**CONSERVATION STUDY**

**SCHEDULES 1 – 2**

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# SERVICES – GENERAL

## Terminology

This document is intended for use in conjunction with the Conditions of contract for provision of minor professional services. Terminology defined in the Conditions has the same meaning in this Schedule 1.

## Services

The Contractor shall carry out the services in accordance with the Contract, the Schedules and the project brief.

## Contract Price – Fees and Disbursements

The fixed or indicative fee component of the contract price shall include GST and shall include Contractor time (including hours spent in country, interstate and international travel) and all general administration costs including telephone calls, facsimiles, courier services, photocopying, presentation material, printing (except tender/contract documentation) interstate and/or international travel costs for attendance in Adelaide as part of the Contractor’s provision of the services and travel costs in the metropolitan area (within 32 km of the Adelaide GPO). No additional fee payment will be made for these items.

The fixed or indicative disbursement component of the contract price shall include GST and may include country, interstate and international travel and accommodation costs, (except where incurred for attendance in Adelaide as part of the Contractor’s provision of the services), costs for the preparation of perspectives and models, costs for soils testing, survey, statutory fees, dilapidation reports, printing (tender/contract documentation) and other costs as agreed. Payment of disbursements will be made as the expenditure is incurred and for actual amounts incurred.

If after execution of the Contract there is a requirement for the Contractor to undertake additional work, the Contractor must if required submit a revised fee on the basis of the fixed and indicative fees and disbursements. Revised fees which are not consistent with the contract price or with Department of Planning, Transport and Infrastructure (DPTI) market data on fees and disbursements for similar projects may be rejected.

## Contract Material

The Contractor shall prepare any contract material as required by the Brief and necessary for the execution of the project and review it for completeness and correctness and with a view to omitting any ambiguity and inconsistency.

If contract material does not comply with the Contract the Client may require the Contractor to revise the contract material without being liable to the Contractor for any extra costs incurred as a result of such revision. If the Client requires revision for any other purpose, the work involved shall be treated as a variation as provided in the Contract.

Any omission by the Client to require revision or amendment of any contract material shall not constitute an acknowledgment or admission that such contract material is correct in detail as to measurement dimensions materials or in any other particular, the responsibility for which shall remain the Contractor’s. No approval, direction or assistance given to the Contractor whether by the Client the construction contract principal or by any statutory body whether acting in pursuance of its statutory functions or otherwise in respect of contract material shall relieve the Contractor of responsibility under the Contract.

## DPTI Publications, Policies and Guidenotes

Any contract material must be consistent with published Department of Planning, Transport and Infrastructure (DPTI) and lead agency policies and standards relevant to the project and in particular with the 5-step Infrastructure Planning and Delivery Framework, PC028 Construction Procurement Policy: Project Implementation Process and the Urban Design Charter.

DPTI Guide notes can be found in the BPIMS Library at http://www.bpims.sa.gov.au/bpims/library/library\_frameset\_1.htm.

## Conservation Study Services

The Contractor will consult and liaise with DPTI Design and Heritage Management unit throughout the services and ensure that the Conservation Plan is delivered in accordance with this brief.

### Collection of Information

The Contractor shall collect, collate and present historical evidence sufficient to establish the cultural significance of the place, in both a regional and state context. Sources of information should include primary and secondary documentary sources and a physical survey of the building.

The Contractor shall ascertain the extent and relevance of available information before submitting a tender.

### Physical Survey

The Contractor shall undertake a physical survey of the historic building, and its relevant surrounds within the boundaries of the original site. The result of this survey should be presented in written form, supplemented by drawings, diagrams and photographs. The purpose of the survey is:

* to provide a detailed description of the fabric;
* to identify the original form, construction and materials of the structures and site (gardens etc), and to illustrate different stages of construction and subsequent changes;
* to determine the dilapidation of the structure and its components (including landscape elements such as entrance gate and garden plantings);
* to identify the original internal decorative schemes including furniture and fittings, and subsequent changes;
* to identify the original internal and external colour schemes; and
* to establish redevelopment parameters of the historic building and site including drafting of site curtilages for school accommodation expansion/reconfiguration, and to comment on the impact, if any, these parameters may have on the recently completed feasibility study for the school’s redevelopment.

The physical survey shall be presented so that it can form the basis of documentation required for correction of dilapidation.

### Cultural Significance

The Contractor shall prepare a Statement of Cultural Significance based on the history of the place, the physical survey and other relevant information. The consideration of cultural significance should address the criteria used in the assessment of places for the State Heritage Register and should show a logical progression from the information gathered.

Where appropriate, relative levels of significance should be assigned to various elements in accordance with their contribution to the cultural qualities of the place.

### Conservation Policies

The Contractor is to develop and present Conservation Policies that will apply to the conservation, maintenance and security of the place. These policies shall be firmly based on the Statement of Cultural Significance and on accepted standards of practice, including but not restricted to those outlined in J.S. Kerr “The Conservation Plan” and in “The Burra Charter”. The policies are to include consideration of the following issues:-

* urgent conservation works;
* the reconstruction or restoration of historic fabric;
* the redevelopment opportunities and parameters of the building(s) and site;
* the ongoing maintenance requirements of the Place.

### Conservation Action

The Contractor shall identify in detail the conservation action required to give effect to the conservation policies. A maintenance program should be provided to guide future cyclical maintenance of the place.

The presentation of this information should identify the recommended staging of the works consistent with established priority.

### Cost Plan

The consultant shall provide a cost for priority conservation works.

## Deliverable – Conservation Plan

The following guide has prepared to identify the minimum requirements of the report/plan to be submitted.

The purpose of the Conservation Plan is to guide the redevelopment, conservation and ongoing maintenance of the State Heritage Place, based on an understanding of its history and significance and an investigation of its physical condition.

The Conservation Plan shall contain at least the following sections.

ACKNOWLEDGEMENTS

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The plan is to be presented in A4 format. The drawings and report shall be printed on one face only and be suitable for photocopying.

Illustrations in the report should be pen and ink lined drawings and black and white or colour photographs. Copies of measured drawings, and any additional drawings required to describe the conservation action, may be presented in A3 fold-out format.

The Contractor shall allow to present a rough draft and a final draft of the report for review. The Contractor shall also provide measured drawings (floor plans, external elevations and cross sections) of the State Heritage Place and a site plan of the property showing the locations of all related elements. The report and drawings shall be provided to the Client in electronic format.

## Cost Management

The Contractor shall select and engage a cost manager as a subcontractor.

The format for presentation of estimates shall be in accordance with the standard provided by DPTI - refer to the Guide Notes for Contractors. The relevant party shall estimate the engineering components.

## Subcontractors

There is a requirement for the following subcontractors to be engaged by the Contractor.

|  |
| --- |
| **Discipline** |
| Cost Manager |
| Historian |
| Other |

## Fees and Disbursements

The fixed fee shall include GST, Contractor time (including hours spent in country, interstate and international travel) and all general administration costs including telephone calls, facsimiles, courier services, photocopying, presentation material, printing (except tender/contract documentation) and travel costs in the metropolitan area (within 32 kms of the Adelaide GPO). No additional fee payment will be made for these items.

The Contractor shall provide the following disbursements and shall be responsible for arranging and coordinating services associated with disbursements and for making payment.

|  |
| --- |
| **Disbursement** |
| Accommodation |
| Travel |
| Statutory fees (if required) |

The upper limit disbursements shall include GST, country, interstate and international travel and accommodation costs, costs for the preparation of perspectives and models, costs for soils testing, survey, statutory fees, dilapidation reports and other costs as agreed. Payment of disbursements will be made as the expenditure is incurred and for actual amounts incurred.

## Services Program

The program for the Conservation Study is:

Submit rough draft report 8 weeks after contract award

Review period 10 weeks after contract award

Submit final draft report 13 weeks after contract award

**Review Period of 2 Weeks**

Lodge final report 16 weeks after contract award

# Project Details

## Terminology

This document is intended for use in conjunction with the Conditions of contract for provision of minor professional services. Terminology defined in the Contract has the same meaning in this Schedule.

## Background

General commentary on completed work and need for the project

## State Heritage Place Description

General description of place

## Role of DPTI

DPTI manages the Historic Buildings Conservation Program on behalf of government with a particular focus on government owned State Heritage Places. It has recognised that a Conservation Plan is required to guide the redevelopment, conservation and ongoing maintenance of this particular Place.