SCOPE OF SERVICES – HERITAGE MANAGEMENT PLANNING

1. **Background**
   1. As one of Australia’s largest land managers, Defence is responsible for the management of a large, complex and diverse estate that has a mix of Indigenous, natural and historic heritage values. Defence must meet the challenges of balancing the requirement to identify, assess, conserve and manage heritage values while continuing to enable Defence’s operational and capability requirements.
   2. Defence has a range of obligations to identify, protect and manage the heritage values across the Defence estate under the *Environment Protection and Biodiversity Conservation Act* 1999(**EPBC Act**) and *Environment Protection and Biodiversity Conservation Regulations* 2000 (**Regulations**). The EPBC Act protects places included on the:
      1. Commonwealth Heritage List (**CHL**);
      2. National Heritage List (**NHL**); and
      3. World Heritage List (**WHL**).
   3. There are currently over 130 CHL places spread over 60 Defence properties. Several of these places are also included in the NHL either in their own right (RAAF Williams, Point Cook Victoria), or as part of a wider National Heritage listing (the Ningaloo Coast and the West Kimberley, Western Australia). Some properties are also part of, or adjacent to, a place on the WHL. For example Shoalwater Bay Training Area is located within the Great Barrier Reef World Heritage Declared property area. Defence also has 85 properties with assessed Commonwealth Heritage values not currently included on the CHL. Parts of the Defence estate are yet to be assessed against the criteria for the CHL.
   4. Defence is required to have heritage management plans in place for all places with National and Commonwealth heritage values. Defence is also required to carry out due diligence heritage values assessments during the acquisitions and disposals stages of the asset/property life cycle, and have management plans for places with identified and listed heritage values.
   5. Further information about heritage management of the Defence estate is provided in the Defence Estate Heritage Strategy 2017 available online at: <https://www.defence.gov.au/sites/default/files/2023-04/defenceheritagestrategy.pdf>.
2. **Commonwealth Objectives** 
   1. The objectives of the Services provided by the Consultant are to:
      1. provide heritage values assessments and prepare heritage management plans that cover all heritage values at Defence properties across the Defence estate (natural, Indigenous and historic) as required under the EPBC Act and Regulations;
      2. support Defence compliance with the EPBC Act and Regulations throughout the asset/property lifecycle through the preparation of comprehensive heritage assessments and management plans;
      3. bring innovative solutions to the heritage management planning of the Defence estate, including methods to communicate and celebrate our diverse heritage;
      4. work collaboratively with Defence and its partners, including major contract providers to learn about and stay up to date with Defence business practices, the Australian Defence Force and their capability requirements now and into the future to support heritage management planning across Defence sites;
      5. support Defence to build and maintain strong relationships with Traditional Owners and other Aboriginal and Torres Strait Islander interested parties as it undertakes heritage values assessments and develops management plans across the Defence estate; and
      6. ensure continuous improvement in all Engagements undertaken under the Panel and support Defence to increase efficiency and beneficial heritage outcomes in the heritage management of the Defence estate.
   2. The specific scope of Services for an Engagement will depend on the circumstances that arise at that point in the estate lifecycle.
3. **Skills and Qualifications**
   1. The Commonwealth requires suitably skilled persons to be offered by the Consultant, matched to the specific needs of the Services.
   2. The Consultant will be required to demonstrate at least two years’ experience with assessment and management planning and the development of heritage management plans for natural, Indigenous and historic heritage values under Commonwealth legislation and policy.
   3. The Consultant will be required to have and maintain skills in the assessment and management of natural, Indigenous and historic heritage values against relevant Statutory Requirements.
   4. The Consultant must have and maintain for the term of an Engagement an in-depth understanding of all relevant Statutory Requirements and policy frameworks for the Services, including any relevant applicable Australian and international standards. These include:
      1. the EPBC Act and Regulations and EPBC Act policies and guidelines published by the Department of the Environment and Energy and the Australian Heritage Council;
      2. the Defence Environment and Heritage Manual;
      3. the Defence Heritage Toolkit and other relevant Defence policies (where they apply to the Services);
      4. other Commonwealth policy guidance in existence, or which may be created, that relates to heritage management;
      5. Ask First, The Australia ICOMOS Burra Charter, and the Natural Heritage Charter; and
      6. periodic Defence information sessions for heritage Panel Consultants conducted during the term of the Panel.
4. **Services**
   1. The Consultant must provide the following Services in accordance with the timeframes outlined by the Commonwealth's Representative:
      1. assess the natural, Indigenous and historic (including archaeological) heritage values and significance of Defence properties in accordance with the criteria established under the EPBC Act, Regulations, administrative policies and guidelines, and any relevant Defence policies and guidelines;
      2. prepare relevant documentation to support Defence’s EPBC Act compliance including:
         1. plain English Heritage Assessments (**HAs**) and or Heritage Impact Assessments (**HIAs**) covering natural, Indigenous and historic heritage values in accordance with the EPBC Act and Regulations;
         2. plain English Heritage Management Plans (**HMPs**) (comprising both new plans and updates of existing plans) covering natural, Indigenous and historic heritage values in accordance with the EPBC Act and Regulations, including assistance with the public notification of HMPs where scoped by Defence. HMPs are to include updated condition and maintenance works data that can be included in the Defence maintenance process. Upon finalisation of HMPs, the Consultant will be required to provide all spatial data generated during the Engagement, complete Adobe Interactive Forms or Bulk Data Maintenance Environmental Factor Records (Heritage) spreadsheets as provided by Defence, to assist Defence with uploading approved heritage data updates to the Garrison and Estate Management System;
         3. undertake consultation with users of HMPs usually through a workshop and/or series of face to face meetings, including with Estate Maintenance and Operating Services (**EMOS**) contractors and other relevant Site Managers to determine and address gaps in the current document and improvements to make the document fit for purpose and accurately address a wide range of User requirements. The Consultant will be required to work closely with the national heritage policy and management team in Canberra to ensure appropriate and adequate user and stakeholder consultation is conducted;
         4. draft nomination documentation for the Commonwealth and/or National Heritage List and/or State and Territory List including to support, among others, properties being divested;
         5. conduct site surveys and prepare heritage condition reports for Defence managed assets and properties as required for the delivery of HAs and/or HMPs; and
         6. prepare information and reports for statutory reporting and compliance purposes and reviews as required under the Defence Heritage Strategy and EPBC Act and Regulations:
            1. reviewing the effectiveness of the implementation of HMPs for heritage assets, areas and properties; and
            2. reviewing and/or compliance checks of HMPs, HIAs and other heritage studies;
      3. provide information requested by Defence in the required format for input into the Garrison and Estate Management System and the Estate Appraisal process; and
      4. provide images, data layers and mapping required supporting the relevant document (shape files, photos as TIFs – min 300dpi for colour and 600dpi for black and white).
5. **Meetings**
   1. The Consultant may be required to attend, and at times facilitate, the following meetings in the course of delivering the Services:
      1. project industry briefings;
      2. project start-up meetings;
      3. stakeholder meetings and workshops;
      4. project progress meetings; and
      5. project feedback meetings.
   2. The Consultant may be required to attend other project specific meetings to be scoped and agreed with the Commonwealth during the course of delivering the Services.
   3. The Consultant may be required to travel to Defence sites or other locations as part of delivering the Services.
6. **Deliverables**
   1. The Consultant will be required to prepare a range of deliverables in delivering the Services including:
      1. concise project execution, stakeholder consultation and communication plans;
      2. HAs and HIAs prepared in accordance with the Defence Environment and Heritage Manual (available online at [https://www.defence.gov.au/business-industry/procurement/panel-arrangements/dip-ehee/who-engage](https://www.defence.gov.au/sites/default/files/2023-06/environment_heritage_manual_0.pdf)), EPBC Act, Regulations and policies. Three drafts will be required before a final draft for Defence finalisation approval;
      3. HMPs prepared in accordance with the EPBC Act and Regulations requirements. Three drafts will be required before a final draft is provided for Defence finalisation approval;
      4. project progress updates; and
      5. draft nomination/reporting documentation, heritage interpretive materials, draft print articles or conference presentations or other products as requested.
7. **Interpretation**
   1. Unless the context otherwise requires, capitalised terms in the Scope of Services or Brief will have the meaning given to them by the Defence Infrastructure Panel - Environment, Heritage and Estate Engineering 2020-2027 Terms of Engagement, Panel Conditions, Official Order, or the meaning given to them by the Commonwealth as published on the Defence website (https://www.defence.gov.au/business-industry), from time to time.