’s attention. In 2004 a process of co-authoring assessments was initiated with the Heritage Officer supplying the historical, social and scientific values assessment to supply Council with a more balanced assessment while keeping the overall cost of the assessment low;
- A total of 68 individual places, groups or precincts have gone before the HAC and Council between April 2003 and March 2005;
- Additionally a total of 74 ‘Modern Significant Places’ have been removed from listing;
- The ‘Modern Significant Place’ category has now been completely reviewed;
- A total of 17 ‘Potentially Significant’ places have been either removed from listing or moved into the ‘Significant Place’ category, 20 other ‘Potentially Significant’ places are in the process of review;
- 24 requests for removal of ‘Significant Places’ from the lists have been processed;
- One group of shops, a shopping precinct and four groups of significant trees have also been added to the heritage lists;
- Recommendations for development mitigation procedures within the ‘Town Centre Zone’, including nomination of some places for heritage listing have been considered by Council to determine if Council wished to start procedures for actioning the recommendations;
- The heritage provisions in TPS have been assessed and new draft provisions prepared as an Amendment to the TPS;



- Administrative checklists have been created to cover procedures such as liaising with the planning section, maintenance and refurbishment of TOC heritage listed buildings and processing demolition and de-listing applications;
- A policy and guidelines for the creation of archival records of de-listed places have been adopted;
- The Heritage Officer has provided comments on Council projects such as the Residential Design Guidelines, Foreshore Management Plan, and Town Centre Plan;
- Low cost initiatives contained in the Heritage Conservation Strategy 2000 have all been carried out; and
- The historical framework called for as part of the Municipal Inventory Review has been researched and written to 1921. It identifies four periods of development between 1850 and 1921 and characterises the built environment and surviving heritage of each period.

#### **1.4. Moving Heritage Management Forward**

##### **1.4.1. Aims**

The aim of effective heritage management at the local government level would be to have stable well-managed heritage lists which enjoyed a high level of community acceptance.

To be stable the lists need to:

- Incorporate all items deemed by the community to be of cultural heritage significance.
- Have a clearly understood and accepted rationale for listing and ranking places.
- Be based on a sound and rounded knowledge base.
- Be accepted by the owners of listed places.

To gain widespread owner acceptance the lists needs to:

- Be managed in a way which insures the protection of heritage while allowing flexibility to meet owner needs.
- Management needs to deliver clearly visible benefits to owners to offset possible development restrictions.

To be effective heritage management also needs to deliver on community and Council expectations which are encapsulated in Council's mission statement

*“Develop a vibrant, harmonious and safe village.  
Embracing the future, respecting the past.”*

This incorporates a vision of Claremont as a heritage village which, while open to development, needs that development to enhance, not fight against, it's past. This requires planning and heritage management that has a wider vision than case-by-case planning applications. Case-by-case management is encouraged by the state R-Codes 2002 which “consider each place as a self-contained entity with little regard to the issues of neighbourliness, amenity and general attractiveness” (Hocking 2003:5). This approach leads to development that can eat away at the heritage character and amenity of an area. To



effectively enhance character and amenity a management vision that is more area based is required.

Enhancing heritage character and amenity is an important tool to providing economic benefit to owners. One of the most difficult problems in balancing new development and heritage management in Western Australia, and therefore in Claremont, is owner/developer perception that heritage listing de-values the market value of a property.

*Owners will not be happy with heritage listing while they perceive it as de-valuing their property.*

Yet research into the impact of heritage listing on real estate prices from Australia and around the world has shown that heritage listing generally has a long-term beneficial impact on property price (Heritage Council of Western Australia 2001, Rypkema n.d, Clarion Ass. of Colorado 2002).

No one factor determines property value either negatively or positively. Heritage is very closely intertwined with character and amenity with the values reinforcing one another but they only form part of the picture which influences property price. However, research in areas where heritage listing has a longer history have shown that;

- Heritage properties tend to resist downturns better than other properties;
- Demands for heritage houses is generally greater than for other residential property with shorter sale periods and greater buyer interest;
- Heritage buildings tend to appreciate in value at a faster rate than non-heritage building stock and re-cycled commercial heritage building stock tends not to age as quickly as modern counterparts and therefore requires less refurbishment; and
- Retaining heritage stock has positive sustainability outcomes:
  - Life-cycle costing has shown that older housing cost less to maintain and occupy over the long-term life of the building than modern housing;
  - A study over 30 years showed that the cost of demolishing existing houses and rebuilding and maintaining the new housing was double the cost of refurbishing and maintaining the existing houses; and
  - It reduces demolition and new construction waste in landfill which is a significant component (studies have show it forms 20% in Canadian landfill sites).
- It has a positive effect on social cohesion and community.

All these trends are found to be particularly strong in towns and suburbs which:

- Have a significant stock of heritage buildings;
- Have heritage controls to protect the heritage building stock; and
- Have designated heritage areas.

Heritage management within Claremont intends to maximise the potential for these trends to occur within Claremont by managing development to retain a significant stock of heritage buildings, by providing Council with the necessary tools to manage new development in a manner which enhances heritage streetscapes and by providing a more holistic management approach which identifies and enhances heritage areas.





To help define heritage areas and provide guidance on suitable development Council Administration commissioned new Residential Design Guidelines (Hocking 2003) which catalogued the main architectural styles in precincts across the Town and grouped them into possible Special Control Areas based on their heritage nature. The MI review criteria also encourages retention of clusters with the criteria for removal from listing being less vigorous for houses which are not within heritage streetscapes or areas. Within the area of customer service are several initiatives to help maintain and present heritage buildings and to enhance the streetscape of identified heritage areas.

#### **1.4.2. Overall Management Strategy**

Heritage management within the Town falls into four main areas. These are:

- Managing the MI;
- Managing development through planning provisions and the Schedule of Historic and Other Buildings and Places referred to in the TPS;
- Managing heritage records; and
- Customer service and providing heritage benefits.

These four aspects of management are threads that are continuously being worked on, however the projects which flow from them are prioritised to:

- Firstly, inform ratepayers of the current situation;
- Secondly, provide a firm basis of knowledge from which to make heritage decisions;
- Thirdly, put in place a framework of policies, procedures and TPS changes to support the effective management of places through the TPS;
- And lastly, manage this in an efficient way through a series of steps which build up the necessary knowledge and supporting internal framework.

For example establishing clearly defined and supported levels of significance for listed places formally linked to levels of protection under the TPS is vital for Council's day to day management of decisions regarding heritage places. However, this cannot occur until a full range of assessment criteria have been formulated. This in turn needs a solid base of knowledge regarding Claremont's past and the aspects of it which were most important to that past.

Therefore the steps are to:

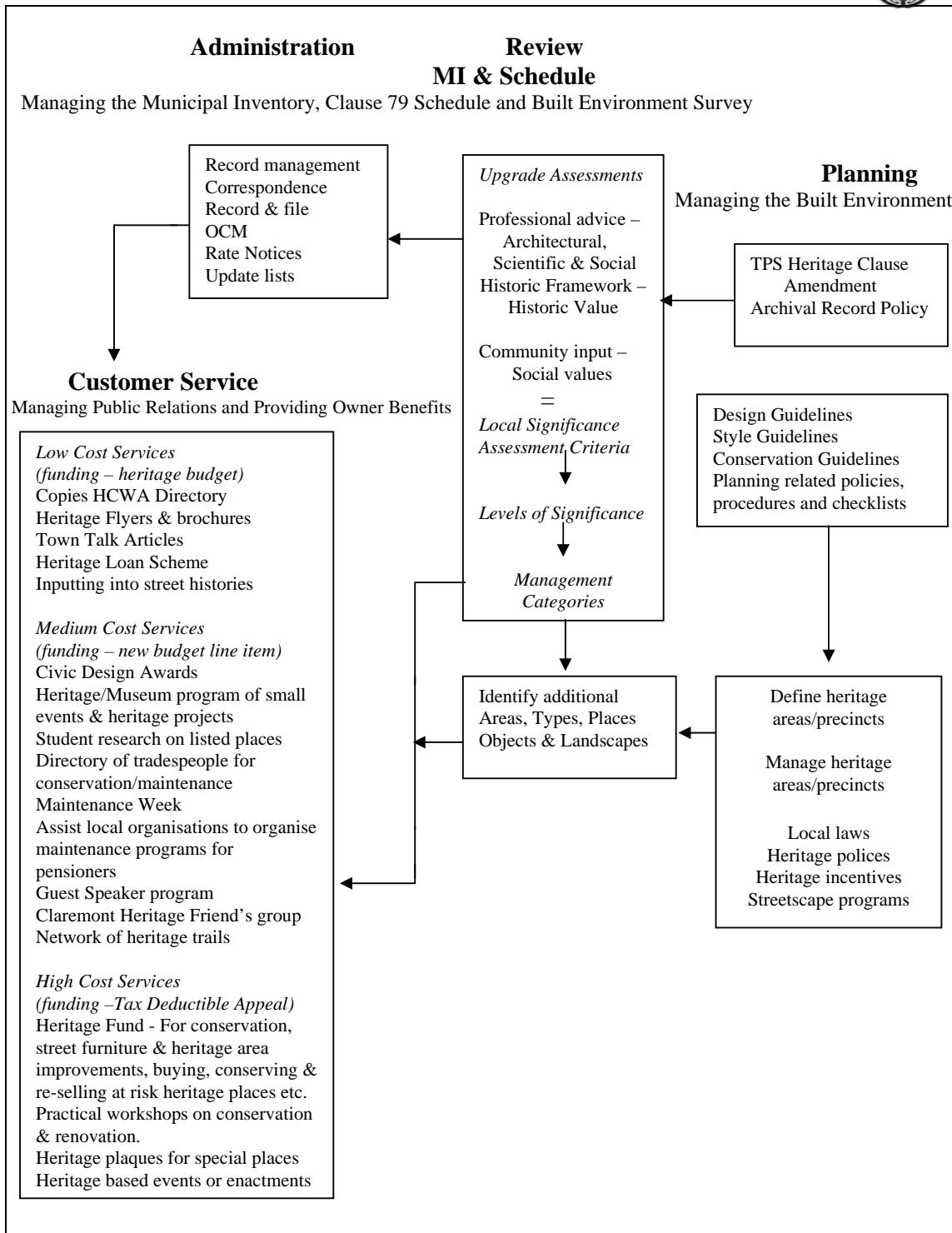
- Firstly, create a thematic historical framework which shows clearly the development phases of Claremont and what were the important aspects of each phase;
- Use this to define what was significant about each phase;
- Use the significant aspects from phases to create overall levels of local significance;
- Use levels of significance to create management categories defining acceptable change and development for places with that level of significance; and
- Measure each listed place against the defined significant aspects and place into management categories.



These steps will result in Claremont having levels of significance and heritage protection which are both defensible and understandable to ratepayers and the Town Planning Commission. Figure 1 shows the main threads and steps proposed by this management plan.

**Figure 1 Heritage Management Flow Chart**





## 2.0 MANAGING THE MUNICIPAL INVENTORY



The Town of Claremont is required under the Heritage of Western Australia Act 1990 to maintain a list of places that are, or may become of “cultural heritage significance”. In 1991 Town of Claremont commissioned heritage consultants to undertake a survey of the built environment which identified places of cultural heritage significance. This survey known as the Built Environment Survey (BES) was adopted as the Council’s MI in 1992.

## **2.1. Municipal Inventory Review**

In recent years there has been some confusion as to which heritage lists the Town keeps and what properties are included on them. There has, in particular, been a great deal of confusion about how many properties are on the MI and what the listing means even within Town staff. The MI has been reviewed in 1995 and 2000 as required under the WA Heritage Act 1990. However, management of the MI is clearly a problem area and this prompted Council to commission a review of MI management in 2002. This review recommended:

- 2.1.1 An accurate list of the places considered to be included on the MI, and adopted as the Schedule attached to TPS, should be agreed and owners notified.**
- 2.1.2 This list should be transferred to the HCWA Heritage Inventory Software already purchased by the Town to provide a standard and easily updated database.**
- 2.1.3 Assessments of all places should be upgraded to include a photograph and information to comply with the database fields. This includes up-to-date statements of significance of aesthetic, historic, scientific and social values, degrees of significance and physical condition. It also includes recommendations of management of the place as a heritage place.**
- 2.1.4 Development of a thematic historic framework for the Town to ensure the MI/Schedule is representative of all periods of development.**
- 2.1.5 Carry out a heritage survey in areas not currently represented in the MI/Schedule.**
- 2.1.6 Assign levels of significance to places and link them to levels of management protection.**
- 2.1.7 Review the TPS provisions which relate to heritage.**
- 2.1.8 Carry out consultation with owners of heritage places as part of the review process.**
- 2.1.9 Consider the identification of heritage areas or precincts as part of the review process.**

These recommendations have been broken down into a series of actions with a timetable attached to them. Reviewing the TPS heritage provisions, the identification of heritage areas and some aspects of managing a heritage place are planning matters and are included under the section **MANAGING HERITAGE**.

## **2.2 Actions and Timetable**

Figure 2 shows a graphic summary of the actions and timetables. Detailed lists of actions are included in Appendix 1.



**2.2.1 An accurate list of the places considered to be included on the MI, and adopted as the Schedule attached to TPS should be agreed and owners notified**

All actions associated with this recommendation have been completed.

**2.2.2 Assessments of all places should be upgraded to include a photograph**

A photographic survey has been carried out and forms a digital database for management. However, it will take considerable officer time to create titled pages for inclusion in the BES documentation and budget funding for colour photocopying of the necessary number of A4 sheets. The action has therefore been timed for later in 2005.

**2.2.3 Upgrade assessments and formulate assessment criteria**

The 1991 BES employed mainly architectural assessment criteria for the assessment of structures. However, heritage assessment in Western Australia now follows the HCWA including a range of criteria which includes aesthetic, historic, scientific and social values, degrees of significance, physical condition and includes areas around structures if they are part of a place. They also follow the Burra Charter (1999) directive by including more than one discipline in the assessment process. This directive was established because each discipline looks at a heritage place in a different way. These differences are put most succinctly by the Heritage Assessment Guidelines for the N.S.W. Department of Planning (1990):

- Architects look at Age, Style, Designer, Details, Construction and Materials of a building. They are looking at what the building can tell us about itself;
- Historians look at Context, Association, Events and Social Significance to the community. They are looking at what the place or building can tell us about the broader community within which it is located;
- Archaeologists look at the potential of the place to expand our knowledge of the past through archaeological investigation. They are looking at what the place or building can tell us about the people who built and used it and the broader community of which they were a part.

Council heritage documentation until 2004 has been compiled utilizing only the architectural viewpoint. This has created some problems for Council when assessments are challenged in the Town Planning Commission Tribunal process. To provide Council with more rounded assessment documentation assessing historic, scientific and social values more fully without adding significantly to consultant costs from the start of the financial year 2004/2005,



Figure 2 Municipal Inventory Review Timetable of actions

PROJECTS	Completed	In progress	2nd half 2004/5	1st half 2005/6	2nd half 2005/6	1st half 2006/7	2nd half 2006/7	2007/8	2008/9	2009/10
<b>M. I. REVIEW</b>										Review
<b>Accurate List/Inform owners</b>	✓	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Formulate assessment criteria</b>	Review Criteria ✓ Architectural Criteria. ✓	Historical - thematic framework, Scientific - professional expertise, Social - professional expertise & community input to social values		Community input into social values						
<b>Photographic record of places</b>	✓									
<b>Upgrade assessment documentation</b>		Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Thematic historical framework</b>		Draft	Draft	OCM to Adopt						
<b>Management Categories</b>				Research	Draft report & policy to OCM	Apply categories to individual listed places	Ongoing	Ongoing	Ongoing	Ongoing
<b>Finalise town survey</b>		Town Centre				Identify additional areas, types & places	Initiate assessments	Identify significant trees/ landscapes	Assess	Both Ongoing
<b>Create heritage database</b>						Collate information create database	Collate information create database	Create CD_ROM for public information		



assessments have been carried out jointly between the architectural consultant and the Heritage Officer. The thematic framework, once completed, will also allow the assessments to be fully grounded on significant issues which are important to Claremont as a local area. Public consultation to determine strongly held community social values is also planned but is dependent on funding availability.

The new assessments will provide much more useful information to inform development application processes and heritage listing decisions than the 1991 assessments which are brief, consisting of only a few notes and a photograph. Therefore all the 1991 assessments should be upgraded to the new format.

Criteria for making review decisions regarding the existing categories of significant places and recommending removal from listing during the review have been discussed at both workshop and Council level. Approval has been given to implement the progressive amalgamation of the various categories of significant places into one category of Significant Place, which will then be sorted by management categories based on the level of heritage value of each place. Criteria for removing places from listing are still undergoing refinement and decision criteria to help Council make a range of heritage decisions are in draft form.

#### **2.2.4 Development of a thematic historic framework for the Town to ensure the MI/Schedule is representative of all periods of development**

Usually such an overview is drawn together prior to selecting places to heritage list. In the case of Claremont the selection of places was based on architectural assessment and the familiarity of the consultant with the area. This however, leaves the resulting list with no clearly explained framework to explain why some places were listed and others not.

This project is therefore relatively urgent as it will provide a sound basis for heritage arguments of local significance. A draft document has been completed to the year 1921 and it is intended to finalise the draft by 30 June 2005. Once completed and adopted the framework should be made public as part of a continuing public awareness campaign.

#### **2.2.5 Assign management categories to places**

The existing heritage categories are descriptive rather than graded and all are treated equally under the current TPS provisions. The need for reform in this area is urgent but effective reform is dependant on other management projects being completed or developed.

The 2002 recommendations and the Local Government Heritage Working party draft discussion paper suggest that the HCWA categories of exceptional, considerable and some significance, be used as management categories by all Local Government Authorities. The thematic framework will be vital in assigning such levels to individual places. Once available, places will be sorted into management categories, owners will be informed and asked to comment. At the end of a public consultation period Council will need to adopt the management categories and the proposed assignment of listed places to them.



### **2.2.6 Complete the heritage survey of areas not currently represented in the MI/Schedule**

The 2001 review of the MI outlined several areas, mostly in the northern parts of Claremont which were deemed worthy of adding to the MI. These recommendations have never been acted upon. The 2002 recommendations for the MI review also identified a need to ensure that all of the Town had been adequately surveyed. While this has importance, rationalising the existing listings and compiling an historic overview need to be completed before this project can be properly implemented. However, individual places or groups of places have been assessed and listed as the result of nominations received.

Additionally the 1991 BES identified a need to survey the mature vegetation within the town to identify areas or trees which had historic or natural heritage values. While the BES included some elements of this nature the focus of the survey was on the built environment not accompanying or natural vegetation. Again this project does not have a high priority but some new places have been added as the result of nominations.

### **2.2.7 Transfer list to the HCWA Heritage Inventory Software already purchased by the Town to provide a standard and easily updated database**

The list has not yet been transferred to the HCWA software program. This is not a priority and will be carried out progressively once the historic overview is completed.

## **3.0 MANAGING HERITAGE PLANNING**

This section of the management plan deals with issues resolving around balancing heritage preservation and development pressure. Heritage planning and management involves several issues from town planning scheme provisions, planning densities and R-Code applications to clear guidelines on what is acceptable adaptation or conservation of heritage places.

### **3.1. Review of Planning Provisions**

The need for policies, processes and provisions which work effectively to implement Council's heritage objectives has been identified for some time. Measures have been implemented progressively as problems arose and some key areas requiring attention identified. These are:

- 3.1.1 Review the TPS provisions which relate to heritage**
- 3.1.2 Review the Schedule of Historic and other Buildings and Places**
- 3.1.3 Formulate management categories**
- 3.2.4 Managing new development & character**
- 3.2.5 Establish heritage areas**
- 3.2.6 Establish conservation guidelines for heritage places**
- 3.2.7 Heritage agreements**
- 3.2.8 Establish heritage incentives**
- 3.2.9 Establish effective policies and internal procedures**
- 3.2.10 Identify heritage management projects for grant funding**
- 3.2.11 Review TOC plans and policies as required**





### **3.2 Actions and Timetable**

Figure 3 shows a graphic summary of the actions and timetables. Detailed lists of actions are included in Appendix 1.

#### **3.2.1 Review the TPS provisions which relate to heritage**

Both the 2000 Heritage Conservation Strategy and the 2002 review of heritage management techniques identified the necessity for change in the heritage provisions in TPS. New provisions have been drafted and Council initiated amendment proceedings at the Ordinary Council Meeting of the 19 April 2004.

Town of Claremont Heritage Management Plan - 2005



Figure 3 Managing Heritage Timetable of Actions

PROJECTS	Complete d	In Progress	1st half 2005/6	2nd half 2005/6	1st half 2006/7	2nd half 2006/7	2007/8	2008/9	2009/10
<b>MANAGING HERITAGE</b>									
<b>TPS Amendment</b>	Draft amendment ✓	OCM resolution	Community Consultation	OCM resolution, forward to W.A.P.C					
<b>Review Schedule</b>	Review as part of MI review	Review as part of MI review, Review historic sites	Review as part of MI review	Review as part of MI review	Review as part of MI review	Review as part of MI review	Review as part of MI review	Review as part of MI review	Review as part of MI review
<b>Management categories</b>						Draft levels of protection based on significance levels in MI	Workshop with Council and Community	Apply to listed places	Ongoing
<b>Managing new development &amp; character</b>	Input into draft design guidelines ✓	identify any policies/ procedures necessary to implement	Apply at streetscape level through planning section	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	initiate management through heritage areas or precincts
<b>Identify areas or precincts</b>							Define Areas, draft incentives	Workshop Council & Community	Establish local laws or scheme amendment
<b>Establish conservation guidelines</b>	Apply for grant for style study	Write budget proposal for TOC funding to create and publish brochures 2005/6	Finalize design and arrange publication of brochures	Review situation re conservation. Identify if separate conservation guidelines required	Budget for consultant to produce conservation guidelines if required	commission conservation guidelines if required	Adopt as TOC policy		
<b>Heritage Agreements</b>	Draft agreement for use with Clause 53 ✓	Use as necessary	Use as necessary	Use as necessary	Use as necessary	Use as necessary	Use as necessary	Use as necessary	Use as necessary
<b>Heritage incentives</b>	Review Incentives in TPS						Draft funded incentives	Workshop Council & Community	Workshop Council & Community
<b>Policies and internal procedures</b>	Review & implement progressively	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Write funding applications</b>	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Review TOC plans and policies , as required</b>	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing



### **3.2.2 Review the Schedule of Historic and Other Buildings and Places**

The Municipal Inventory and the Schedule of Historic and Other Buildings and Places were both created out of the 1991 BES. While such bulk creation of the lists has many advantages it does have the disadvantage that some places may be included in the schedule which do not require protection under the TPS. The schedule therefore requires reviewing to determine if this has happened.

Places on the schedule also require reviewing. This is being carried out in conjunction with the MI review and upgrade of assessments.

### **3.2.3 Management Categories**

The model scheme text allows for Council to construct levels of protection through the TPS by placing listed places in different management categories. This allows more rigorous protection for places of high significance while allowing a greater degree of change and development to places assessed as having lesser significance.

These levels of protection give a framework for heritage related development application decisions. Allowing both developers and Council to easily determine how important a place may be and to judge whether a proposed development falls within the guidelines for a place of that level of significance.

The Local Government Heritage Working Party suggest the HCWA management categories of Exceptional, Considerable, Some and Little significance should be used by all Local Government Authorities. They also suggest levels of protection that should be provided for places within each category. Such issues need to be discussed with Council and the community before being actioned.

### **3.2.4 Managing New Development & Character**

Three needs identified in the 2000 Heritage Conservation Strategy have been partly combined in a project to determine residential design guidelines. These needs were to look at acceptable density levels within Claremont, to determine precincts or heritage areas and to establish conservation guidelines.

Similarly the Town Centre Plan, while looking at wider planning issues also looks at heritage and amenity issues within the commercial heart of Claremont. The Heritage Officer has commented on both these documents and identified additional needs or issues to be addressed.

### **3.2.5 Establish Heritage Areas**

The Claremont Residential Design Guidelines (Hocking 2004) specifically looked at the architectural character of the residential areas of Claremont. It divided Claremont into several general precincts, within which special control areas were delineated around clusters of heritage building stock. The guidelines provide sound information on residential character and information on the location of heritage building stock. However, as delineated, the



special control areas are too numerous and small for effective management of character areas. The information in the Residential Design Guidelines needs to be combined with other areas of research to delineate a more limited number of heritage character areas which are both recognisable as such and of a sufficient size to allow effective streetscape character management. Defining heritage areas will be actioned once foundation documents such as the thematic framework have been completed. Guidelines on acceptable development and planning incentives within each area will then be drafted and workshopped before being adopted.

### **3.2.6 Establish style & conservation guidelines for heritage places**

Both members of the community and Council's planning officers have articulated a need for guidelines which identify the architectural styles of Claremont's historic building stock, identify the characteristic features of each style and identify acceptable change or adaptation.

The timetable outlined in Figure 3 is dependent on the current grant application being successful, if unsuccessful application will be made for Council budget funding. The timetable for actions is thus dependent on when funding is secured.

### **3.2.7 Heritage Agreements**

The TPS contains a provision for a heritage agreement to preserve and maintain a heritage place in return for bonus density provisions. The draft changes to the heritage provisions in TPS also contain a similar provision for heritage agreements. These agreements are legal documents between the Town and the owner of a heritage place. A pro-forma agreement has been drafted to act as a guideline for future agreements.

### **3.2.8 Establish Heritage Incentives**

The TPS contains some provision for heritage incentives such as the density bonus provision in Clause 53. These provisions are however, quite restricted in nature and do not apply to all heritage properties. A need for more flexibility was identified as part of the review of the heritage provisions in the scheme.

The proposed shift towards managing heritage areas would also be enhanced if a set of planning and rate incentives could be identified, which only applied within heritage character local control areas. Incentives such as a short-term reduction in rates on the completion of successful conservation/restoration project could also be considered. These incentives need to be carefully thought out to encourage the retention and enhancement of the identified character of these areas while providing owners with tangible benefits to balance against any development restrictions.

### **3.2.9 Establish effective policies and internal procedures**

A lack of written procedures and policies has been identified within the heritage section. Lack of written procedures covers procedures which are internal to the section and liaison procedures with other staff. There is also a lack of written policy to guide heritage management. This issue is being progressively completed.



### **3.2.10 Identify heritage management projects suitable for grant funding**

Grant funding is the major source of income for conservation and interpretation tasks. Conservation funding generally relates only to places which are heritage listed at the state or national level, interpretation funding can be more general. Town of Claremont owns three state listed properties which are eligible for grant funding. Between 2000 and 2003 \$4,000 in grant funding was sought and received. Between 2003 and 2005 \$26,080 in grant monies was received and further grants totalling \$61,046 are being sought.

### **3.2.11 Review TOC plans and policies as required**

Plans and policies created by other sections can have a severe impact on the heritage of places. Part of the Heritage Officer's tasks is to liaise with other staff, provide heritage information and to give a heritage impact assessment of plans and policies which affect heritage places and suggest modifications or mitigation procedures.

## **4.0 ADMINISTRATION AND MANAGING HERITAGE RECORDS**

### **4.1. Aims**

Administration and managing heritage records are an ongoing part of the Heritage Officer position which is task based. Deficiencies within this area have been identified by the 2002 consultants report on the MI.

Record keeping for the MI and Schedule was previously confined to the BES map which was updated as needed and to the files of individual assessments which were lodged at the Museum and at the Council Offices. The map functioned as the public copy of the Schedule however there was uncertainty at staff level as to whether the 'potentially significant' and 'modern significant' places shown on the map were included in the Schedule. Council administration has sought legal advice on this matter. That advice is that the wording of the two resolutions which created the MI and later the Schedule placed all the places identified in the BES on the MI and the Schedule.

Figure 4 shows the tasks graphically with timetable information where this is required.

### **4.2. Council**

All heritage decisions are ultimately taken by Council.

The Heritage Officer writes reports to Council on a range of matters including:

- Requests for remove from listing;
- Nominations to add to the list;
- Officer recommendations to change the heritage status of a listed place;
- Strategies, policies and other heritage related projects; and
- Civic Design Award nominations.



The Officer may also prepare and run workshops for Councillors on heritage matters and prepare heritage based presentation ceremonies. The Officer also researches and provides heritage advice to Council.



Figure 4 Administration & Records Management – Tasks & Timetable of Actions

PROJECTS		2005/2006	2005/2006	2nd half 2005/6	1st half 2006/7	2nd half 2006/7	2007/8	2008/9	2009/10
<b>ADMINISTRATIO N AND RECORDS MANAGEMENT</b>									
<b>OCM Reports</b>	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly
<b>Manage heritage records of listed places</b>	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Manage de-listing process</b>	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Manage public correspondence</b>	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Heritage Business Plan</b>	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Heritage Budget</b>	Yearly		Yearly		Yearly		Yearly	Yearly	Yearly
<b>Strategic Projects Calendar</b>	Yearly		Yearly		Yearly		Yearly	Yearly	Yearly
<b>Principal Activities Plan</b>	As required	As required	As required	As required	As required	As required	As required	As required	As required
<b>Put listing on rate notices</b>		Initiate software changes through corporate services	Add heritage information to rates database		Update		Update	Update	Update
<b>Establish a Schedule of fees for de-listing requests</b>			As part of budget process						



### 4.3. Administration

The Heritage Officers main administrative task is to manage heritage records. There are several types of heritage records:

- There are four different digital spreadsheets of listed places which require updating after Council's decisions which affect listed places. The Municipal Inventory and the Schedule of Historic and Other Buildings and Places then need to be printed out and earlier copies replaced. The IT Officer is requested to replace the list included on Council's web page.
- The CAD map of listed maps also needs to be corrected and given to the Engineering Technical Officer for updating. The updated map is then distributed.
- Updated heritage assessments are added to the BES Register of Places, the Museum BES reference collection and to the property files.
- The Heritage Officer writes, registers and files all heritage related correspondence.

The Heritage Officer also manages requests for removal from heritage listing and updating heritage assessments. This includes correspondence with owners, searching the plan room files, historic Post Office Directory information and historic town maps for documentary evidence and writing the historical background and historical, social and scientific significant assessment sections of the updated heritage assessments. The officer also commissions the architectural consultant and requests rate book information from the Claremont Museum.

As a unit manager the Heritage Officer writes and carries out a Business Plan for the unit and attends Senior Officer meetings to report on the process of the business plan. The Heritage Officer also identifies the budget needs of the unit and puts forth arguments to support those needs. Budget defence can be quite time consuming but is confined to one part of the year. The Heritage Officer manages the heritage budget, commissions work and creates purchase orders which are within their authorised purchasing limit. The Heritage Officer also adds heritage projects to the Strategic Projects Calendar and prepares the heritage segment of Principal Activities Plan.

An administrative task included in Councils Heritage Conservation Strategy 2000, which has not been actioned to date is providing advice on rate notices. Corporate software needs to be modified before this action can take place therefore the information was unable to be added to the 2004 rate notices. The required modifications have been added to the requested capabilities of the MERIDIO document management system.

The issue of the cost to Council of considering requests for removal from heritage listing is also largely an administrative matter. At the current time requesting removal from heritage listing does not incur a fee. However, the process does incur cost to Council in officer time and consultant fees. It is proposed to introduce an application fee for requests for removal from heritage listing in the 2005/2006 budget process.





## 5.0 PROMOTION, PUBLICATIONS AND INCENTIVES

The overall aim of promotion, publications and incentives is to inform owners and the public about the heritage of Claremont and to make heritage owners comfortable with listing by providing benefits as well as restrictions.

The need for heritage management to be proactive in both offering solutions to some of the practical problems heritage preservation poses to heritage owners and providing wider social and cultural benefits to the community was recognised by Council in 2000 when they adopted Council's Heritage Conservation Strategy. This section of the management plan identifies those adopted strategies which can be immediately implemented and those which can be subsequently considered in future budgets

Planning initiatives and some lower cost promotional initiatives from the Heritage Conservation Strategy 2000 have been actioned and where relevant continue to be actioned as part of normal heritage officer duties (Figure 5). Initiatives adopted by Council resolution 82/00, relating to promotions, publications and incentives rather than planning which remain unfunded and therefore not actioned are:

### Incentives

Establish a program of acquiring threatened places that are appropriate to undertake conservation and resell.

### Promotions and Publications

- vi) Promote the involvement of local service organisations in assisting pensioners in the maintenance of places listed in the Municipal Inventory.
  - vii) Provide advice on rate notices of Municipal inventory listing.
  - viii) Establish a directory of tradespeople specialising in conservation work, possibly in conjunction with other Western Suburbs councils.
  - ix) Sponsor architectural students to undertake research on places listed in the Municipal Inventory, in liaison with relevant tertiary institutions.
  - xi) Establish a guest speaker program focussing on appropriately qualified and experienced guest speakers.
  - xii) Provide plaques for placing at the front of appropriately restored and maintained heritage places.
  - xiii) Use of bollards in streets to indicate a heritage precinct and remove all street signs and place essential signage on bollards.
- 9 ii) Establish a local heritage assistance fund to provide small grants to encourage local heritage.

Not actioning these adopted initiatives has lead to a situation where the heritage values of Claremont are not well understood or appreciated and heritage listing is seen as a negative. To preserve character and amenity in Claremont against the development pressures the Town now faces it is important to counter-balance this negative with positive heritage measures to increase the community's sense of 'ownership' of heritage within the town and provide a benefits packet for owners.



Figure 5 Promotion, Publications and Incentives – Actioned initiatives

PROJECTS	Completed	2005	2nd half 2005/6	1st half 2006/7	2nd half 2006/7	2007/8	2008/9	2009/10
<b>Promotion, Publications and Incentives</b>								
<b>Regular Heritage Articles in Town Talk</b>	✓	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
<b>Include history of listed places in Street Histories</b>	✓	As required	As required	As required	As required	As required	As required	As required
<b>HCWA directory of consultants made available at front counter</b>	✓							
<b>Place available flyers on conservation and renovation in Library</b>	✓							
<b>Give talks on Heritage matters</b>	As required	As required	As required	As required	As required	As required	As required	As required
<b>Sponsor Civic Design Awards</b>	Ongoing	As required Re-format to Bi Annual, mark TOC foundation		Awards 15 June 2006	Mark TOC Foundation Day 2007	Awards 15 June 2008	Mark TOC Foundation Day 2009	Awards 15 June 2010



As part of this management plan un-actioned initiatives from the Heritage Conservation Strategy 2000 have been updated and a small number of new initiatives added. Importantly viable methods of funding have been delineated. To this purpose un-actioned initiatives are divided into two packages (Figures 6 & 7).

The first package should be deliverable through normal Council budget processes or grant funding. Figure 7 contains initiatives which require a larger source of available funding. It is envisioned that this larger source of funding could be in the form of a Tax Deductible Scheme for heritage within Claremont. Investigation of the implications and costs of such a scheme is scheduled for 2006/2007. Actioning initiatives contained in Figure 7 will be considered after Council has deliberated each item and determined funding methods as part of future budget processes.

### **5.1. Actioned Initiatives**

These initiatives have little associated costs and are absorbed as part of normal operating expenditure for the heritage budget. One initiative has been updated from that adopted in 2000 and is explained below.

#### **5.1.1 Give talks to schools and local groups on heritage matters**

This initiative is a low cost variation on the initiative of establishing a guest speaker program. Talking to schools and local interest groups on heritage matters which impinge on their areas of interest is an effective method of engaging the public in heritage. Associated costs are mainly time related therefore this method of communication is intended to be phased in after the major projects associated with the review of the listings and management have been completed.

### **5.2. Initiatives which can be actioned through Council budget processes**

These initiatives have costs associated with them and would require a budget for the heritage section of \$5000 in the Activities/Events line item. New initiatives and initiatives which have been updated from that adopted in 2000 are expanded on below.

#### **5.2.1 Establish a program of small events or projects in conjunction with Claremont Museum**

It would be of great benefit to the positive presentation of heritage within the Town for the Heritage and Museum sections to work together on small interpretation projects which were within the budget constraints of the sections and to identify and apply for grant funding for larger projects. It is envisioned that the fund could also be used for occasional and once off heritage related tasks or projects undertaken by other Town administrative sections which did not easily fit into the budget line items of that section.



Figure 6 Promotion, Publications and Incentives – Initiatives which can be actioned through grant or budget processes

Promotion, Publications and Incentives	Completed	2005	1st half 2005/6	2nd half 2005/6	1st half 2006/7	2nd half 2006/7	2007/8	2008/9	2009/10
<b>Funding</b>			Establish budget line item						
<b>Directory of tradespeople for conservation work</b>		Stage 1 Research LGA & Trade interest in directory and Maintenance Week	Stage 2 If sufficient interest Take to Council for consideration.	Stage 3 Compile directory	Publish directory		Maintenance Week	Maintenance Week	Maintenance Week
<b>Promote local service organisations assisting maintenance heritage places</b>		Stage 1 Investigate level of interest in service organisations	Stage 2 If interest Establish a referral system						
<b>Program of small events/projects</b>	NAW 2004 ✓		Help Centenary fund raiser for Signal Cabin	As identified	As identified	As identified	As identified	As identified	As identified
<b>Sponsor students research on listed places</b>				Research implementation Take to Council for consideration.	If adopted Establish sponsorship program	Sponsorship ongoing	Sponsorship ongoing	Sponsorship ongoing	Sponsorship ongoing
<b>Establish a guest speaker program heritage and conservation</b>				Research costs and speakers Take to Council for consideration.	If adopted Establish speaker program	Ongoing	Ongoing	Ongoing	Ongoing
<b>Extend the network of heritage trails</b>			Apply for grants		Apply for grants		Apply for grants	Apply for grants	Apply grants
<b>Establish a 'Friends' group of volunteers to carry out small projects under supervision</b>						Research interest, and suitable format	Take to Council for consideration. If adopted Establish	Undertake small projects as identified	Undertake small projects as identified
<b>Create a renovators note book</b>			Create as Word doc. Copies in Library, Museum						



### **5.2.2 Extend the network of heritage trails**

Heritage Trails are a useful way for drawing attention to, and providing information on aspects of heritage. The usefulness of trails as a heritage interpretation tool is demonstrated by the fact that grants are available to resource and implement trails. Such grants will be sourced to set up a network of trails within Claremont.

### **5.2.4 Establish a ‘Friends’ group of volunteers to carry out small projects under supervision**

The ‘Friends’ group is envisioned to be both a practical ‘hands on’ group and a research group. On a practical level it is envisioned the group will help enhance maintenance and conservation projects on the Town’s state heritage listed places such as Anzac Cottage. Also the group could carry out, with the owners permission, heritage rescue projects on properties about to be demolished, extended or altered.

Aspects of heritage rescue work could be completing a renovator’s diary of changes to the home or garden or in some instances carrying out an archaeological salvage project under professional supervision. Work on the Town’s state listed places could include some gardening or simple repair work on Anzac Cottage as well as recording changes and archaeological salvage to buildings owned by the Town.

On a research level the group could carry out historical research at Batty Library and State Archives on aspects of Claremont’s heritage which could be used for a variety of heritage enhancement projects such as heritage trails.

### **5.2.5 Create a diary for renovators**

Because of the established nature of Claremont’s built environment there is a very high percentage of renovation and extension within the Town. Much of this affects heritage building stock with heritage features constantly being removed as part of updates or renovated to reveal their beauty. Most of these changes are not recorded in any way except for the architectural plans required as part of gaining planning permission.

Many renovators are proud of the work they have carried out to bring a home back to character or to adapt an old home for modern living. A renovator’s diary will allow renovators an avenue to record the changes they have made for their own purposes while a copy of the diary will provide the Town with a more visual and detailed record of changes than architectural plans.

## **5.3. Initiatives that can be considered in future budgets**

These initiatives have much higher costs associated with them and would require a funding source outside of the heritage budget. It is envisioned this funding source could be in the form of a tax deductible revolving fund scheme similar to that put in place by the City of Perth for heritage or by WALGA for low interest loans for heritage owners.



Figure 7 Promotion, Publications and Incentives – High cost initiatives

Promotion, Publications and Incentives	2005/2006	1st half 2006/7	2nd half 2006/7	2007/8	2008/9	2009/10
<i>Funding</i>			Investigate setting up Tax deductible scheme	Prepare budget item for Council consideration	If adopted establish Tax deductible scheme	
<b>Street furniture for heritage precincts</b>						For consideration in future budgets
<b>plaque listed places of high significance or quality renovation</b>	Research suitable places	Apply for interpretation of cultural heritage grants		Apply for interpretation of cultural heritage grants	Apply for interpretation of cultural heritage grants	Apply for interpretation of cultural heritage grants
<b>Establish a local heritage assistance fund to provide small grants</b>					Should funds become available: Establish management and distribution protocols	Put to Council for consideration
<b>Program of acquiring threatened places for conservation and resell</b>						Should funds become available: Establish management protocols for Council consideration
<b>Program of practical workshops on renovation and conservation</b>						Research costs
<b>Establish program of heritage based events and enactments</b>						Research



The basis for the tax deductible schemes is that donators received a 100% tax deduction for any monies donated or full market value for properties donated. The deductions can also be spread across more than one tax year. The scheme is linked to the National Trust and its position with regards to taxation. The National Trust Bush Bank is an example of this type of scheme, which has been running for some time. The Heritage Council has a downloadable information paper on revolving funds and how they work for heritage places.

A heritage fund could also be set up from other sources such as one-off profits from re-developing Town owned land. Money from such a source could also be put into the tax deductible scheme. Investigating the effectiveness of such a scheme and the cost involved in setting one up is timed for 2006/2007. It is envisioned that many of the high cost items from the Heritage Conservation Strategy 2000 could be funded out of a Claremont Heritage Tax Deductible Scheme. New initiatives and initiatives which have been updated from those adopted in 2000 are expanded on below.

### **5.3.1 Street furniture and streetscape treatments in public places for heritage precincts or areas**

Special street furniture and streetscape treatments can be used to enhance the amenity of heritage areas. Such improvements need to be in character with the dominant architectural character of the built environment of the area. It is envisioned that such improvements could be funded out of the Claremont Heritage tax-deductible scheme or the Renew Claremont budgeting.

### **5.3.2 Establish a program of heritage based events and enactments**

Heritage events and period history enactments have been used successfully in rural areas to revitalise the local economy and promote a high level of community cohesion and identity (P. Kenyon, lecturer). A natural focus for such a program, if funding became available, which would bring both economic and social benefits to the Town would be the commercial axis of the Claremont Railway Station and Bay View Terrace. A focus providing mainly social benefits would be Claremont Museum and Mrs Herbert's Park.

## **6.0 CONCLUSION**

This HMP outlines the current situation of heritage management within Claremont and sets out what is needed to achieve change smoothly and to ensure effective management in the future. A timetable of actions to 2010 has been articulated to attain this.

The ultimate aim of heritage management within Claremont was identified as having a well managed and accepted heritage list. Several internal problems with heritage management and record keeping were identified which need solving to provide a well managed list. It was also identified that to promote satisfaction with heritage listing in an area of high land values and pressure for development heritage management needs to be able to deliver real and perceived benefits to owners.



The need for major upgrading in the management of the MI, Schedule and the BES is highlighted. Upgrading is needed in selection criteria, assessment documentation and public communication.

Major change in heritage planning was also identified as necessary. These changes include upgrading the heritage provisions in the TPS, assigning management categories to listed places, identifying heritage areas and providing a more holistic viewpoint and the necessary management tools for managing development within them.

Maintaining and enhancing heritage areas was identified as the most effective way to promote a situation where owners of heritage places receive an economic benefit in the form of higher appreciation rates for their properties. A series of initiatives adopted by Council in 2000 designed to provide economic and social benefits to owners and the community also require actioning and methods of funding this are put forward.

Together the changes in this HMP are designed to assist Council in fulfilling their mission statement to:

*“Develop a vibrant, harmonious and safe village.  
Embracing the future, respecting the past”.*





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## **8.0 APPENDIX 1**

### **MANAGING THE MUNICIPAL INVENTORY**

#### **Actions**

#### **Managing the Municipal Inventory**

##### **2.2.1 An accurate list of places included should be agreed and the owners notified.**

2.2.1.1 Action 1: An accurate list of places. Completed.

2.2.1.2 Action 2: Put excel list on web page. Completed.

2.2.1.3 Action 3: Notify owners of current listing status and what that means. Completed

2.2.1.4 Action 5: Provide heritage information at front counter and library. Completed.

2.2.1.5 Action 6: Send heritage information to real estate agents and property evaluators operating in the Claremont area. Completed.

2.2.1.6 Action 7: Refine Owner Notification Procedures for listed places. Completed.

2.2.1.7 Action 8: Formulate notification procedures for places nominated for listing. Completed.

##### **2.2.2 Assessments of all places should be upgraded to include a photograph**

2.2.2.1 Action 1: A photographic survey of all places on the list. Completed.

2.2.2.2 Action 2: Add photographs to assessments. Aug 2005.

##### **2.2.3 Formulate assessment criteria**

2.2.3.1 Action 1: Assessment criteria for determining architectural and streetscape significance to be clarified, refined and aligned with Council's overall aim for heritage. Completed.

2.2.3.2 Action 2: Heritage assessments to include statements of physical condition and list of heritage fabric. Completed.

2.2.3.3 Action 3: Historical, scientific and social assessment criteria to be formulated using professional expertise. 2005.

2.2.3.4 Action 4: Carry out the public consultation phase of the Values Program to input into social assessment criteria. July 2005.

2.2.3.5 Action 5: Social assessment criteria to be formulated using results of community values project and professional expertise. Dec 2005.

2.2.3.6 Action 6: Establish review criteria. Draft Completed.



- 2.2.3.6.1 That 'National Trust Classified' is removed as a management category but continues to be noted in the heritage database and accompanying map;
  - 2.2.3.6.2 That 'Historic Site' is removed as a management category and all places listed within it be moved into the 'Significant Place' category but historic sites and trees should continue to be noted as such in the heritage database and accompanying map;
  - 2.2.3.6.3 That the 'Modern Significant Place' category is substantially revised with all post 1965 building stock currently listed in this category identified and removed from all heritage listings;
  - 2.2.3.6.4 That older building stock currently listed in the 'Modern Significant Place' category is assessed to determine if the place should be listed as a 'Significant Place' or removed from all heritage listings;
  - 2.2.3.6.5 That 'Modern Significant Place' is removed as a management category once 2.3 and 2.4 have been completed;
  - 2.2.3.6.6 That administration should continue the review of the 'Potentially Significant and Significant Place' categories using the Heritage Council of WA criteria set at a local level of significance;
  - 2.2.3.6.7 That 'Potentially Significant Place' is removed as a management category once 2.6 is completed;
  - 2.2.3.6.8 That administration should progressively up date and review the 'Significant Place' category using the above criteria;
  - 2.2.3.6.9 That the notification of owners is up dated as part of the review.
- 2.2.3.7 Action 7: Removal of 'National Trust' as management category. Completed.
- 2.2.3.8 Action 8: Alter database and map legend to reflect that these are significant places. Completed.
- 2.2.3.9 Action 9: Up date assessments for historic sites to include historical and archaeological significance. Heritage Officer on a progressive basis. 2004-2006.
- 2.2.3.10 Action 10: Inform Technical Services and Museum staff about the probability of archaeological material in these areas so that management of any disturbance can be co-orientated. Completed.
- 2.2.3.11 Action 11: Removal of 'Historic Site' as management category. Completed.
- 2.2.3.12 Action 12: Alter database and map legend to reflect that these are significant places. Completed.
- 2.2.3.13 Action 13: Search Council plan and property files for information regarding the construction dates of 'Modern Significant' properties. Information on construction requested from owners. Completed.
- 2.2.3.14 Action 14: Delist 'Modern Significant Places' built after 1965 except for defined exceptions. Completed.
- 2.2.3.15 Action 15: Update heritage assessments of remaining properties. Completed.
- 2.2.3.16 Action 16: Updated assessments to go to Council for decision. Completed.
- 2.2.3.17 Action 17: Removal of 'Modern Significant Place' as management category. On production of archival records for final places to be removed from listing.



2.2.3.18 Action 18: Updated heritage assessments of 'Potentially Significant' properties 2004– 2007.

2.2.3.19 Action 19: Updated assessments to go to Council for decision. 2004-2007.

2.2.3.20 Action 20: Removal of 'Potentially Significant Place' as management category. 2008.

2.2.3.21 Action 21: Progressively up date assessments and review the 'Significant Place' category to provide a common standard of assessment across all categories. Ongoing.

2.2.3.22 Action 22: Formulate review guidelines into table format for clarity of use. Draft completed.

#### **2.2.4 Development of a thematic historic framework for the Town to ensure the MI/Schedule is representative of all periods of development**

2.2.4.1 Action 1: Compile historical information: Completed.

2.2.4.2 Action 2: Write Draft Thematic History. August 2004- June 2005.

2.2.4.3 Action 3: Council to adopt thematic History 2005.

#### **2.2.5 Assign management categories to places**

2.2.5.1 Action 1: Determine workable categories for the MI. June 2005.

2.2.5.2 Action 2: Notify owners of proposed categories and invite their comment. September 2005.

2.2.5.3 Action 3: Adopt categories as policy through OCM. December 2005.

2.2.5.4 Action 3: Use Heritage Assessments, Thematic Framework, Residential Design Guidelines and Town Centre Design Guidelines to assign management categories to individual places. 2006-7.

#### **2.2.6 Complete the heritage survey of areas not currently represented in the MI/Schedule**

2.2.6.1 Action 1: Engage Architectural Consultant. As needed.

2.2.6.2 Action 2: Updated assessments to go to Council for resolutions to add places 2006-10.

2.2.6.3 Action 3: Engage Landscape/Horticultural Consultant. As needed.

2.2.6.4 Action 4: Updated assessments to go to Council for resolutions to add places 2007-11.

#### **2.2.7 Transfer list to the HCWA Heritage Inventory Software already purchased by TOC to provide a standard and easily updated database**

2.2.7.1 Action 1: Add information on listed places to HCWA software program. 2006.

2.2.7.2 Action 2: Create a CD-ROM version of Heritage Database listing and make copies available through the Library. 2007.

2.2.7.3 Action 3: Update database progressively as new information is gathered.

2.2.7.4 Action 4: Update CD-ROM periodically and replace library copies.



## MANAGING HERITAGE PLANNING

### Actions

3.2.1 Review the TPS provisions which relate to heritage

3.2.1.1 Action 1: Commission solicitors to draw up draft changes. Completed.

3.2.1.2 Action 2: Workshop with HAC. Completed.

3.2.1.3 Action 3: Commission solicitors to comment on revised draft and re-draft as necessary. Completed.

3.2.1.4 Action 4: Workshop changes with councillors. Completed

3.2.1.5 Action 5: Take final draft to OCM for decision to proceed as per Local Government regulations. Completed.

### 3.2.2 Review the Schedule of Historic and Other Buildings and Places

3.2.2.1 Action 1: Review scheduled places to determine which have no physical fabric or elements to protect through Town Planning Regulations. 2004/5.

3.2.2.2 Action 2: Review places on the schedule progressively in tandem with the MI review. To be carried out progressively.

### 3.2.3 Management Categories

3.2.3.1 Action 1: Write policy for levels of protection for Scheduled Place. March 2007.

3.2.3.2 Action 2: Workshop with Council and Community. August 2007.

3.2.3.3 Action 3: Apply to listed places. Ongoing.

### 3.2.4 Managing New Development & Character

3.2.4.1 Action 1. The Heritage Officer to comment on draft Residential Design Guidelines. Completed.

3.2.4.2 Action 2: The Heritage Officer to comment on draft Town Centre Plan. Completed.

3.2.4.3 Action 3: Identify any policies or procedures necessary to implement. 2005.

3.2.4.4 Action 4: The design guidelines to be applied through planning section. Ongoing.

3.2.4.5 Action 5: Initiate area management once heritage areas have been defined. 2010.

### 3.2.5 Establish Heritage Areas



3.2.5.1 Action 1: Use residential guideline studies, thematic historic framework and updated heritage information to define heritage areas and establish what their architectural and streetscape character is. December 2007.

3.2.5.2 Action 2: Draft planning and R-Code based incentives for owners in heritage areas. April 2008.

3.2.5.3 Action 3. Use residential guidelines to define acceptable development and design for new housing and adaptations to older building stock within each heritage area. December 2008.

3.2.5.4 Action 4: Workshop draft areas, incentives & guidelines with Councillors. 2009.

3.2.5.5 Action 5: Workshop draft areas, incentives & guidelines with owners. 2009.

3.2.5.6 Action 6: Add heritage areas to listings following process established by Heritage Management Plan and Town Planning Act. 2010.

3.2.5.7 Action 7: Develop guidelines into appropriate management policies or local laws for heritage areas. 2010.

### **3.2.6 Establish style & conservation guidelines for heritage places**

3.2.6.1 Action 1: Apply for a grant for a study to identify Claremont heritage housing types and produce draft style guidelines for each housing type. Completed.

3.2.6.2 Action 2: If grant application successful commission a consultant. 2004. If not write budget proposal for TOC funding for style guidelines 2005/2006 budget.

3.2.6.3 Action 3: Review draft guidelines. 2005.

3.2.6.4 Action 4: Finalise design, arrange publication and distribute guidelines. Make available at front counter and Claremont Library. 2005/2006.

3.2.6.5 Action 5: Identify and formulation policies or procedures necessary to apply style guidelines as planning tool. 2006.

3.2.6.6 Action 6: Review planning effectiveness of style guidelines as character conservation tool. Determine if separate conservation guidelines are required. 2006.

3.2.6.7 Action 7: Fund and commission conservation guidelines if required. 2006/2007.

3.2.6.8 Action 8: Adopt guidelines as Council policy. 2006/2007.

### **3.2.7 Heritage Agreements**

3.2.7.1. Action 1: Draft a Heritage Agreement pro forma which can be used when the bonus density provision of clause 53 has been enacted. Completed.

3.2.7.2. Action 2: Commission solicitors to comment on the pro forma agreement and re-draft as necessary. Completed.

3.2.7.3 Action 3: Commission solicitors to use pro forma as basis for individual agreements. As required.



### **3.2.8 Establish Heritage Incentives**

3.2.8.1. Action 1: Review incentives in Town Planning Scheme. Completed.

3.2.8.2 Action 2: Draft a set of funded planning and rate incentives for use with TPS. 2007/8

3.2.8.3 Action 3: Workshop with councillors and community. 2008/2009

### **3.2.9 Establish effective policies and internal procedures**

3.2.9.1 Action 1: Write procedures for heritage input into D/A and Demolition processes. Completed

3.2.9.2 Action 2: Write procedures for maintenance and conservation of TOC places on Register of Heritage Places. Completed

3.2.9.3 Action 3: Create a Heritage Officer's Handbook which gives written instructions on how to carry out Heritage Officer tasks. In progress

3.2.9.4 Action 4: Write policy for production of archival records. Completed

3.2.9.5 Action 5: Identify key areas for policy formulation and write appropriate policies. Progressively

3.2.9.6 Action 6: Review TOC plans and policies as required for impact on heritage and character. Ongoing

### **3.2.10 Identify heritage management projects suitable for grant funding**

3.2.10.1 Action 1 Identify projects and apply for grants. Ongoing.

3.2.11 Review TOC plans and policies as required.

Ongoing

## **ADMINISTRATION AND MANAGING HERITAGE RECORDS**

### **Actions**

#### **4.2. Council**

Task – Write officer reports for OCM. As required.

Task – Carry out research for councillors. As required.

Task – Prepare and run workshops for Councillors. As required.

Task – Prepare heritage based presentation ceremonies. As required.

#### **4.3. Administration**

Task – Manage heritage records of listed places. Ongoing.



Task – Manage de-listing process. Ongoing.

Task – Manage public correspondence. Ongoing.

Task – Prepare and carry out Heritage Business Plan. Ongoing.

Task – Prepare budget arguments and manage heritage budget. Ongoing.

Task – Prepare heritage tasks on Strategic Projects Calendar. Yearly.

Task – Prepare heritage segment of Principal Activities Plan. As required.

### **4.3.1 Provide advice on rate notices of heritage listing**

4.3.1.1 Action 1: Inform IT support of the need to modify software to allow the action. Completed.

4.3.1.2 Action 2: Add the heritage information to the rates database. 2005/2006.

4.3.1.3 Action 3: Update heritage information on rates database. Yearly.

### **4.3.2 Provide a schedule of fees for applications to remove heritage places from listing.**

4.3.2.1 Action 1: Draft a schedule of fees for consideration in the 2005/2006 budget process. April/May 2005.

4.3.2.2 Action 2: Implement as required once schedule has been approved by Council. Ongoing.

## **CUSTOMER SERVICE**

### **Actions**

#### **5.1. Low Cost Initiatives**

##### **5.1.1 Write regular heritage articles for Town Talk**

5.1.1.1 Action 1: Offer an article for publication for at least every second issue of Town Talk. Ongoing

##### **5.1.2 Include the history of listed houses when compiling a street history**

5.1.2.1 Action 1: Liaise with Museum Staff when street histories are being compiled. Make sure the consultant knows which houses in the street are listed and the requirement to include their history. As Required.

##### **5.1.3 Make HCWA directory of consultants available.**

5.1.3.1 Action 1: Download from Internet and print. Place copy at front counter. Completed.

##### **5.1.4 Publicise the availability of resource material on heritage conservation through the Claremont Library.**

5.1.4.1 Action 1: Source available flyers and place in library. Completed.





### **5.1.5 Give talks to schools and local groups on heritage matters**

5.1.5.1 Action 1: Advertise availability of Heritage Officer in Town Talk articles. Occasionally.

5.1.5.2 Action 2: Give talks. On request.

### **5.1.6 Create a diary for renovators**

5.1.6.1 Action 1: Create a Word document which renovators can use to record changes they have made to their homes. May 2006.

5.1.6.2 Action 2: Advertise the existence of the diary in Town Talk. June 2006.

5.1.6.3 Action 3: Place copies in Library and Museum. May 2006.

## **5.2. Medium Cost Initiatives**

### **5.2.1 Investigate establishing a directory of tradespeople specialising in conservation work**

5.2.1.1 Action 1: Research Trade & WESTROC interest in directory and Maintenance Week. July-September 2005.

5.2.1.2 Action 2: Compile the directory and commission artwork for front cover. Directory for Claremont or for WESTROC LGA's. Feb-June 2006.

5.2.1.3 Action 3: Publish hard copy of directory and place in libraries of participating LGA's. Also put on Claremont web page. July-August 2006.

5.2.1.4 Action 4: Establish Protocols for maintenance week. September 2006.

5.2.1.5 Action 5: Committee/Administration to determine where to focus tradespeople. October 2006.

5.2.1.6 Action 6: Write article for Town Talk re timing of the week. October 2006.

5.2.1.7 Action 7: Maintenance Week – liaise with tradespeople and send out press release November 2006.

Actions 5 to 7 repeated yearly.

Directory information updated yearly

### **5.2.2 Promote the involvement of local service organisations in assisting pensioners or those on low or limited incomes in the maintenance of places listed in the MI.**

5.2.2.1 Action 1: Investigate level of interest in local service organisations such as the Lions Club, Rotary etc. September 2005.

5.2.2.1 Action 2: Investigate the level of help available to veterans for maintenance of their homes through Veterans Affairs. September 2005.

5.2.2.1 Action 3: Establish a referral system to contact those in need with a Local Service Organisation or Veterans Affairs as appropriate. March 2006.



### **5.3. High Cost Initiatives**

#### **5.2.3 Sponsor awards for heritage conservation in the Town of Claremont.**

5.2.3.1 Action 1: Establish bi-annual format for Civic Design Awards. Awards presentation to be held on TOC Foundation Day. Completed.

5.2.3.2 Action 2: Establish a more effective format for sourcing nominations and judging the awards. Completed.

5.2.3.3 Establish incentives linked to the award. 2005/2006 budget process.

5.2.3.4 Action 2: Establish a tradition of small events to mark TOC Foundation Day Bi-Annually. June 2007.

#### **5.2.4 Establish a program of small events or projects in conjunction with Claremont Museum**

5.2.4.1 Action 1: Liaise with Museum to identify appropriate small events or projects. Ongoing.

5.2.4.2 Action 2: Liaise with volunteers or others involved. As required.

5.2.4.3 Action 3: With Museum assign tasks and costs involved to set up the event or project. As required.

5.2.4.4 Action 4: Help run event or project. As required.

#### **5.2.5 Sponsor student research on listed places**

5.2.5.1 Action 1: Liaise with tertiary institutions to establish courses where students would benefit from undertaking projects within the Town part of their studies. October 2006.

5.2.5.2 Action 2: Establish a program of course projects with relevant lecturers. February 2007.

5.2.5.3 Action 3: Establish procedures with the institutions for students to apply for paid and unpaid work experience. February 2007.

5.2.5.4 Action 4: Ongoing liaison with relevant lecturers to identify and prioritise projects. Ongoing.

#### **5.2.6 Establish a guest speaker program focussing on appropriately qualified and experienced guest speakers**

5.2.6.1 Action 1: Research availability and cost of resources required. October 2006.

5.2.6.2 Action 2: Research availability and cost of suitable speakers. November 2006.

5.2.6.3 Action 3: Establish a speaker program for the budget year. Yearly.

#### **5.2.7 Extend the network of heritage trails**

5.2.7.1 Action 1: Research suitable trail subjects. July 2005.



5.2.7.2 Action 2: Apply for cultural heritage interpretation grants. Ongoing.

**5.2.8 Establish a 'Friends' group of volunteers to carry out small projects under supervision**

5.2.8.1 Action 1: Research community interests, associated costs and suitable format for group. May 2007.

5.2.8.2 Action 2: Establish 'Friends' group. August 2007.

5.2.8.3 Action 3: Identify and undertake small projects. Ongoing.

**5.3.1 Street furniture and streetscape treatments in public places for heritage precincts or areas**

5.3.1.1 Action 1: Prioritise areas for improvements 2009/10.

5.3.1.2 Action 2: With Technical Services determine a list of improvements for each area. 2010.

**5.3.2 Plaque for listed places of high significance or high quality conservation/renovation**

5.3.2.1 Action 1: Research suitable places. Ongoing from 2005.

5.3.2.2 Action 2: Apply for interpretation of cultural heritage grants. Yearly from 2005.

**5.3.3 Establish a local heritage assistance fund to provide small grants**

5.3.3.1 Action 1: Establish management and distribution protocols. 2009.

5.3.3.1 Action 2: Organise and publicise grant round. 2009 onwards.

**5.3.4 Establish a program of acquiring threatened places that are appropriate to undertake conservation and resell**

5.3.4.1 Action 1: Establish management protocols. 2010.

**5.3.5 Establish an education program of practical workshops on renovation and conservation**

5.3.5.1 Action 1: Research viable content, resource needs and costs for workshops. 2010.

**5.3.6 Establish a program of heritage based events and enactments**

5.3.6.1 Action 1: Research viable content, resource needs and costs. 2010.