

Heritage information series

## **How to establish a heritage advisor service**



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## Introduction

The primary objectives of the heritage advisor are to:

- work with council to develop and deliver a heritage policy and heritage strategy
- provide professional advice to assist council and the community to deliver good heritage and urban design management in your local government area.

Heritage advisors provide regular and ongoing expertise to councils, communities and owners of heritage properties and assist in promoting urban design and heritage in the area.

The outcomes of this program have been very positive. Many successful and ongoing partnerships between local and state governments and communities have been developed. Most local councils across NSW have access to a part-time heritage advisor or employ a full-time heritage officer.

# The framework

## What is a heritage advisor service?

Heritage advisors are appointed by, and report, to local councils. They are mostly appointed on a part-time basis. In rural areas most advisors visit on a one-day-a-month basis; in urban areas more frequent visits are common. At the start of a heritage advisor program and during times of heavy workload, extra time may be needed to ensure the program operates smoothly.

Although accessible to all the council staff, the advisor will normally report to one senior officer; e.g. council's Director of Environmental Services.

A heritage advisor will initially work with the council staff and management to develop a heritage policy and heritage strategy. They need to agree on the areas the council and heritage advisor will address.

These areas include:

- deciding who will be involved
- establishing the community interests and expectations for heritage outcomes
- outlining the resources needed to implement the strategy.

Depending on the council and its needs, the heritage strategy may be very simple; for larger councils it may be more developed.

With an agreed strategic and operational framework established, the advisor will normally spend the morning with the council staff, such as planners, health and building inspectors and engineers. They will look at any current building and development applications that include heritage items.

Their afternoon is normally devoted to inspecting sites and providing advice directly to owners, usually on an appointment basis. The advisor may also be required to attend committee meetings; this is a must where heritage committees have been established.

A very important part of the advisor's role is to ensure the council and the local community have adequate access to heritage-focussed education, management and promotion. It is expected, for example, that the advisor will arrange for special training sessions for the council staff and local professionals, local councillors and for the community.

## How to access funding for a heritage advisor

Funding is now available to all councils across NSW. Applications can be made to the Office of Environment and Heritage (OEH). Check the [Local Government heritage Management funding program](#) web page for details and an application form.

The council will be reimbursed at the end of each financial year based on total GST-exclusive expenditure and the maximum approved funding available.

### Using NSW Government and Heritage Council logos

All funding provided through the NSW Heritage Grants program to support projects funded through the Local Government Heritage Management program must acknowledge the NSW Government funding support and use the [NSW Government logo and Heritage Council logos](#) on all signage for the project.

## **Use of NSW Government logo and Heritage Council logos**

All funding provided through the NSW Heritage Grants program to support projects funded through the Local Government Heritage Management program must acknowledge the NSW Government funding support and use the [NSW Government logo and Heritage Council logos](#) on all signage for the project.

## **How does the council appoint a heritage advisor?**

OEH will assist the councils to find a heritage advisor through the list of trained consultants. This list is available from OEH at [heritage@heritage.nsw.gov.au](mailto:heritage@heritage.nsw.gov.au)

It is suggested that councils seek expressions of interest from as many consultants as possible using the model included in Attachment A.

## **Fee for service**

The fees for service must be negotiated between the council and consultant. Fee proposals should include:

- a fee for attending the council area for eight hours, including disbursements and
- an hourly fee and a separate component for travel costs.

Although fees may be relatively low compared to normal consultancies, benefits for the consultant include the certainty of longer term involvement, working in local government and developing additional skill sets and knowledge that are useful in their heritage consultancy. They also receive backup services provided by council, such as office, computer access, phone, photographic supplies and possible local transport.

## **Longer term management**

Councils are encouraged to develop or engage their own in-house heritage expertise in the longer term. Options available to councils include:

- continue the current heritage advisory service
- develop heritage skills within existing staff and
- appoint new full-time or part-time specialist heritage staff to deliver council's heritage responsibilities.

## **Conflicts of interest**

The heritage advisor's key duties place certain restrictions on them undertaking other work within their local government area. These restrictions are designed to avoid any conflicts of interest.

## **Limits on the number of positions that a heritage advisor may hold at any one time**

OEH has decided to limit the number of councils that a heritage advisor may provide advice to at any one time to a total of five councils. This is ensure that:

- councils, communities and OEH receive efficient, efficient and timely advice from their heritage advisor
- there is a diversity of professional heritage viewpoints and advice provided to local councils and communities across a region and NSW

- opportunities are available for heritage professionals to build their capacity and experience in local council heritage management by taking on a heritage advisor role, and
- there continues to be a good pool of trained and experienced heritage professionals available to assist local councils and communities with heritage management.

## **Annual reporting**

Heritage advisors are required to work with the council's heritage officer, where there is one, to prepare an annual report monitoring the progress made against the current heritage strategy. OEH has an annual reporting template which must be used for this purpose.

- [Download the template](#)

# The heritage advisor

## What experience and skills should a heritage advisor have?

OEH maintains a list of trained heritage consultants who are available to work as heritage advisors. To be included on this list, consultants must have attended a training course and been accepted by OEH as suitable.

They must demonstrate their ability to meet the following criteria:

1. Be listed on the [Heritage Consultants Directory](#).
2. Attend at least a one-day heritage advisor training and refresher workshop with OEH, generally offered in August each year.
3. Have appropriate professional tertiary qualifications in a heritage-related field.
4. Have a good working knowledge of, and experience in, current heritage management theory and practice, including the Australia ICOMOS Burra Charter and OEH's management publications.
5. Have good knowledge and experience in applying relevant state and local government heritage legislation, including the NSW *Heritage Act 1977* and NSW *Environmental Planning and Assessment Act 1979*.
6. Have the ability and experience to prepare and implement heritage management strategies.
7. Provide leadership in delivering best practice heritage management outcomes for local government.
8. Be reasonably knowledgeable and experienced in heritage and urban design matters (in theory and practice) and be able to deal with such matters efficiently and effectively. Advisors are required to respond to many situations which impact on heritage management; e.g. planning, building, fire and access codes, urban design issues, funding, development control plans. They must be able to quickly comprehend complex situations, find options to contend with issues to satisfy a range of stakeholders and decision makers.
9. Be competent in preparing conservation management plans and heritage impact statements.
10. Be able to assess development applications and heritage documentation.
11. Be a good communicator and negotiator. As a decision maker, a heritage advisor must be able to communicate to a wide range of people from community stakeholders to councillors, both verbally and in writing, in ways that leads to good outcomes from a heritage point of view.
12. Be a good problem solver. They must be able to develop problem solving solutions. This requires a positive outlook, a willingness to find acceptable and alternative solutions, even if this takes time and be able to think laterally about issues. And certainly they must not be part of the problem!
13. Be able to manage their own time and work load and meet deadlines. A rural advisor typically has one day a month with their council. They need to be able to deal with issues quickly and effectively, document processes and decisions, preferably on the same day.

14. Have appropriate equipment to do the job and be totally comfortable with it: mobile phone, fax, computer and preferably a laptop, email and internet access and digital camera.
15. Continue to up-date their skills and knowledge in heritage management and urban design. Advisors must join, and participate in, OEH's email heritage network, regional heritage network (where available) and attend the annual local government heritage seminar.
16. Hold a current driver's licence.

## **Key duties for a heritage advisor**

The key duties for a heritage advisor are in Attachment B.

The advisor, in consultation with council's heritage officer, will prepare a policy and a heritage strategy on the heritage management objectives to be achieved. The heritage strategy must be based on OEH's publication, [\*Recommendations for local the council heritage management\*](#).

## The council's responsibilities and requirements

The council agrees to:

1. Where a new advisor is required, to seek OEH's assistance in calling for expressions of interest and request OEH's agreement to the proposed appointee.
2. Publicise the purpose and functions of the advisory service; e.g. by letter to heritage-listed owners, the council newsletter or local newspaper.
3. Acknowledge in relevant publicity and all reports that these services are being assisted by OEH (and to use [Heritage Council and OEH logos](#) on these materials).
4. Supply backup office facilities, including appointment-taking, telephone, office space and computer access to provide continuity for the heritage advisor on their visits.
5. Assist the advisor as fully as possible to promote heritage conservation in the community and resolve conflicts as they arise.
6. Seek advice from the advisor when considering *any* matter involving a heritage item or an urban design issue, whether listed or not. Further, agree that such advice will be taken into account in determining any matter involving a listed or unlisted heritage item and urban design and that the advisor's written advice will be included as stand-alone advice in any report or other material submitted for determination to the council or its delegate. This same provision applies where the advisor provides advice to the council, whether sought or not.
7. Explain in writing to the advisor why the council or its delegate has not accepted the advisor's advice on those occasions when this occurs.
8. Financially support, with OEH, the advisor's attendance at the annual local government heritage seminar. These costs shall be limited to reasonable transport costs, one overnight stay (if required) and an attendance fee at the daily agreed rate. Where the advisor works with more than one council, the cost is to be shared between the councils concerned. The payment can be drawn from the heritage advisory account to enable part of this payment to be claimed back from OEH.
9. Prepare a heritage strategy, as directed by OEH, in consultation with the heritage advisor on the objectives to be achieved in heritage management. This strategy must be based on OEH's publication, [Recommendations for local council heritage management](#). Prepare an annual report on implementing the council's current heritage strategy (this is done by the council's heritage advisor and heritage officer). Use the [Heritage Strategy Annual Report template](#).
10. The Heritage Strategy Annual Report accompanies the annual claim for fee reimbursement. It must be lodged with OEH by 15 May each year.
11. Include a summary of the Heritage Strategy Annual Report in the council's annual report and any State of the Environment report.
12. The council agrees to review the heritage advisor's performance and the agreed fee for service every 12 months. Remuneration will be reviewed within the context of satisfactory performance as well as increases in hourly rates and travel costs.
13. Where requested by OEH, to review the appointment of any current advisor, including the calling of expressions of interest in the position and the possible appointment of a new advisor. The circumstances of such a request could include the need for a consultant with more appropriate skills, the possibility of providing a more efficient service to the council due to rationalising services in the region and/or service by the current advisor being deemed unsatisfactory.

## **OEH responsibilities and requirements**

OEH's role is to:

1. Provide training for new advisors.
2. Support advisors, especially through its electronic heritage network, Heritage Network Seminar, and other learning opportunities.
3. Help councils find and appoint new advisors.
4. Provide guidelines and management frameworks to help councils fulfil their statutory obligations and manage and deliver heritage at the local level.

Where the advisor's position is jointly funded with OEH, the Heritage Branch will:

1. Approve the advisor to be appointed.
2. Receive a heritage strategy annual report on the program.

### **Performance**

If OEH is not satisfied with the performance of the consultant relating to any matters in this document, funding may be reduced or withdrawn at any time. The decision of OEH will be final in all matters.

### **Further information**

For further information contact the Heritage grants advisor at OEH:

By email [heritage@heritage.nsw.gov.au](mailto:heritage@heritage.nsw.gov.au)

By phone (02) 9873 8577.

# Attachment A Model expression of interest letter

## For councils to send to short-listed consultants

Add any other matters relevant to heritage management in the area

Proposed heritage advisor position for \_\_\_\_\_ council

The council is seeking to appoint a heritage advisor to positively promote and manage heritage and urban design in this council area.

I am pleased to invite you to express interest in this position.

The council's area includes \_\_\_\_\_ items listed for protection/proposed to be protected under the council's local environmental plan. The area also includes many unlisted heritage items.

It is proposed the heritage advisor will visit the area \_\_\_\_\_ times a [week/fortnight/ month] and preferably on a [day of week] \_\_\_\_\_.

The heritage advisor's primary objectives are to:

- work with the council to develop and deliver a heritage policy and heritage strategy
- provide professional advice to the council and community to help deliver good heritage and urban design management in the local government area.

The key duties for the heritage advisor are set out in Attachment B [attach to this letter].

If you are interested in becoming our heritage advisor, please send a letter and include the following:

- curriculum vitae
- confirmation you have completed OEH heritage advisor training and refresher workshops
- a brief statement outlining why you would be a good advisor for this area
- written statements demonstrating how you meet the heritage advisor eligibility criteria (refer to the OEH publication, *How to establish a heritage advisor service* available at: [www.environment.nsw.gov.au/resources/heritagebranch/heritage/infoHeritageAdvisorService.pdf](http://www.environment.nsw.gov.au/resources/heritagebranch/heritage/infoHeritageAdvisorService.pdf))
- contact details for two referees who support your suitability as a heritage advisor
- a fee proposal which includes your fee for an eight-hour visit (include all expenses) and inclusive of GST
- a fee to cover any travel costs, inclusive of GST
- an hourly rate for any advice requested between visits to the area, inclusive of GST.

[Include airfare information where relevant]: e.g. for your information the advance purchase price of a return air ticket from Sydney is \$\_\_\_\_\_. There is a service arriving at \_\_\_\_\_ am and leaving \_\_\_\_\_ pm on the following days \_\_\_\_\_. The council will arrange to meet you at the airport.

Please address your reply to \_\_\_\_\_ at the above before \_\_\_\_\_ [DATE]

If you have any queries, call \_\_\_\_\_ or email \_\_\_\_\_ at the council on \_\_\_\_\_ [EMAIL ADDRESS AND PHONE NUMBER].

Yours sincerely

[Council officer's name]  
[Position]

# **Attachment B      Model letter of offer and key duties for the heritage advisor**

## **For engaging a heritage advisor**

Dear \_\_\_\_\_

### **Letter of offer for the heritage advisor consultancy for \_\_\_\_\_**

I am pleased to advise you have been selected for this position.

It is jointly funded by the Office of Environment and Heritage and this council.

The main benefits of the heritage advisory program are that you will work with council staff, councillors and the community to provide an in-house consultancy service. You will have access to the best possible educational, management and promotional management for heritage and urban design in the local government area.

### **Role of the heritage advisor**

Your primary objectives as heritage advisor are to:

- work with the council to develop and deliver a heritage policy and heritage strategy
- provide professional advice to assist the council and the community to deliver good heritage and urban design management in the local government area

You will initially work with the council's staff, management and councillors to develop the heritage policy and a heritage strategy.

Use OEH's publication, Recommendations for local council heritage management to inform yourself about preparing and updating the local government heritage strategy. You can find this publication at [www.environment.nsw.gov.au/resources/heritagebranch/heritage/inforecommendationsforlocalcouncils.pdf](http://www.environment.nsw.gov.au/resources/heritagebranch/heritage/inforecommendationsforlocalcouncils.pdf). The strategy will generally be reviewed and updated every three years.

These policy and strategy documents will become the prime non-statutory strategic management documents for heritage management by this council.

The scope of the heritage policy and heritage strategy will require:

- agreement on outcomes to be delivered
- agreement on scope of the projects required to deliver on these outcomes
- involvement of community and key stakeholders in this process to establish interests and expectations  
and
- agreement on resources, timeframes and performance measures to implement the strategy.

Your key duties as heritage advisor are to:

- provide educational and promotional opportunities for heritage
- initiate research and studies for improved heritage management
- ensure effective statutory management of heritage
- manage heritage and development processes

- promote sustainable management of heritage
- liaise with, and assist, heritage owners and developers for best heritage outcomes
- promote incentives, including grants and funding for heritage
- work with the community and key stakeholder groups
- work with local professionals and tradespeople
- work with the council to manage its heritage assets
- provide advice concerning matters for action under the *NSW Heritage Act, 1977* when requested by OEH
- establish, in consultation with the local library and historical society, the collection of heritage resource material, including photographs, to assist heritage management and promotion in the area.

## **Supervision**

As heritage advisor you will be responsible to \_\_\_\_\_ at the council.

To achieve the objectives of the heritage advisor role within the framework set by the council's heritage strategy, you will be given reasonable freedom of operation. This includes direct negotiation with the local community, councillors, owners, developers, government and OEH, as well as making recommendations to the council.

## **Backup facilities**

Telephone, office space, computer access, appointment-taking facilities and use of council vehicles will be provided.

## **Terms of payment**

According to the fee for service proposal, the council has agreed to a daily payment of \$\_\_\_\_\_ including GST for an eight hour day which includes all your expenses and a payment of \$\_\_\_\_\_ including GST to cover your travel costs.

While in the area, you will be paid \_\_\_\_\_ cents per kilometre for using your own vehicle on inspections etc.

When your advice is required by the council in between your regular visits, you will be paid at the hourly rate of \$\_\_\_\_\_ including GST.

The council agrees to review your performance and the agreed fee for service every 12 months. Remuneration will be reviewed within the context of satisfactory performance as well as increases in hourly rates and travel costs.

## **Procedure for payment**

You will be required to lodge a claim for payment with \_\_\_\_\_ every month.

## **Restriction on other paid work due to conflict of interest**

While employed as an advisor you (or any other persons or firms with which you have a formal and/or financial association) may not undertake other paid work in this local government area. However, you may seek the council's agreement to the following exemptions:

- completion of an existing heritage project for architectural services commenced prior to appointment as the advisor
- work on any heritage or urban design matter provided it does not:

- involve a heritage item, a heritage site or an item in an urban conservation area whether listed or not  
or
- involve any item which might reasonably be expected to be the subject of advice by a heritage advisor  
or
- lead to a conflict of interest with your role as the heritage advisor.

### **General conditions**

Either party may terminate this agreement with one month's written notice. The terms of this contractual letter may be varied with the agreement of both parties and the endorsement of OEH.

### **Reporting**

Reporting requirements for heritage advisors require you to work with the council heritage officer, where there is one, to prepare an annual report monitoring progress made against the council's current heritage strategy. OEH has prepared an annual reporting template that must be used for this purpose. The template is available to download or complete online at: [www.environment.nsw.gov.au/Heritage/funding/locgovheritagemgt.htm](http://www.environment.nsw.gov.au/Heritage/funding/locgovheritagemgt.htm)

### **Commencement**

The council requires you to commence work on \_\_\_\_\_ and visit this council every \_\_\_\_\_.

### **Acceptance of this offer**

To accept this consultancy, if you agree with all the above terms and conditions, initial each page and sign and date a copy of this letter. Send it to the council not more than two (2) weeks from the date of this letter.

Yours sincerely

[Council officer's name]

[Position]

I accept the terms and conditions of this consultancy specified in this contractual letter.

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Attachment C Annual report on heritage strategy implementation

A requirement of the local government heritage advisor funding program is that each council has to prepare, adopt and implement a heritage strategy. This strategy must be based on OEH's publication, [Recommendations for local council heritage management](#), available on the [Local Government Heritage Management web page](#).

### Local government reporting requirements

As part of the funding agreement for a heritage advisor, the council must complete and submit an annual report on implementing its heritage strategy to OEH by 15 May each year. This report will usually be prepared by the council's heritage advisor and heritage officer.

All councils must use the Heritage Strategy Annual Report template

The heritage strategy [annual report template](#) outcomes and indicators are based on a standardised heritage strategy developed for the publication, [Recommendations for local council heritage management](#).

OEH will collate this data into an [annual report](#) on the NSW Heritage Grants Local Government Heritage Management program. This report will be made available on the Heritage website at the [Local Government Heritage Management web page](#).

### Lodging a heritage strategy annual report

As per the heritage advisor agreement, a copy of this annual report must be:

- lodged with the council for adoption
- lodged with OEH along with claims for payment by 15 May each financial year.