



New Zealand  
**Historic Places Trust** *Kouhere Taonga*

**SUSTAINABLE MANAGEMENT  
OF  
HISTORIC HERITAGE**

**Discussion Paper No.2**

**Assessment of Effects on the  
Historic Environment**



3 August 2007

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## **Sustainable Management of Historic Heritage Guidelines**

### **Discussion Paper No.2**

#### **Assessment of Effects on the Historic Environment**

Authors: Robert McClean with the assistance of Chris Cochran, Michael Kelly and Karen Greig

This discussion paper was approved by the Board for public distribution on 3 August 2007.

While the NZHPT acknowledges the contribution of other agencies and organisations, the opinions and views expressed in this guide are those of the NZHPT only.

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## **The Assessment of Effects on the Historic Environment**

The RMA provides for the protection of historic heritage from inappropriate subdivision, use and development as a matter of national importance.<sup>1</sup> As outlined in Discussion Paper No.1 of the *Sustainable Management of Historic Heritage* series, the NZHPT has developed a list of draft principles as a guide for the assessment of inappropriate subdivision, use and development. In addition to the principles, detailed guidance is necessary to provide a framework for assessing effects on the historic environment.

This discussion paper provides a framework for the assessment of effects on historic heritage values. The framework is limited to activities involving historic buildings and sites, surroundings associated with historic heritage, historic areas, places/areas of significance to Maori, subdivision, advertising signs, and designations.

While these activities involve the 'core' of historic heritage, assessing activities on other types of historic heritage such as heritage gardens and trees is also important. The NZHPT recommends the adoption of guidance developed by heritage agencies such as Heritage Victoria and NSW Heritage Office and obtaining professional advice for these activities.

The NZHPT is seeking to promote the standards contained in this discussion paper for use in assessment of effects on the environment statements (AEE), regional and district plans and in resource consent processes.

The original basis for the standards contained in this paper is the set of heritage planning guidelines developed by Heritage Victoria, Australia, in 2000. These guidelines were developed for the assessment of heritage planning applications in Victoria State. The NZHPT has incorporated guidance material from other international jurisdictions and included new standards applicable to the unique New Zealand context, especially relating to Maori heritage and historic sites.

It is emphasised that the standards contained in this discussion paper will be subject to ongoing review and updating in line with both international and national practice.

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<sup>1</sup> Section 6(f), RMA 1991

## **General Principles for Assessing Adverse Effects of Subdivision, Use and Development on Historic Heritage Values**

### **Principles**

#### **Respect values**

Recognising the lasting values of the place or area and evidence of the origins and development of New Zealand's distinct peoples and society.

#### **Diversity and Community Resources**

Recognising the diverse cultures of New Zealand and the diverse social and physical environments and communities. There is a need to take into account the needs, abilities and resources of particular communities, including owners of historic heritage and stakeholders.

#### **Sustainability**

Recognising the finite nature of historic heritage and the need to take a precautionary approach in order to safeguard the options for present and future generations. Promoting sustainability may include encouraging regular maintenance and finding compatible uses for places, including original and new adaptive uses.

#### **Maori heritage**

Recognising and providing for the relationship of Maori and their culture and traditions with their ancestral lands, water, sites, wahi tapu and other taonga following the spirit and intent of the Treaty of Waitangi (Te Tiriti of Waitangi).

#### **Research and documentation**

Ensuring interventions are informed by sufficient research, documentation and recording, where culturally appropriate. All changes should be fully documented in drawings and photographs.

#### **Respect for physical material**

The degree to which interventions involve the least possible loss of heritage significance and the least loss of material of heritage value, including any irreversible or cumulative effects. This may be achieved by promoting repair (rather than replacement), repairing in compatible materials, respecting the patina of age, and making new work reversible.

#### **Understanding significance**

Whether the values of the place are clearly understood before decisions are taken that may result in change. Decision making, where change is being contemplated, should take into account all relevant values, cultural knowledge and disciplines. Understanding significance

should be assisted by methods such as the preparation of heritage assessments and conservation plans.

**Respect for contents, curtilage and setting**

The extent to which interventions respect the contents and surroundings associated with the place. This may be achieved by ensuring, for example, that any alterations and additions to buildings, and new adjacent buildings, are compatible in terms of design, proportions, scale and materials.

# Assessing Impacts on Historic Places (Buildings)

## Repair and Maintenance of Historic Buildings

### Principles

Regular repair and maintenance of historic buildings is encouraged.<sup>2</sup> Generally, repair work will involve replacing existing fabric with a similar new material.<sup>3</sup> When carrying out repairs and maintenance:

- The repair should be achieved by the use of compatible materials.
- The use of incompatible materials should be avoided.
- The evidence of history should be respected.
- Restoration and reconstruction should generally only take place where there is clear evidence of original form and detail.
- New work should be kept to a minimum and be compatible with long term conservation of heritage place.
- Any art work, special fabric or heritage objects situated at the place and that contributes to the significance of the building or structure, should be cared for in accordance with sound conservation practice.
- Ensure new work is appropriately recorded.

It is good practice that a maintenance plan and repair specification schedule is prepared by a heritage professional. This documentation should inform and guide the repair and maintenance of historic buildings and structures.

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<sup>2</sup> The term 'building' is used to include structures as defined in the Building Act 2004

<sup>3</sup> There is little case law guidance in New Zealand on what works actually constitute 'repairs and maintenance'. In the English context this matter has been extensively covered in appeals in relating to valued added tax provisions (which apply to alterations but not to repairs or maintenance). See, Charles Mynors, 'Value added tax and the heritage: part 2, *Context 94*, May 2006, pp 8-9

### **Checklist for assessing appropriate repairs and maintenance works**

- The work involves stabilisation, preservation and conservation as defined in the ICOMOS NZ Charter for the Conservation of Places of Cultural Heritage Value, 1993 (the ICOMOS Charter).
- The work does not involve alterations, additions (including reconstruction as defined in the ICOMOS Charter), relocation, partial demolition and demolition (otherwise other standards apply).
- The work involves the restoration to good or sound condition of any existing building or any part of an existing building.
- The work involves the patching, restoration or minor replacement of materials, elements, components, equipment and fixtures for the purposes of maintaining such materials, elements, components, equipment and fixtures in good or sound condition.
- Any redecoration work involves the renewal, restoration or new application of surface finishes, decorative elements, minor fittings and fixtures and floor coverings which does not destroy, compromise, damage or impair the appreciation of the heritage values of the element being redecorated.<sup>4</sup>
- The work carried out on the building shall generally match the original in terms of quality, materials and detailing.
- Repair of material or of a site should generally be with original or similar materials. However, repair of technically higher standard than the original workmanship or materials may be justified where the life expectancy of the site or material is increased, the new material is compatible with the old and any heritage value is not diminished.
- The work is for the purposes of keeping the building in good condition.
- The work does not result in any increase in the area of land occupied by the building.
- The work does not change the character, scale and intensity of any effects of the building on the environment (except to reduce any adverse effects or increase any positive effects) but does not include upgrading.
- No painting is to be applied to any previously unpainted surface or render to previously unplastered wall surfaces. New paint should not adopt brush or extreme colours and the adoption of 'corporate colours' should be discouraged.

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<sup>4</sup> Auckland City Council, *Central Area District Plan*, December 2004



- Repair work should be carried out by a tradesperson with experience in working with heritage buildings.

## Alterations and Additions to Historic Buildings

### Principles

NZHPT endorses adapting historic places for maintaining continuity of use or new uses where it is necessary to ensure the place retains liveability and utility. Adaptation means modifying a place to suit it to a compatible use, involving the least possible loss of cultural heritage value.<sup>5</sup>

Adaptation proposals may involve alterations and additions. It is important that any alterations and additions are carefully designed to:

- Retain surviving internal and external heritage fabric as far as possible and disturb, distort or obscure it as little as possible.
- Respect the design, form, scale, materials, workmanship, patina of age, colours, contents, location, curtilage and setting, including alterations that have heritage value.
- Avoid work that will compromise or obscure fabric of heritage value.
- Ensure any new work is of a scale and location that it does not dominate the heritage place and respects its setting.
- New work should be appropriately recorded.

Alterations and additions may include restoration and reconstruction work as defined by the ICOMOS NZ Charter.

It is good practice that a conservation plan, prepared by a heritage professional, should inform and guide alterations of historic buildings.

### Checklist for assessing appropriate internal alterations to buildings

- The work does not alter, obscure or remove significant heritage fabric and fixtures.
- Ceiling heights and surfaces and significant ceiling decoration are retained and conserved. For example, the work should not alter significant interior volumes by raising floor levels or creating partitions.
- The work retains and conserves significant interior finishes such as original or early wallpaper, paint, stencilling, marbling, wood graining, panelling, plastering and ceramic tile surfaces.

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<sup>5</sup> ICOMOS New Zealand Charter for the Conservation of Places of Cultural Heritage Value (1993)

- Historic patterns of access and movement (i.e. entrances, hallways, stairways and passageways) are retained.
- Modern services, such as smoke detectors and sprinkler heads are installed using concealed methods.
- Engineering work is discreetly installed. For example, seismic bracing should not be visible through prominent windows.

**Checklist for assessing appropriate external alterations to buildings**

- The original form of the roof, significant roofing materials, significant chimneys, and other features such as original gutters and downpipes are retained.
- Important views of the building are retained, especially when new elements to the roof such as skylights, solar collectors, wind turbines or satellite dishes are introduced.
- Adverse visual effects resulting from the installation of dormer or attic windows in the roof are avoided. The size, design and position of additions should ensure that they respect the architectural style and scale of the building and do not dominate the roof.
- Any alterations to historic walls are undertaken in a material to match that of the original, with consideration given to colour, texture, composition, dimensions and detailing.
- New cladding material should closely match the original. For example, artificial cladding, such as vinyl or aluminium, is not normally appropriate for use on a historic building.
- Secondary elements of the exterior (such as windows and doors) should be repaired rather than replaced.
- The installation of new openings (such as windows and doors) to principal facades and elevations should be generally avoided. Any new window or door opening should be sympathetically designed but clearly distinguishable as a new alteration.
- Double glazing should be discouraged. Instead, secondary glazing should be adopted in a manner that should not obscure the original window or the design pattern of sash joinery or alter the depth of the window recess or create a reflective effect.
- Significant doors, original or early hardware (doorknobs, locks etc), and door surrounds (fanlights, pilasters, sidelights etc) should be retained and repaired appropriately.

- New security measures (e.g. doors and screens) should not detract from the features of a heritage place. Any new security door should be simple and unobtrusive.
- Seismic strengthening work should be concealed or incorporated into the existing fabric.

### **Checklist for assessing appropriate additions to buildings and structures**

- New additions should be to the rear of the building or set back from significant elevations, including the roof elevation.<sup>6</sup>
- Any addition to significant façade(s) of the original building, including the roof, should be avoided.
- New additions should be compatible (able to co-exist) in terms of materials, scale, size, proportions, mass, height, setback, texture, colour, plan configuration, surface configuration and other details to adjoining and/or surrounding significant buildings.
- New additions should be distinguishable from the original. New work should be harmonious and sympathetic with the significant features of the place. The contrast should not be obvious or visually obtrusive.<sup>7</sup>
- Where the new work is proposed to be of a greater height than the original building consideration should be given to the effect of the work on views to the building. Sightlines should be provided with the application.
- New additions should be compatible to the original design and detailing.<sup>8</sup> Successful examples usually involve new structures being smaller in scale with larger setback, built of similar materials but in a modern design.<sup>9</sup>
- If the significant building has a form that is distinctive in its immediate locality, any new building at the place or within its setting should not imitate or mimic that form.<sup>10</sup>

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<sup>6</sup> In some instances it may be found that each elevation has a carefully considered design element, making additions and extensions more difficult to include. In these cases an understanding of the significance of the place, including the design philosophy approach, should be considered.

<sup>7</sup> This can be achieved by making the new material slightly recessed; a different material to the old; a different texture; surface treatment or by dating the new.

<sup>8</sup> New work is made compatible with the original by maintaining proportions, scale, materials, textures and colours, but varying the design in subtle ways to allow it to be seen as later work. Chris Cochran, *Guidelines for Altering Heritage Buildings*, NZHPT, 2000, p 5

<sup>9</sup> The Australian ICOMOS Charter for the Conservation of Places of Cultural Significance (the Burra Charter), 1999, p 67

<sup>10</sup> *ibid*, p 66

- New additions should maintain the rhythm, orientation and proportions of the original, especially where these contribute to the significance of the place.<sup>11</sup>
- A large addition should be constructed in a way that clearly separates it from the original building. The two may be joined by means of a visually unobtrusive link.
- New additions should use existing openings to allow access between the old and the new. This will minimise adverse effects on significant fabric.
- The roof of any new addition should be compatible to the existing roof form or follow traditional forms.
- New additions should preserve existing significant views to and from the heritage place and its setting.
- New additions should avoid permanent damage to significant fabric.

## **Relocation of Historic Buildings**

### **Principles**

Relocation will generally have a serious adverse effect on the significance of a place. The NZHPT encourages the retention of significant heritage buildings and structures on their original sites and in their original settings. Relocation should be discouraged except in circumstances where:

- The existing site or setting is not of significant heritage value.
- Relocation is required to save the building as a last resort.
- Continuity of heritage value cannot otherwise occur.<sup>12</sup>

All relocation proposals must indicate the proposed new location for the building, why relocation is required, any risks to the structure, and what new use of land is proposed for the original site of the historic building.

A 'last resort' should be understood to mean that there is a genuine physical threat to the place; not that it is inconvenient for the current owner to retain it. Where this latter

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<sup>11</sup> The design of the new additions should consider the relationship between openings such as windows, doors and solid walls and the continuation of horizontals such as string courses and plinths. The design should pick up on shapes, mass, scale, heights above the ground of cornices, key mouldings, materials, colours and other details.

<sup>12</sup> Adapted from the NZ ICOMOS Charter

argument is being proposed, discussions should focus around retaining the place and adaptively reusing it.

With regard to the relocation of any pre-1900 building, the archaeological authority process under the Historic Places Act 1993 may be relevant.

A conservation plan, prepared by a heritage professional, should inform and guide any proposal that involves relocation.

Any building that will be removed should be fully recorded and documented both prior to, and during the removal process.<sup>13</sup>

### **Checklist for assessing proposed relocation of buildings**

- Relocation should be discouraged except in circumstances where: the existing site or setting is not of significant heritage value; relocation is required to save the building as a last resort; and continuity of heritage value cannot otherwise occur. The following other matters may also be relevant:
  - Any genuine threats to the building that precludes retention in its current location should be considered and documented (e.g. severe erosion or landslip, inundation by dam construction etc).
  - The proposed relocation should allow an understanding of the remaining significance of the building (e.g. ensuring the new site allows similar views from the street and setting or that a corner building is relocated to a new corner site).
  - Future preservation of the building will be provided through a compatible use, improved physical condition, appropriate context or surroundings, and protection from vandalism and fire.
  - Where a building was designed to be relocatable or relocation has been a feature of its history, relocation may, in some circumstances be appropriate. However a full assessment of the potential effects of relocation should nevertheless be carried out.
  - Relocation should be informed by the concept of greater or total conservation benefit with respect to a large complex group of structures and buildings. It may be that the removal of minor structures may be justified to achieve the conservation of most significant places on the entire site. All other avenues should be explored before this option is considered (e.g. funding sources) and all decisions must be informed by a conservation plan.

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<sup>13</sup> NZHPT, *Guidelines for the Investigation and Recording of Buildings and Standing Structures*, Archaeological Guidelines Series No.1, 2 June 2006: [http://www.historic.org.nz/heritage/archsites\\_intro.html](http://www.historic.org.nz/heritage/archsites_intro.html)

If relocation is to be supported by NZHPT, the proposal should involve proposals to mitigate or remedy the adverse effects of relocation including provisions to protect to the building or structure by means of a heritage covenant.<sup>14</sup>

## Partial Demolition of Historic Buildings

### Principles

Best practice conservation principles require the retention of significant heritage buildings and structures in their entirety, including significant external fittings, artwork, interiors, curtilage and associated heritage objects.

Conservation practice acknowledges that later additions to an original building may have acquired significance in their own right.

The partial demolition or removal of significant heritage fabric, including façade retention proposals, is not consistent with best practice conservation principles.

With regard to the partial demolition of any pre-1900 building, the archaeological authority process under the Historic Places Act 1993 may be relevant.

A conservation plan, prepared by a heritage professional, should inform and guide any proposal that involves partial demolition.

Any part of a building or structure that will be demolished should be fully recorded and documented both prior to, and during the partial demolition process.<sup>15</sup>

### Checklist for assessing the proposed partial demolition of buildings

- Partial demolition should not be allowed unless it does not adversely affect the significance and integrity of the place.
- The proposed partial demolition should be limited to parts of the building (including interior) that have been identified in a conservation plan or heritage assessment as having no significance, are not contributory to the significance of the heritage place, are intrusive, or where the partial demolition reveals fabric of higher degree of significance.
- The proposed partial demolition should be limited to parts of the building that are beyond physical repair due to fire or other damage.

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<sup>14</sup> Adapted from NZHPT Registration Policy, Relocation of Buildings and Structures, June 1997

<sup>15</sup> NZHPT, *Guidelines for the Investigation and Recording of Buildings and Standing Structures*, Archaeological Guidelines Series No.1, 2 June 2006: [http://www.historic.org.nz/heritage/archsites\\_intro.html](http://www.historic.org.nz/heritage/archsites_intro.html)

- Partial demolition should be informed by the concept of greater or total conservation benefit with respect to a large complex group of structures and buildings. It may be that the removal of minor parts of a building may be justified to achieve the conservation of most significant places on the entire site. All other avenues should be explored before this option is considered (e.g. funding sources) and all decisions must be informed by a conservation plan.

**Checklist for Façade Retention of Buildings (if partial demolition of the rear of the building has been allowed or has occurred)**

- The new structure (behind the façade if partial demolition has occurred) should not be visible when viewed from principal viewing points identified in an urban design or heritage assessment.
- Where a façade is to be retained it should include at least one room-depth of the original structure to permit an understanding of the relationship between the original exterior and the interior functions.
- The design of the retained façade should retain the original shape, pitch, covering material and decoration of the roof.
- The retained façade should be subject to active repair and maintenance, retaining original elements and detailing.
- Where modifications to the ground floor frontage of the façade are essential to accommodate a new use, the design should harmonise with the rest of the elevation, reflecting in particular the design of any original fenestration. Modifications to the facade above ground floor level should be avoided.
- The floor levels in the new structure should match existing floor levels. Where this is impracticable care should be taken to ensure floors and/or suspended ceilings do not run horizontally across window openings on the retained facade.
- Any façade retention proposal should ensure that window spaces open into interior spaces. Views to the exterior of the new building or the sky should be avoided.
- The scale and dimensions of the interior spaces immediately behind the facade should be the original interiors, fully restored. Where this is not possible, care should be taken to ensure that interior dimensions and lighting visible from the street is of a compatible scale and form.<sup>16</sup>

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<sup>16</sup> The above standards are adapted from NZHPT Policy Statement – The Retention of the Facades of Historic Buildings, October 1997

## **Demolition of Historic Buildings**

### **Principles**

Demolition of a heritage place destroys its significance and removes the opportunity for future generations to understand the place and its values. Demolition can sometimes be a short-term 'convenient solution' that is subsequently regretted.

Demolition is also inconsistent with sustainable management of resources in that it removes the stored energy in the building and creates solid fill, contributing to waste disposal issues that may already be problematic.

The NZHPT encourages the retention of significant heritage buildings including significant external fittings, artwork, interiors, curtilage and associated heritage objects.

The NZHPT is opposed to the demolition or removal of historic buildings, except where the place is beyond repair. There are certain, very rare circumstances where demolition of a portion of a historic place might be permitted, but only where it is imperative for the survival and reuse of the greater portion of the site.

All buildings of heritage significance should be protected from demolition and alternatives to demolition should be encouraged including new and compatible uses, repair and maintenance works, maintenance plans, and appropriate alterations and changes.

Demolition proposals should be informed by expert professional evidence, especially an engineering report prepared by a specialist heritage engineering professional and an economic feasibility and options report.

With regard to the demolition of any pre-1900 building, the archaeological authority process under the Historic Places Act 1993 may be relevant.

Any building or structure that will be demolished should be fully recorded and documented both prior to, and during the demolition process.<sup>17</sup>

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<sup>17</sup> NZHPT, *Guidelines for the Investigation and Recording of Buildings and Standing Structures*, Archaeological Guidelines Series No.1, 2 June 2006: [http://www.historic.org.nz/heritage/archsites\\_intro.html](http://www.historic.org.nz/heritage/archsites_intro.html)



### **Checklist for assessing demolition proposals**

- Demolition of historic buildings should not be allowed unless in very rare circumstances, in relation to the following matters:
  - With regard to a large or complex site, the proposed demolition will not compromise the integrity and significance of the place, streetscape, area or landscape.
  - Demolition may be acceptable when a building or structure is considered to be 'beyond repair'. It may be structurally unsafe, may have been damaged by natural event, or may have been irreversibly damaged by fire. This matter often requires evidence from a professional engineering assessment.
  - Demolition should be informed by the concept of greater or total conservation benefit with respect to a large complex group of structures and buildings. It may be that the demolition of minor parts of a building may be justified to achieve the conservation of most significant places on the entire site. All other avenues should be explored before this option is considered (e.g. funding sources) and all decisions must be informed by a conservation plan.
  - All alternatives to demolition should be explored including new and compatible uses, repair and maintenance works, maintenance plans, and appropriate alterations and changes.

# **Assessing Impacts on the Surroundings associated with Historic Heritage**

## **Principles**

The surroundings associated with historic heritage involve an area of land (or land covered with water), surrounding a historic place, site or area of heritage significance which is essential for retaining and interpreting its heritage significance. It can apply to either land which is integral to the heritage significance of items or a precinct which includes buildings, structures, archaeological sites, trees, and places/areas of significance to Maori including wahi tapu.<sup>18</sup>

Research is necessary to identify surroundings. The research should examine historic land subdivision patterns, archaeological features, visual, physical, historical and functional links with important features in the area, and the setting, views and landmark qualities.<sup>19</sup>

Assessing the significance and impacts on surroundings will require an understanding of the significance of the original relationship of the heritage item to its site and locality, adequacy of setting, visual catchments and corridors, and the need for buffer areas to screen unsympathetic development.<sup>20</sup>

New buildings and additions (to existing non-heritage buildings) should be managed so they do not affect the significance of the character and setting of existing historic buildings and the area. Generally, new buildings and additions should be designed to be sympathetic to the overall existing character of historic buildings. It is important that new buildings do not dominate or adversely affect important visual settings.

The design approach to new buildings near or adjacent to existing historic buildings should achieve compatibility. The height and proportion should reflect the predominant height and proportions of the adjacent buildings in the area. The height, location (including any setbacks) and proportion of the building should be carefully assessed and managed.

The architectural style of new buildings and additions should be compatible with the historic design of existing buildings. The style should not imitate, replicate or mimic the surrounding historical styles and it should not be too grand.

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<sup>18</sup> Adapted from definition of heritage curtilage provided in: Heritage Office, *Heritage Curtilages*, Department of Urban Affairs and Planning, 1996, p 3. For a discussion on surroundings, see *Oriental Parade (Clyde Quay) Planning Society v Wellington City Council*, W 63/2005, EC and *Canterbury Museum Trust Board v Christchurch City Council*, C59/2006, EC.

<sup>19</sup> Heritage Office, *Heritage Curtilages*, Department of Urban Affairs and Planning, 1996, p 9

<sup>20</sup> *ibid*, p 10

## **General**

- The proposed activity should avoid affecting a place of significance to Maori as stated by tangata whenua. There should be a buffer area between the activity and the place of significance to Maori.
- The original relationship of the heritage item to its site and locality should be retained. All the main structures associated with the heritage item (for example, homestead, garden, stables, etc) should be retained in single ownership.
- Where a historic place has landmark values, the proposed activity should not be visually dominating or distract from the landmark qualities of the historic place. The relative scale of the activity is an important consideration.
- The proposed activity should provide for an adequate setting for the heritage item, enabling its heritage significance to be maintained. The significance and integrity of the setting should be identified. Well preserved, authentic, essential and substantial settings should be retained and protected.
- Effects which are permanent and irreversible should be assigned greater weighting than relatively temporary or reversible changes to the setting of the heritage item.
- The proposed activity should provide for adequate visual catchments, vistas and sight-lines or corridors to the heritage item from major viewing points and from the item to outside elements with which it has important visual or functional relationships.
- The proposed activity should provide for any intervisibility values in situations when historic items were intended to be seen from other historic items (for example, views from a marae to a pa site).
- If relevant, the proposed subdivision should incorporate buffer areas to screen the heritage item from visually unsympathetic development or to provide protection from vibration, traffic, movement, noise, pollution, or vandalism.
- The proposed activity should adopt appropriate consent conditions and provisions to protect historic heritage by means of a heritage covenant, reserve, or conservation lot.

**Checklist for assessing proposed new buildings (including any new addition to an existing non-heritage buildings) adjacent to existing historic buildings**

- Any new building or addition should not affect the character and setting of the historic building.
- Any new building or addition should be sympathetic to the overall existing character of the historic building.
- Any new building or addition should be located to avoid damage to historic and archaeological sites.
- The height, location (including any setback) and proportion of any new building or addition should be compatible with the existing historic environment. The height and proportion reflect the predominant height and proportions of the adjacent building(s) and the area.
- The size, orientation, scale, massing, density, modulation, and shape of the new building or addition should be compatible with the existing historic building(s). These elements should relate to surrounding buildings. New buildings or additions should not dominate an area.
- Any new building or addition should not result in any significant visual effects, including close and distant views.
- The architectural style of any new building or addition should be compatible with the historic design of existing buildings.<sup>21</sup> The style should not imitate, replicate or mimic the surrounding historical styles and it should not be too grand, iconic, or extreme.
- Any new building or addition should adopt materials and colours that relate to and use as reference points, the materials, colour and details of adjacent buildings and the surrounding areas. New materials should be used providing they are sympathetic to the existing character of the area.
- Associated activities affecting the existing historic character of the place, including signage, outbuildings, landscaping and car parking, should have a minimal effect.

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<sup>21</sup> New work is made compatible with the original by maintaining proportions, scale, materials, textures and colours, but varying the design in subtle ways. Chris Cochran, *Guidelines for Altering Heritage Buildings*, NZHPT, 2000, p

# **Assessing Impacts on Historic Areas**

## **Principles**

Historic areas may include registered historic areas, conservation areas and character areas and precincts.

In the urban setting, historic areas may involve significant townscapes and streetscapes. Change in these areas and landscapes needs to be carefully managed to preserve heritage values. Demolition, relocation, poorly designed new buildings or inappropriate additions can undermine the collective integrity of historic areas.

The construction of new buildings can compromise historic areas. New buildings should be designed in a manner that is sympathetic to the significance and character of the area.

In the rural setting, historic areas may include complex archaeological and cultural sites and historic landscapes associated with extractive industries (i.e. goldmining), pastoral farming, and nature conservation. Rural historic areas are threatened by a range of land use changes in the environment. Transport and land use planning needs careful consideration with protection offered by protective zones and overlays.

Proactive planning for historic areas will require the use of management plans, structure plans and master plans to guide future development and the formulation of any required plan changes.

The significance of the historic area requires adequate research, documentation and explanation. Appropriately skilled professionals such as landscape architects should be engaged to provide expert advice. Any non-contributory buildings that are of minimal heritage value or are invasive should be identified.

The archaeological authority provisions of the Historic Places Act 1993 may be relevant with regard to any earthworks in a historic area.

Maori heritage values associated with any historic area require special consideration. The documentation of these values may require a cultural heritage impact assessment.

The standards for buildings and structures relating to repair and maintenance, alterations and additions, relocation, partial demolition, demolition and subdivision outlined in this discussion paper may be relevant considerations for assessing changes to a historic area.

### **Checklist for assessing proposed changes to a historic area**

- The proposed activity should be located to avoid any damage to places of significance to Maori, historic sites or archaeological sites.
- The proposed activity should not affect the heritage significance, integrity and condition of the historic area including any significant components or building fabric of heritage value.
- The proposed activity should not affect a building, area, or item that makes a contribution towards the significance of the street, area or landscape.
- The proposed activity should be limited to affecting a building which has been identified as a non-contributory item or is intrusive within a historic area. Any demolition or removal should not create a vacant site and should be associated with the planning of a replacement structure.

### ***New Buildings***

[see above assessment criteria relating to surroundings associated with historic heritage]

### ***Rural Subdivision***

- The proposed subdivision should retain or reinforce the existing and dominant historic property boundaries in terms of size and location.
- The proposed subdivision should retain or reinforce the existing consistent rhythm and pattern of buildings, items, and areas.
- The proposed subdivision should respect the historical layout and character of the area in terms of building envelopes, frontages, building sites, roading, materials and colours.
- The proposed subdivision should have positive heritage outcomes, including the protection and conservation of historic places and areas, and the adoption of covenants and management plans.

# **Assessing Impacts on Places and Areas of Significance to Maori**

## **Principles**

The protection of places and areas of significance to Maori, including wahi tapu, is a matter of national importance. The principles of the Treaty of Waitangi will be relevant with regard to sites of significance to Maori and wahi tapu.

The protection and physical conservation of places and areas of significance to Maori, including wahi tapu, is paramount.

Wherever possible, the destruction, damage or modification of places and areas of significance to Maori and wahi tapu places or areas should be discouraged and avoided.

If the site is also an archaeological site, integration with archaeological authority processes under the Historic Places Act 1993 is an important consideration when assessing effects involving places and areas of significance to Maori under the RMA. The applicant should be informed at any early stage, that an authority from the NZHPT may be required.

If the site is registered as a wahi tapu area, the consultation procedure under section 33A of the Historic Places Act 1993 is relevant.

## **Maintenance of places and areas of significance to Maori and historic sites**

Ongoing maintenance of places and areas of significance to Maori and historic sites should be encouraged. This will involve activities such as weed control, cutting grass and light stocking (in a rural area). Cultivation, fencing, upgrading of buildings and paved roads and other works should not involve land disturbance that results in damage. In relation to a place or area of significance to Maori, the work should be mandated by the written approval of tangata whenua. Maintenance of an archaeological site may require an archaeological authority under the Historic Places Act 1993.

Repair work to places and areas of significance to Maori and historic sites requires careful assessment and management. For example repairs to an urupa (grave site) requires a higher level of control and planning than just cutting the grass. Generally, repair work should be treated in a similar manner to land disturbance and resource consent should be required.

**Checklist for assessing appropriate maintenance work to places and areas of significance to Maori [this checklist can also apply to historic sites, including archaeological sites].**

- The proposed maintenance work should be designed in partnership and consultation with the tangata whenua and the proposed maintenance work is supported by the written approval of the relevant tangata whenua.
- The work will not involve any land disturbance or repair works.
- The work involves keeping the place in good condition by controlling noxious weeds, cutting grass and light stock grazing.
- The work is an existing land use that does not involve any land disturbance or destruction to a site, place or area.
- Any disturbance of land by cultivation that does not extend beyond the area or depth previously disturbed.
- The work involves maintenance and minor upgrading of existing buildings that compatible with standards for repair and maintenance of historic places, buildings, listed above.
- The work involves maintenance and upgrading of paved roads, modified berms and paths provided that the land disturbance does not extend beyond the area or depth previously disturbed.
- Any disturbance of the land by fencing that does not extend beyond the area or depth previously disturbed.
- The work involves preservation and conservation as defined in the ICOMOS NZ Charter.
- The work, if relevant, is authorised by an archaeological authority issued under the Historic Places Act 1993.



### **Checklist for assessing potential for damage to places and areas of significance to Maori**

- The proposed activity should be designed in partnership and consultation with the tangata whenua.
- The proposed activity should be designed to avoid all known places and areas of significance to Maori where possible by encouraging consideration of alternative development locations and including the provision of protective buffer areas.
- The proposed activity should comply with any relevant comment or recommendation provided to the local authority by the Maori Heritage Council under sections 32D and 33 of the Historic Places Act 1993.
- The proposed activity should not damage an archaeological site or place or area of significance to Maori or their context in a wider historic landscape.
- The proposed activity should be subject to a Maori values assessment or cultural heritage impact assessment.
- If relevant, the proposed activity must be authorised by an archaeological authority issued by the NZHPT under the Historic Places Act 1993. An archaeological assessment must be prepared according to the NZHPT's guidelines.<sup>22</sup>
- The proposed activity should mitigate or remedy any damage to any significant sites that have been damaged from past earthworks, construction of structures and buildings or natural erosion.
- The proposed activity should achieve positive heritage outcomes and provisions including the use of a covenant to protect significant places and areas.

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<sup>22</sup> NZHPT, *Guidelines for Writing Archaeological Assessments*, Archaeological Guidelines Series No.2, 2 June 2006: [http://www.historic.org.nz/heritage/archsites\\_intro.html](http://www.historic.org.nz/heritage/archsites_intro.html)

## **Assessing Impacts on Historic Sites, including Archaeological Sites**

Note: These standards apply to the RMA process and they do not relate to the archaeological authority procedures under the Historic Places Act 1993.

### **Principles**

Historic sites are historic places that generally do not include buildings. They often mark an important event or person. They can include heritage trees, gardens, memorials, battle sites, or landing sites.

Wherever possible, the destruction, damage or modification of historic and archaeological sites should be avoided or minimised. In the context of the RMA, this may include places of archaeological significance that post-date 1900.

In the case of rural subdivision that may affect historic and archaeological sites, development needs to be planned to avoid sites with the location of any earthworks (driveways, services, fencing, building platforms, etc) determined at an early planning stage. The future physical management of archaeological sites is an important consideration of any subdivision proposal.

Avoiding effects on historic and archaeological sites will also be an important issue with regard to development within historic town centres, historic urban precincts, forestry development, and mining.

Obtaining professional archaeological advice is an important first step for any proposal that may affect archaeological sites.

Integration with archaeological authority processes under the Historic Places Act 1993 is essential and advice should be sought from the regional NZHPT archaeologist.

The applicant should be informed, as soon as possible if, on the basis of an archaeological assessment, an archaeological authority from the NZHPT is required.

The principles of the Treaty of Waitangi will be relevant where an historic or archaeological site is associated with Maori historical occupation and use.

Where an historic or archaeological site will be lost as a consequence of the development activity, the values of the site should be fully documented and investigated by a professionally qualified archaeologist.

The management of all large and complex historic and archaeological sites should be guided by a conservation plan prepared by a heritage professional. A conservation plan should guide the active management of the site and matters such as the control of vegetation, stock, soil erosion, vandalism, and public access and interpretation.

[See Assessing impacts on places and areas of significance to Maori for a checklist in relation to maintenance of places/areas of significance to Maori].

### **Checklist for assessing resource consent applications that have the potential to damage historic and archaeological sites**

- The proposed activity should be designed and located in an area so as to avoid all known historic and archaeological sites. This can be achieved by encouraging the consideration of alternative development options and provision of protective buffer areas.
- The proposed activity should avoid affecting a place or area of significance to Maori as stated by tangata whenua.
- In relation to an archaeological site, the proposed activity or site should be the subject of an archaeological assessment prepared by a professional archaeologist according to the NZHPT's guidelines.<sup>23</sup>
- In relation to a historic site that is not an archaeological site, the proposed activity should be subject to a heritage impact assessment.
- The concept of the greater or total conservation benefit of a proposal applies with regards to complex historic or archaeological landscapes. The loss of some minor parts may be justified for the place to continue to function or to accommodate a proposal which achieves the conservation of the greater portion of the complex as informed by a conservation plan.
- The proposed activity should achieve positive heritage outcomes by the provision for ongoing physical management including the use of a covenant. Historic and archaeological sites should not be abandoned but benefit from active management such as control of stock, vegetation, and soil erosion as guided by expert advice and a conservation plan.
- The proposed activity should remedy or mitigate any damage to an historic or archaeological site that has been partially destroyed as a result of damage from past earthworks, construction of structures and buildings or natural erosion.
- Any historic markers or plaques at historic sites should be retained and upgraded. Public access and interpretation should be provided as appropriate. The site should be protected from vandalism.
- Any heritage trees or other vegetation should be preserved on the basis of advice provided by a professional arboriculturalist.

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<sup>23</sup> NZHPT, *Guidelines for Writing Archaeological Assessments*, Archaeological Guidelines Series No.2, 2 June 2006: [http://www.historic.org.nz/heritage/archsites\\_intro.html](http://www.historic.org.nz/heritage/archsites_intro.html)

- For archaeological sites dating before 1900, the proposed activity must be authorised by an archaeological authority issued by the NZHPT under the Historic Places Act 1993.

## **Assessing Impacts of Subdivision on Historic Heritage**

### **Principles**

Subdivision is a land use and often results in major land use changes. It must be carefully managed and should not compromise the condition or integrity of historic heritage values.

Subdivision should be designed to protect any historic place, historic area, historic and archaeological site, and place and area of significance to Maori. In addition, subdivision should be designed to protect the setting or curtilage of historic heritage.

In the case of rural subdivision that may affect historic heritage, development needs to be planned to avoid sites, with the location of any earthworks (driveways, services, fencing, building platforms, etc) determined at an early planning stage. The future physical management of archaeological sites is an important consideration of any subdivision proposal.

Obtaining professional heritage advice is an important first step for any subdivision proposal that may affect historic heritage. In relation to archaeological sites, the advice of a professional archaeologist should be engaged.

Integration with archaeological authority processes under the Historic Places Act 1993 is essential and advice should be sought from the regional NZHPT archaeologist.

The applicant should be informed, as soon as possible if, on the basis of an archaeological assessment, an archaeological authority from the NZHPT is required.

The principles of the Treaty of Waitangi will be relevant where an historic or archaeological site is associated with Maori historical occupation and use.

Subdivision that results in positive outcomes for historic heritage should be encouraged. A conservation plan should guide the future active management of historic heritage and matters such as the control of vegetation, stock, soil erosion, vandalism, and public access and interpretation.

### **Checklist for assessing subdivision proposals.**

- The proposed subdivision should avoid affecting a place or area of significance to Maori as stated by tangata whenua.
- The original relationship of the heritage item to its site and locality should be retained. All the main structures associated with the heritage item (for example, homestead, garden, stables, etc) should be retained in single ownership.

- The proposed subdivision should provide for an adequate setting for the heritage item, enabling its heritage significance to be maintained.
- The proposed subdivision should provide for adequate visual catchments or corridors to the heritage item from major viewing points and from the item to outside elements with which it has important visual or functional relationships.
- If relevant, the proposed subdivision should incorporate buffer areas to screen the heritage item from visually unsympathetic development or to provide protection from vibration, traffic, noise, pollution, or vandalism.
- The proposed subdivision proposals should adopt appropriate consent conditions and provisions to protect historic heritage by means of a heritage covenant, reserve, or conservation lot.

Note: the principles and standards for surroundings associated with historic heritage as outlined in this discussion paper may also be relevant to subdivision.

# **Assessing Impacts of Advertising Signs on Historic Heritage**

## **Principles**

For many commercial buildings, advertising signs are often essential for the continued economic viability and occupation of the building.

The NZHPT promotes high quality advertising signage that does not compromise the integrity of any historic place and area, including its surroundings.

## **Checklist for assessing signage proposals:**

- The proposed sign should acknowledge and respect the character of the façade.
- The proposed sign should follow historically documented precedents for the locality both in style and in proportion. They should be located in places that would traditionally been used as advertising areas.
- The proposed sign should be appropriate in terms of size and location. Generally they should be discreet and should not cover or obscure any significant views, areas, and heritage features, including shop fronts, verandas and balustrades. They should not necessitate the removal of decorative features or detailing.
- The proposed sign should use appropriate methods of attachment. They should not cause irreversible damage to the original fabric.

## **Other matters that may be relevant:**

- The location of side-wall signs should be carefully considered. They should not dominate the wall or detract from the historic significance of the place.
- Corporate or standardised trademark advertising should be adapted to suit the individual location and building. The branding of buildings in corporate colours by painting should be discouraged and avoided.
- Illuminated signs should be carefully considered. If signs are to be lit, they should preferably be illuminated by external lighting.
- Signs should be limited in number so to avoid unduly visual cluttering effects.

# **Assessing Impacts of Designations on Historic Heritage**

## **Principles**

Designations of land should not provide for any public work, project or other work that compromises the protection, condition, integrity, or public appreciation of historic heritage.

Requiring authorities should be encouraged to seek essential designations outside of, and sufficiently distant from, sensitive historic heritage areas.

Where land must be designated over, or near, historic heritage; particular attention should be paid to the extent of the area involved, the specific location, and the nature of activity involved, so that adverse impacts on historic heritage are minimised to the greatest practical extent. This will require a heritage impact assessment (and normally an archaeological assessment).

All pre-1900 archaeological sites remain protected in designated land and an authority from the NZHPT is required to destroy, damage or modify any archaeological site under the Historic Places Act 1993.

## **Checklist for assessing proposed designations**

- Alternative locations for designations should be explored. Requiring authorities need to seek locations for essential designations outside of, and sufficiently distant from land associated with historic heritage sites or areas.
- Planning for designations must be informed by adequate research and assessment, including a heritage impact assessment and archaeological assessment.
- Where land must be designated over, or near, historic heritage, particular attention should be paid to the extent of the area involved, the specific location, and the nature of activity involved, so that adverse impacts on historic heritage are minimised to the greatest practical extent.
- Outline plans should be prepared in relation to designations to provide for historic heritage values where appropriate. Outline plans should be informed by professional research and assessment and cover matters such as:
  - Height, shape and bulk of the public work, project or work.
  - Location on site of the public work, project or work.
  - Likely finished contour of the site.
  - Vehicular access, circulation and provision for parking.
  - Landscaping proposed.

- Any other initiatives (e.g. painting) to avoid, remedy or mitigate any adverse effects on historic heritage.
- Requiring authorities should be encouraged to surrender designations over and remove facilities from land no longer required for the public work, project or other work.



## Further information and guidance

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Building Conservation Website (includes a large number of articles on a range of conservation topics):

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There are numerous other maintenance guidelines available from overseas heritage agencies. For example, Heritage Victoria, Technical Guidelines Series:

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### **Partial Demolition**

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