
F Examples of public sector asset management guidelines

F.1 Examples of asset management guidelines

Best practice heritage guidelines emphasise the need to ensure that strategies for managing a heritage asset are consistent with the organisation's corporate objectives and with the asset management requirements of its overall portfolio.

NSW Government – Heritage Asset Management Guidelines

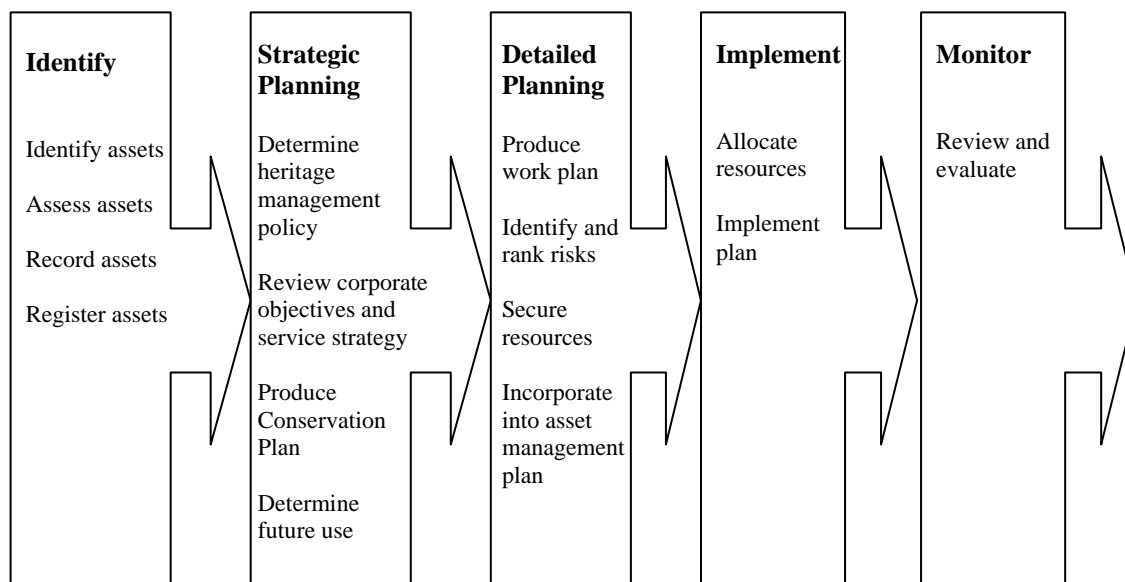
The NSW Government has issued heritage guidelines to its agencies as part of a total asset management framework which views heritage as one aspect in the management of the asset:

The management of heritage issues should be viewed as an essential part of the management of the assets, rather than another problem and cost impost. Sustainable management of heritage values should be treated by an agency as part of its core business. (GMAC 2003, p. 13)

The first step, identification, involves the agency establishing what heritage assets it has under its control and what condition they are in. Ideally, this would involve advice from a heritage professional on the cultural significance of the place. The purpose of identification is to ensure that adequate information is available on the asset for detailed management planning in the short-term and longer-term strategic planning. Heritage assets identified are then registered for inclusion on the State Heritage Inventory Program.

Strategic planning involves assessing how the asset fits in with the agency's corporate objectives and the service delivery strategies. At this stage in the process, an agency will plan the future use of an asset (whether it is to be retained in its current use, adaptively reused, or whether it will be sold or transferred to another agency). It will also establish heritage management policies which should involve the development of a conservation plan incorporated into the agency's overall asset management plan.

Figure F.1 Heritage management process
 NSW Government – Heritage Asset Management Guidelines



Source: NSW Government Asset Management Committee (GAMC) (2001a), p. 11.

Professional expertise should be sought by employing experienced conservation practitioners to prepare a Conservation Plan for individual items or groups of items where appropriate.

A good Conservation Plan is an essential problem-solving tool, which clearly establishes the significance of the heritage asset. It may make recommendations for future use, however there is no standard brief. Conservation Plans should be reviewed regularly and updated as necessary. (GAMC 2001a, p. 14)

Once strategic planning has been undertaken, a detailed management plan should be established for the individual heritage asset. This includes: identifying and prioritising conservation tasks; identifying the resources and the risks involved in the preferred management plan; and preparing a maintenance plan.

Once the plan has been developed, the agency can implement it and put in place a review process to monitor outcomes.

English Heritage – guidance for local government

English Heritage has established a set of guiding principles for local authorities in England which own heritage assets (some of which are outlined in box F.1). However, the principles have broad applicability to all governments. The principles developed by English Heritage emphasise a ‘whole-of-government’ approach and also calls for the appointment of heritage ‘champions’ to ensure a coordinated approach to management and that heritage interests are not overlooked by the local authority. The guidelines developed by English Heritage encourage local governments to explicitly consider the costs and benefits of retention in current use and, where warranted, to seek an alternative use or dispose of the asset.

Box F.1 English Heritage: Management principles for local government

Setting a good example

It is essential to local authorities’ credibility as stewards of the historic environment that they set a good example in the management of their own heritage assets. This means demonstrably achieving the standards they expect of others.

The benefits of good governance in managing local authority heritage assets and the repercussions of failure to utilise or maintain them adequately, especially historic buildings of long-standing civic importance (such as town halls, assembly rooms and swimming baths) should not be underestimated. Credibility in action to secure the future of heritage assets in private ownership depends on the stewardship of council-owned assets.

Making the most of heritage assets

Many heritage assets, particularly historic buildings that have, or had, a functional purpose, are capable of continuing beneficial use.

Local authority buildings represent a major public investment. Although such buildings need not always remain in public ownership, being generally well constructed, they can be inherently sustainable and often capable of significant adaptation to meet an authority’s changing needs.

Know what you own

In order to review and rationalise council-owned property and provide for funding and managing heritage assets, it is essential to have full and up-to-date information on the extent, nature and physical condition of the estate ... Such information provides the basis for effective management of property assets and needs to be both available and accessible.

Develop a council-wide strategy

An over-arching strategy for council property, regularly reviewed within the authority’s overall strategic plans, will be the key to keeping heritage assets in compatible uses, or determining appropriate disposal ... The local authority’s over-arching strategy for its property should support its wider strategic

Continued...

Box F.1(cont)

priorities. The long-term maintenance and repair, and appropriate use, of council-owned historic buildings and other heritage assets, such as parks and gardens, should therefore be identified as a strategic objective in the council's community and corporate plans — not least because of the wider cultural, social and environmental value that these assets may have regionally, as well as for the local community.

Understanding as the basis for management

Understanding the nature, significance, condition and potential of a heritage asset must be the basis for rational decisions about its management, use, alteration or disposal.

A sound, but succinct, understanding of a heritage asset is essential in order to determine why and how it is significant. This in turn highlights the opportunities for and constraints on change, and informs decisions about management, alterations, or disposal. Clear understanding must also provide the basis for the detailed planning brief that normally should be prepared when disposal is considered.

The importance of maintenance

Planned maintenance and repair programmes are essential for all heritage assets, and should be based on regular, detailed inspections and condition reports.

Best value reviews give local authorities the opportunity fundamentally to re-examine management of their properties. These reviews, and the asset management plan process, should provide the context in which managers can prioritise and set maintenance programmes and predict the future of maintenance needs. It may therefore be useful to link cyclical inspections and reports on the condition of heritage assets with a best value review. A higher standard of maintenance is likely to be required for heritage assets than for the corporate property estate as a whole and management arrangements should make this explicit.

Take a positive attitude to disposal

The disposal of heritage assets, especially those that are potentially straightforward to adapt to alternative uses may provide the best solution for such property.

... A distinction should be made, however, between those assets whose historic importance rests largely on their character as public buildings and those that are only in public ownership by chance. For the former, every effort should be made to continue their core civic/public uses. If that is not reasonably achievable, disposal should take account of the community interest in the public spaces, perhaps through a partnership arrangement (say with a private sector partner, or a building preservation or community trust).

Obtain optimum value

The aim on disposal of heritage assets should be to obtain optimum value, rather than the highest price.

The aim should be to obtain the best return for the taxpayer that is consistent with government policies for the protection of heritage assets: this may well limit the realisation of potential development values.

Source: English Heritage (2003), pp. 7–9.