

# Owning a heritage property

*For those who own, or intend to purchase a heritage listed property there may be some concern as to how listing will affect their use and enjoyment of it.*

## HERITAGE ASSET MANAGEMENT

In addition to normal property management issues, owners of heritage listed property need to take account of cultural significance; this is sometimes referred to as 'heritage asset management'. Heritage asset management means the integration of cultural significance and conservation activities with responsible property management.

## CULTURAL SIGNIFICANCE

Statements of significance precisely describe what is important about a property with respect to heritage listing. Such statements should form the basis of recommendations for the general processes of conservation, preservation, maintenance, restoration, reconstruction or adaptation. Such processes when used individually or together assist the retention of cultural significance of the property.

These recommendations should be carefully integrated with other property management processes such as planning for change or preparing for maintenance in the short, medium and longer terms. The emphasis of an integrated approach should be the retention or enhancement of cultural significance balanced with other relevant property management concerns so that the overall approach is both achievable and advantageous to the viability of the property.

## USES

Whether contemplating the purchase of a heritage listed property or reappraising the management of an existing property it is important to think about whether the property can be adapted to different uses without destroying its heritage value.

Different uses may require unacceptable changes to culturally significant fabric. For example, if uses for a heritage listed house were being considered, its re-use as medical consulting rooms may require less internal alteration than, say, open-plan offices which in turn might be better accommodated in a former warehouse.

For some properties the continuation of existing uses can place inappropriate demands on significant fabric. Other buildings derive significance from the fact that historical uses still persist. Changing trading patterns for some hotels in recent times has seen demands firstly for the expansion and then for the contraction of ground floor open space.

When planning for such changes it is important to have a clear understanding of what fabric is culturally significant so that an appropriate balance may be struck between accommodation of changing uses and retention of important fabric.

In some cases the apparent restrictions arising from cultural significance may suggest surprising new and compatible uses. In all cases the impact of intended uses needs to take into account the consequences of their accommodation on culturally significant fabric as an early part of the processes of property management.

## PLANNING

Key to the achievable retention of cultural significance as part of property management is planning. This involves the ordered collection of existing information on the property as well as defining intended outcomes as precisely as possible, and can be considered under three main headings:

- assessment of existing condition of property
- planning for maintenance and other conservation action
- for adaptation and additions or part demolition.

For any property, whether heritage listed or not, currently owned or recently purchased, it is important to understand its existing condition and faults. The detailed collection of this information is called a dilapidation survey. Such surveys should be prepared in anticipation of work to correct any identified faults and are therefore best done as part of documentation for these works. Indeed, the lack of a clear understanding of the extent and nature of dilapidation can lead to disputes between tradespeople and building owners and result in inappropriate repair work carried out.

If prepared with a good understanding of a building's cultural significance, the dilapidation survey is a useful basis for the reinstatement of lost or damaged important features. Detailed knowledge as to the nature and extent of dilapidation is also important for financial planning and the ability to compare the tenders or prices received to undertake rectification works.

Where the owners of a heritage listed property are happy with its accommodation and wish to simply repair the property, the preparation of appropriate documentation is important to ensure that repair work is carried out correctly. As modern building practices are sometimes inappropriate for the repair of older properties it is important to define correct methods precisely. In addition, the extent of repair needs to be carefully assessed against cultural significance.

Evidence of ageing is sometimes considered important and should not be removed as part of repair works. In addition to repair, the careful definition of maintenance processes is important as modern practices can sometimes damage older buildings as rapidly as the total absence of maintenance. As for the preparation of a dilapidation survey, the precise definition of prioritised conservation needs is a useful tool in financial planning for property management.

It is often the case that owners need to alter their heritage properties. As for any property, careful definition of the apparent need and the shortcomings of the existing situation is an essential pre-requisite to good property management and financial planning. Often it is necessary to improve the quality and extent of services in a heritage building.

It is generally possible to introduce services such as air conditioning, lighting, information technology and the like in ways that do not compromise the building's importance. In some instances the introduction of fire protection services can greatly increase the variety of uses to which a building can be put and therefore improve its financial viability. Where extensive alterations are contemplated, or where the property is particularly significant, it is appropriate to obtain expert advice. It is, of course, important to discuss any proposed changes with the relevant regulatory authorities.

## MAINTENANCE

Having just acquired or repaired an asset, it would be irresponsible to neglect it only to face significant financial burdens of extensive repairs in the future. Heritage buildings, just like any others, require regular maintenance. The development of, and adherence to, a well planned maintenance programme will greatly reduce repair costs and extend the life of any building.

Generally, careful planning of maintenance for any building involves regular and detailed monitoring of the building fabric and taking action in a coordinated manner. For example, leaking downpipes can result in cracking of some masonry walls and extensive damage to internal and external finishes. Regular maintenance inspections will detect leaks before they cause too much damage, and coordinated repair should result in the leaks being repaired before deterioration of the internal and external finishes.

## INSURANCE

Heritage properties can usually be insured with no greater risk for the insurance company than any other building or structure. Each situation should be evaluated according to circumstances. Where property damage is extensive and the culturally significant aspects of the building are lost heritage owners are not forced to reconstruct their original places.

Where there is partial damage an owner may need to replace materials with original or as close to original materials as possible. Insurance providers may be interested in knowing the costs of replacing original and significant building components of heritage places so that adequate cover for their replacement can be arranged.

The approach to cover should reflect the age, construction and condition of the building rather than the status of the building on any heritage list.

## REGULATORY AUTHORITIES

It is generally the case that substantial work on any building requires the approval of at least one of a number of regulatory authorities. The reason for this level of regulation is not only for aesthetic reasons, but also to ensure that procedures or materials which are harmful to the fabric of the building are not used.

In order to obtain approval for development, whether it is heritage listed or not, it is necessary to lodge an application with adequate documentation identifying the proposed work and how it is to be carried out. Clearly, the documentation described in previous sections is extremely useful in obtaining these approvals.

Prior to commencing documentation it is recommended that the property owner discuss proposed work with Heritage South Australia's architects and advisers.

### More information

#### Heritage South Australia

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