

Ballarat Botanical Gardens Conservation Management Plan

Acknowledgement of Country:

The City of Ballarat acknowledges the Traditional Custodians of the land we live and work on, the Wadawurrung and Dja Dja Wurrung People, and recognises their continuing connection to the land and waterways. We pay our respects to their Elders past, present and emerging and extend this to all Aboriginal and Torres Strait Islander People.

TABLE OF CONTENTS

1	Purpose	2
2	Background	2
3	Strategic Context	2
3.1	Council plan objectives 2021-2025	2
3.2	Historic Urban Landscape (HUL) methodology	3
4	Study Area	3
5	Objectives	4
6	Requirements.....	4
7	Project Scope and Methodology	5
7.1	Historic Urban Landscape (HUL) Approach	8
7.2	Community Consultation	8
7.3	Council support / collaborative elements	8
8	Project Timeframe and Budget.....	8
9	Project Management	9
10	Submission Requirements	9
10.1	Selection Criteria.....	9
10.2	Schedule of Fees	10
11	Relevant studies and reports	11
12	Due diligence, risk and quality management	11
13	Format of materials	12
14	Variations and future work.....	122
15	Conflicts of interest.....	122

PART A: THE PROJECT BRIEF

1 Purpose

The City of Ballarat is seeking suitably qualified Consultants to undertake a Conservation Management Plan for the Ballarat Botanical Gardens. The Conservation Management Plan will build on and review previous Conservation Analysis and policy work undertaken in the mid-1990s.

The purpose of the Conservation Management Plan (CMP) will be to enable the City of Ballarat to better understand the significance of the Ballarat Botanical Gardens so as to best manage its heritage values, and provide specific advice on potential future use, change and development of the place.

2 Background

The Ballarat Botanical Gardens (the Gardens) occupies a 40 Hectare site on the edge of Lake Wendouree and Gillies Street in Ballarat and is considered to be one of Australia's premier cool climate gardens. Established in 1858, the Ballarat Botanical Gardens are one of the best examples of a heritage botanic garden in Victoria and is included on the Victorian Heritage Register (H2252).

The Gardens retains typical gardenesque and botanical gardens characteristics, including open lawn areas planted with mature specimen trees, areas of intensive horticultural interest, formal avenues, horticultural buildings such as a fernery and conservatory, fountains, statuary and is located in close proximity to a township developed during the mid-nineteenth century.

A document entitled 'Ballarat Botanical Gardens: Conservation Analysis and Policy' was prepared by John Patrick Pty. Ltd. in association with Allom Lovell and Associates Pty. Ltd. in 1994, and the 'Ballarat Botanical Gardens Master Plan and Management Strategy' was prepared the following year (1995) by John Patrick. There have been significant changes and development across the Gardens since the Conservation Analysis and Master Plan were prepared in the mid-1990s, and the manner in which Conservation Management Plans are undertaken has also changed.

The pending 2023 Ballarat Botanical Gardens Master Plan has created the need for a concise and fully updated CMP to appropriately guide the conservation and management of the Ballarat Botanical Gardens, and guide the Master Plan.

3 Strategic Context

3.1 Council plan objectives 2021-2025

- **Goal 3: A city that fosters sustainable growth**
 - Strategic Objective 3.7 – Create great precincts and places for people
- **Goal 4: A city that conserves and enhances our natural and built assets**
 - Strategic Objective 4.3 – Respect conserve and celebrate our rich history
 - Strategic Objective 4.4 - Improve, maintain, and conserve open space & natural assets

3.2 Historic Urban Landscape (HUL) methodology

The City of Ballarat is committed to the United Nations Educational, Scientific and Cultural Organisation's (UNESCO) approach to managing change in urban areas, known as Historic Urban Landscape or HUL) in alignment with Initiative 5.1 of the Ballarat Strategy:

'Implement UNESCO's Historic Urban Landscape approach as the guiding framework for managing change in a dynamic city'.

The HUL Approach

The historic urban landscape approach sees and interprets the city as a continuum in time and space. Countless population groups have left their mark, and continue to do so today.

4 Study Area

The study area includes the entirety of the land included on the Victorian Heritage Register as H2252 Ballarat Botanical Gardens as shown in figure 1.

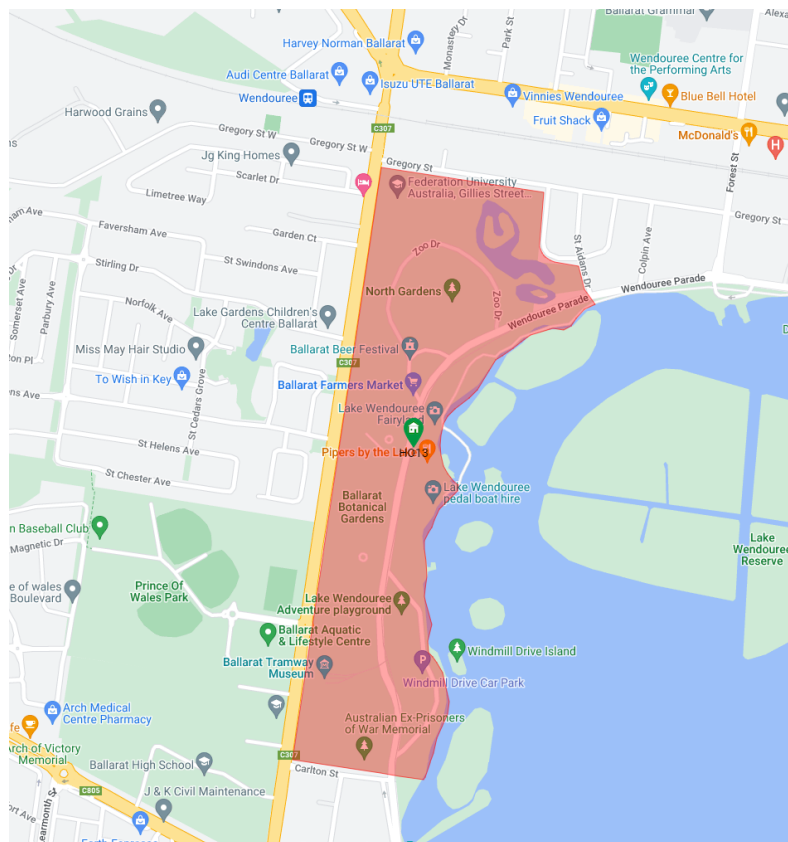


Figure 1 Extent of Registered Land H2252 Ballarat Botanic Gardens

5 Objectives

The objectives of the Conservation Management Plan are to:

- Review and update the existing CMP
- Adopt a consultative approach which engages Stakeholders in the process
- Provide a detailed consideration of the significance of the Gardens and its various elements
- Provide comprehensive guidance on how the Ballarat Botanical Gardens should be managed in order to protect its heritage values through conservation policy and action
- Preliminary Landowner Consultation

6 Requirements

The CMP is to be prepared in accordance with the principles and processes defined in The Burra Charter Burra Charter (2013) and associated guidelines.

The CMP will be prepared in five stages:

1. Understand the place
2. Assess significance
3. Identify issues
4. Develop conservation policies
5. Develop an action plan.

The consultant is required to provide a draft report documenting each stage for review by City of Ballarat before proceeding to the next stage. The final CMP will be a fully integrated compilation of these stage reports. The CMP will also be expected to include detailed plans, maps and images as required.

The consultant team will require members with skills and experience in a wide range of areas, including history, conservation, architecture/landscape architecture and horticulture.

7 Project Scope and Methodology

The City of Ballarat requires submissions from suitably qualified and experienced individuals or organisations to develop a Conservation Management Plan based on a comprehensive review of existing documentation, and a fully revised and updated assessment of the Ballarat Botanical Gardens. The CMP will provide guidance for the ongoing conservation and management of the Ballarat Botanical Gardens.

The methodology for the preparation of the CMP should generally adhere to the Heritage Council of Victoria document 'Managing Heritage Places: Conservation Management Plans' (2010) https://www.heritage.vic.gov.au/_data/assets/pdf_file/0022/514273/Conservation-Management-Plans-Managing-Heritage-Places.pdf) and follow the guidance of the Burra Charter (2013) <https://australia.icomos.org/wp-content/uploads/The-Burra-Charter-2013-Adopted-31.10.2013.pdf>).

The fee submission should provide a fully costed and detailed fee proposal which sets out the proposed methodology and adheres to the staged approach set out below. The stages proposed are:

Inception

Undertake inception meeting, prepare detailed project plan with milestones and stakeholder engagement plan. Ensure that the project objectives and methodology are clear and agreed to, and access resources etc. Demonstrate an understanding and application of the Historic Urban Landscape approach in the project methodology.

Deliverables:

- *Meet with Project Manager and Project Control Group (PCG) to confirm scope, outputs and exchange information*
- *Prepare a detailed project plan for approval by PCG with milestones associated with deliverables.*
- *Prepare Engagement Plan for approval by PCG.*

Stage One – Understand the Place

This stage should involve a full review and assessment of the 1994 Conservation Analysis and Policy document, the 1995 Master Plan for the site, the 2014 Visionary Plan for the Ballarat Botanical Gardens, the 2018 Botanical Living Collection of Ballarat, the 2019 North Gardens Sculpture Park Landscape Master Plan and the 2017 Lake Wendouree Master Plan

It will include the Introduction to the whole report, a revised draft history for the place which draws on existing sources and new research as required. In addition, it will set out the ownership and management responsibilities for the place, the statutory listings and relevant legislation which apply to the place and a broad physical description of the place and its components. It is expected that preliminary engagement with stakeholders and Traditional Owners will occur in Stage 1 to inform the understanding of the multiple layers of meaning and history associated with the site.

In addition, a draft copy of the broad categories of components which contribute to the significance of the place (i.e: Living Collection, Built Structures, Path Network etc.) and any sub-categories which should be considered for assessment in Stage 2 will be submitted for approval.

Deliverables:

- *Draft Stage 1 report, including:*
 - *Introductory material including ownership, statutory listings, legislative requirements etc.*
 - *Revised draft history for the Ballarat Botanical Gardens*
- *Draft list of broad categories and sub-categories of components to consider in Stage 2*
- *Preliminary engagement with stakeholders*
- *Meeting with PCG to discuss findings of Stage 1*

Stage Two – Assess Significance

Review and re-assess the significance of the various elements of the Gardens, based on the categories and sub-categories identified in Stage 1. Each element of the place should be attributed a (defined) grading of relative significance (i.e: Significant, Contributory, Not Significant). This information can be presented graphically or in written form, or a combination of both (such as a 'datasheet' format).

A revised Statement of Significance for the whole of the Gardens should also be prepared for Stage 2. The Statement of Significance will be prepared according to 'Assessing the cultural heritage significance of places and objects for possible state heritage listing: The Victorian Heritage Register Criteria and Threshold Guidelines' (Revised 2020).

The assessment of relative significance for the various elements of the Gardens, as well as the revised Statement of Significance should include comparative analysis as relevant.

Deliverables:

- *Stage 2 of the report, including:*
 - *Identification of the elements of the place and their relative gradings*
 - *Revised Statement of Significance for the whole of the Ballarat Botanical Gardens*
- *Meeting with PCG Group*

Stage Three – Identify Issues

Identify all known issues, threats, operational and legal requirements and future circumstances. These may include conservation requirements, new development, changes of use, access requirements, OH&S requirements, hazardous materials, tree senescence, water management and species selection in a changing climate, risk from natural events, resource availability, site security, interpretation or other.

Deliverables:

- *Stage 3 of the report*
- *Further stakeholder engagement*
- *Meeting with PCG Group*

Stage Four – Develop Conservation Policies

Develop policies which support the retention of the significance of the place into the future. The conservation policies should respond to the significance of the place and specific issues identified in Stage 3. The policy will inform the broad vision and intent of the upcoming Master Plan, and will assist with specific decision making around the Gardens program of asset renewals/development.

Policies must be clear, reasonable and justified, and address the wider legislative and planning framework that applies to the Gardens. The policies should be set out as a series of aims or objectives followed by guidelines for their achievement.

Policy which addresses the following should be considered:

- *Maintenance of significant assets*
- *Repairs*
- *Use*
- *Involving stakeholders*
- *Interpretation*
- *Managing change*
- *Events*
- *Tree replacement*
- *Building works*
- *New structures*
- *New statutory / memorials*

Deliverables:

- *Stage 4 of report - Conservation Policy*
- *Stakeholder engagement*

Stage Five – Develop an Action Plan

The action plan will identify what, how and when actions will be undertaken to implement the conservation policies. The action plan should consider available resources and set the order of priorities in measurable timeframes.

Deliverables:

- *Draft Report*
- *Meeting with PCG Group to discuss feedback and potential changes*
- *Final Report with feedback incorporated*

7.1 Historic Urban Landscape (HUL) Approach

The City of Ballarat has signed up to an international pilot of a new way of looking at heritage and managing change in historic cities that is integrated and holistic; the Historic Urban Landscape (HUL). The pilot is being promoted and supported by the United Nations¹ to ensure that cities are sustainable into the future.

HUL is an integrated, interdisciplinary, whole-of-landscape approach to planning and management of the urban environment. The HUL approach aims at ensuring that the things that people value and that make Ballarat distinctive are at the heart of decision-making and are proactively used to attract investment and drive desirable future change.

As the methodology for applying HUL is currently being developed and refined, suggestions are welcome for how this may be achieved. Additional information is available here

https://www.hulballarat.org.au/cb_pages/toolkit_working_with_hul.php

7.2 Stakeholder Consultation

It is intended that the development of the Ballarat Botanical Gardens Conservation Management Plan will involve significant and comprehensive engagement processes, with consultation activities and opportunities for identified stakeholders to have input and review at each stage of the process.

7.3 Council support / collaborative elements

Council will provide support with the following:

- Historic Urban Landscape methodology planning workshop with the Project Control Group (may be coordinated with the inception meeting for the workshop), and additional HUL planning/review workshops as required
- Access to a desk
- Access to key internal stakeholders
- Venues for stakeholder engagement
- Coordination of the Project Control and Project Reference Groups (see Section 9 below)
- Access to background reports (see Part B for details)
- GIS data.

Consultants are required to specify any additional requirements from Council in their submission.

8 Project Timeframe and Budget

The project must be completed by 31 July 2023

The consultant is to submit a lump sum price with an itemised costing for the various components of the services. This may include options for provision of some elements to be negotiated and agreed by Council.

9 Project Management

Project Management will include the following:

Project Control Group

A small internal Project Control Group consisting of staff from relevant City of Ballarat departments will be established and led by the Project Manager. The Project Control Group will be responsible for undertaking internal review of all draft documents delivered by the Consultant and advising the consultants on project process and community/stakeholder engagement.

Members of the Project Control Group will also be available to provide technical advice to the Consultant as required.

Project Reference Group

A Project Reference Group will be established by the Project Manager and will include representatives from relevant Council Department and possibly some external agencies and statutory authorities – to be confirmed.

The Project Reference Group will be responsible for undertaking external review of all draft documents delivered by the Consultant and providing required expert technical advice to the Consultant.

Project Manager

The Project Manager will be responsible for all day-to-day communications and enquiries.

10 Submission Requirements

Submissions must address all components of this tender and include a detailed methodology explaining how the required outputs will be achieved.

Submissions must demonstrate an appreciation and understanding of the project objectives and the challenges facing local government, regional communities and the project region.

Submissions will be considered from prospective consultants who make alternative suggestions in their proposals, either in terms of the technical content of the work, or in terms of arrangements for consultancy.

Submissions must include:

- Proposed project methodology and schedule, including stakeholder engagement activities and processes
- Personnel and relevant experience
- Examples of relevant work
- Proposed roles and responsibilities of Council, the consultant and any proposed sub-consultants
- Project communication and management protocols
- If a consortium is proposed, examples of previous collaborative projects should be provided
- Proposed lump sum fee, including a breakdown of the proposed resource allocation for each stage/task and an indication of time commitment, rate and individual resource costs. Noting that optional elements will be considered, e.g. facilitation of the consultation process

- Any actual or potential conflicts of interest
- Any proposed variations from the brief must be clearly presented.

Submissions should be emailed to davidkeighrey@ballarat.vic.gov.au and must be received no later than 5.00pm on Friday 17 February 2023.

10.1 Selection Criteria

The successful consultant will be selected on the basis of the following criteria:

- Understanding of the project
- Comprehensive methodology which responds to the HUL approach
- Proven relevant experience and expertise, including regional urban renewal experience
- Team expertise – teams with commercial, implementation-based expertise will be viewed favourably
- Demonstrated ability to engage and work with stakeholders in a participatory manner
- Ability to undertake the work within a designated timeframe

10.2 Schedule of Fees

Stage / Task	Qty	Rate	Fee ex GST
Inception			
Stage One – Understand the Place			
Stage Two – Assess Significance			
Stage Three – Identify Issues			
Stage Four – Develop Conservation Policies			
Stage Five – Develop an Action Plan			
Additional Services Contingency			
TOTAL exc GST			

PART B: BACKGROUND

11 Relevant studies and reports

The following existing relevant reports will be provided to the successful consultant:

- 1994 Conservation Analysis and Policy document,
- 1995 Master Plan for the site,
- 2014 Visionary Plan for the Ballarat Botanical Gardens,
- 2018 Botanical Living Collection of Ballarat,
- 2019 North Gardens Sculpture Park Landscape Master Plan
- 2017 Lake Wendouree Master Plan

PART C: CONDITIONS OF ENGAGEMENT

12 Due diligence, risk and quality management

Project Management

- The Consultant will be required to work in close liaison with the Project Manager during the course of the project to ensure that services are delivered to an acceptable standard and in accordance with this project brief
- All meetings must take place in Ballarat unless otherwise agreed

Research and local context

- Significant background resources are already available, and the consultant is expected to utilise these where appropriate, rather than recreating some information sets
- The Services must be tailored to Ballarat, including Ballarat specific costs and local prices. Recommendations must be suited to the Ballarat context

Risk Management

- Assessment of constraints and risks must take a conservative approach and be cognisant of likely changes over time due to climate change
- Estimates of utility and community infrastructure and facility costs must be informed by any relevant risks and constraints identified

Communications

- The consultant must not meet with any stakeholders, including landowners, without representation of the City of Ballarat being present, unless otherwise agreed
- The consultant must not discuss the project or any associated issues with stakeholders, landowners and other parties except where required to complete the Services. Any enquiries received that fall outside of the Services are to be directed to the Project Manager
- The Consultant must not discuss the project or any associated issues with the media and is required to immediately direct any media enquiries to the Project Manager

Documentation:

All documentation must:

- Be produced based on research and to a standard defensible at an Independent Planning Panel Hearing
- Be produced in a format approved by the Project Manager
- Provide analysis, conclusions and clear recommendations in addition to reporting technical findings
- Be written in concise, clear and plain English
- Clearly state all assumptions
- Be delivered with ample time for review, as agreed (allowing for review time by multiple internal teams at the City of Ballarat, and by the Project Reference Group)

13 Format of materials

All analysis and mapping materials are to be provided at both draft and final report stages in the following formats:

- Reports – Microsoft Word (.docx) and Portable Document Format (.pdf)
- Mathematical and financial materials – Microsoft Excel (.xlsx)
- Spatial analysis and mapping materials – ESRI Shapefile format and high-quality Portable Document Format (.pdf) file (file size as required for project documentation/reports and suitable for supporting A1 size)
- All other materials – To be agreed with the Project Manager in advance

14 Variations and future work

- All variations must be approved in writing by Council, before any additional work is undertaken and or invoiced
- Additional work required at the completion of the Conservation Management Plan may be undertaken by agreed variation to the scope of works
- The consultant is expected to be willing to act as an Expert Witness at any future related Planning Panel Hearing, if requested by Council to do so

15 Conflicts of interest

Consultants must declare to the Project Manager any matter or issue that may be perceived to be or may lead to a conflict of interest regarding their Tender or supply of the Services. Tenders must describe a strategy for avoiding conflicts of interest.