

# Conservation management plan checklist

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The purpose of this checklist is to provide heritage item owners and Conservation Management Plans (CMPs) authors with a short, simple series of prompts which can be used to guide the developing or revising of CMPs. The list comprises a series of questions, primarily but not solely linked to the Heritage Council of NSW *Statement of Best Practice for Conservation Management Plans*. It is indicative rather than prescriptive.

Section	Questions
Currency	<ul style="list-style-type: none"> <li>• When was the CMP written or reviewed, is it current?</li> <li>• Is the CMP to be published or otherwise launched and made publicly accessible?</li> </ul>
Content	<ul style="list-style-type: none"> <li>• Does the CMP include a range of content consistent with the Statement of Best Practice?</li> <li>• Are there any gaps in the content?</li> <li>• Is all the content relevant and necessary?</li> <li>• Are appropriate plans and images used to present information in a clear and simple way?</li> <li>• Have appropriate professionals contributed to the plan?</li> </ul>
Item description	<ul style="list-style-type: none"> <li>• Is the item described clearly?</li> <li>• Is there a location plan? Is the location of the item legible?</li> <li>• Is there a site plan? Are all elements of the site clearly and consistently identified?</li> <li>• Are the item's location, boundaries and curtilage described?</li> <li>• Is the history provided, explaining changes over time?</li> <li>• Are relevant Aboriginal heritage contexts explained?</li> </ul>

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Statement of significance	<ul style="list-style-type: none"><li>• Is the significance clearly presented and well-argued?</li><li>• Is there a single, concise statement of significance that clearly addresses the question of 'why is this item significant'?</li><li>• Is the Statement based on Australia ICOMOS Burra Charter principles?</li><li>• Does it reflect the full range of heritage significance of the item?</li><li>• Are the heritage values of greatest significance clearly identified, and linked to the item's attributes?</li><li>• Is the Statement supported by appropriate research?</li><li>• Is the Statement applicable for long-term conservation of the item rather than focused on a specific development?</li></ul>
Issues, opportunities and limits	<ul style="list-style-type: none"><li>• Are specific vulnerabilities or risks to the item clearly explained?</li><li>• Are appropriate future uses of the item explained, where changes are being considered?</li><li>• Is the item listed on the NSW State Heritage Register, or on a local government's Local Environment Plan, or the National Trust Register?</li><li>• Is the item listed on the National Heritage List or the UNESCO World Heritage List?</li><li>• Have the requirements of key stakeholders (e.g. local communities, local government, Aboriginal Land Council, State Government) been identified?</li></ul>
Use of research and expertise	<ul style="list-style-type: none"><li>• Has there been appropriate consultation with users and/or managers of the item?</li><li>• Has there been consultation with other stakeholders, including the Aboriginal community associated with the location of the item?</li><li>• Have measured drawings been prepared?</li><li>• If needed, has there been an archaeological survey, a condition survey, a geophysical investigation, a habitat or species survey?</li><li>• If needed, has there been historical research, including oral history and community research into social or aesthetic significance of the item?</li><li>• Do any elements or areas need further analysis? Are these identified?</li></ul>

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Section	Questions
Policies	<ul style="list-style-type: none"><li>• Are there policies which guide:<ul style="list-style-type: none"><li>– responsible stewardship of the item</li><li>– uses of the place, minimising change and ensuring the reversibility of changes</li><li>– management of problems associated with conservation of the item</li><li>– sympathetic adaptation of the place, or new work to it</li><li>– presentation, interpretation, education, and community engagement with the place, where appropriate?</li></ul></li><li>• Do the policies for new development provide guidance on new design and physical characteristics that are appropriate to the item's significance?</li><li>• Are the policies clearly derived from and linked to the statement of significance and research or investigations?</li><li>• Is there a schedule of conservation works for the short, medium, and long terms?</li></ul>
Maintenance plans	<ul style="list-style-type: none"><li>• Is adequate guidance provided regarding ongoing maintenance of the item</li><li>• Is an overall framework for maintenance indicated?</li><li>• Are more specific schedules provided covering, for example, cleaning, painting – and confirming responsibilities for the various aspects of maintenance?</li></ul>

## References

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

[Conservation management plans](#)

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

National Trust (NSW) Register

National Heritage List

[NSW State Heritage Inventory](#)

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

UNESCO World Heritage List

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Version no.

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