ICOMOS New Zealand Charter
for the Conservation of Places of Cultural Heritage Value

Revised 2010

Preamble

New Zealand retains a unique assemblage of places of cultural heritage value relating to its indigenous and more recent peoples. These areas, cultural landscapes and features, buildings and structures, gardens, archaeological sites, traditional sites, monuments, and sacred places are treasures of distinctive value that have accrued meanings over time. New Zealand shares a general responsibility with the rest of humanity to safeguard its cultural heritage places for present and future generations. More specifically, the people of New Zealand have particular ways of perceiving, relating to, and conserving their cultural heritage places.

Following the spirit of the International Charter for the Conservation and Restoration of Monuments and Sites (the Venice Charter - 1964), this charter sets out principles to guide the conservation of places of cultural heritage value in New Zealand. It is a statement of professional principles for members of ICOMOS New Zealand.

This charter is also intended to guide all those involved in the various aspects of conservation work, including owners, guardians, managers, developers, planners, architects, engineers, craftspeople and those in the construction trades, heritage practitioners and advisors, and local and central government authorities. It offers guidance for communities, organisations, and individuals involved with the conservation and management of cultural heritage places.

This charter should be made an integral part of statutory or regulatory heritage management policies or plans, and should provide support for decision makers in statutory or regulatory processes.

Each article of this charter must be read in the light of all the others. Words in bold in the text are defined in the definitions section of this charter.

This revised charter was adopted by the New Zealand National Committee of the International Council on Monuments and Sites at its meeting on 4 September 2010.

Purpose of conservation

1. The purpose of conservation

The purpose of conservation is to care for places of cultural heritage value.

In general, such places:

(i) have lasting values and can be appreciated in their own right;
(ii) inform us about the past and the cultures of those who came before us;
(iii) provide tangible evidence of the continuity between past, present, and future;
(iv) underpin and reinforce community identity and relationships to ancestors and the land; and
(v) provide a measure against which the achievements of the present can be compared.

It is the purpose of conservation to retain and reveal such values, and to support the ongoing meanings and functions of places of cultural heritage value, in the interests of present and future generations.
Conservation principles

2. Understanding cultural heritage value

Conservation of a place should be based on an understanding and appreciation of all aspects of its cultural heritage value, both tangible and intangible. All available forms of knowledge and evidence provide the means of understanding a place and its cultural heritage value and cultural heritage significance. Cultural heritage value should be understood through consultation with connected people, systematic documentary and oral research, physical investigation and recording of the place, and other relevant methods.

All relevant cultural heritage values should be recognised, respected, and, where appropriate, revealed, including values which differ, conflict, or compete.

The policy for managing all aspects of a place, including its conservation and its use, and the implementation of the policy, must be based on an understanding of its cultural heritage value.

3. Indigenous cultural heritage

The indigenous cultural heritage of tangata whenua relates to whanau, hapu, and iwi groups. It shapes identity and enhances well-being, and it has particular cultural meanings and values for the present, and associations with those who have gone before. Indigenous cultural heritage brings with it responsibilities of guardianship and the practical application and passing on of associated knowledge, traditional skills, and practices.

The Treaty of Waitangi is the founding document of our nation. Article 2 of the Treaty recognises and guarantees the protection of tino rangatiratanga, and so empowers kaitiakitanga as customary trusteeship to be exercised by tangata whenua. This customary trusteeship is exercised over their taonga, such as sacred and traditional places, built heritage, traditional practices, and other cultural heritage resources. This obligation extends beyond current legal ownership wherever such cultural heritage exists.

Particular matauranga, or knowledge of cultural heritage meaning, value, and practice, is associated with places. Matauranga is sustained and transmitted through oral, written, and physical forms determined by tangata whenua. The conservation of such places is therefore conditional on decisions made in associated tangata whenua communities, and should proceed only in this context. In particular, protocols of access, authority, ritual, and practice are determined at a local level and should be respected.

4. Planning for conservation

Conservation should be subject to prior documented assessment and planning.

All conservation work should be based on a conservation plan which identifies the cultural heritage value and cultural heritage significance of the place, the conservation policies, and the extent of the recommended works.

The conservation plan should give the highest priority to the authenticity and integrity of the place.

Other guiding documents such as, but not limited to, management plans, cyclical maintenance plans, specifications for conservation work, interpretation plans, risk mitigation plans, or emergency plans should be guided by a conservation plan.
5. **Respect for surviving evidence and knowledge**

Conservation maintains and reveals the **authenticity and integrity** of a place, and involves the least possible loss of **fabric** or evidence of cultural heritage value. Respect for all forms of knowledge and existing evidence, of both **tangible** and **intangible values**, is essential to the **authenticity and integrity** of the place.

Conservation recognises the evidence of time and the contributions of all periods. The conservation of a place should identify and respect all aspects of its cultural heritage value without unwarranted emphasis on any one value at the expense of others.

The removal or obscuring of any physical evidence of any period or activity should be minimised, and should be explicitly justified where it does occur. The fabric of a particular period or activity may be obscured or removed if assessment shows that its removal would not diminish the cultural heritage value of the place.

In conservation, evidence of the functions and intangible meanings of places of cultural heritage value should be respected.

6. **Minimum intervention**

Work undertaken at a place of cultural heritage value should involve the least degree of **intervention** consistent with conservation and the principles of this charter.

**Intervention** should be the minimum necessary to ensure the retention of tangible and intangible values and the continuation of uses integral to those values. The removal of fabric or the alteration of features and spaces that have cultural heritage value should be avoided.

7. **Physical investigation**

Physical investigation of a place provides primary evidence that cannot be gained from any other source. Physical investigation should be carried out according to currently accepted professional standards, and should be documented through systematic recording.

Invasive investigation of fabric of any period should be carried out only where knowledge may be significantly extended, or where it is necessary to establish the existence of fabric of cultural heritage value, or where it is necessary for conservation work, or where such fabric is about to be damaged or destroyed or made inaccessible. The extent of invasive investigation should minimise the disturbance of significant fabric.

8. **Use**

The conservation of a place of cultural heritage value is usually facilitated by the place serving a useful purpose.

Where the use of a place is integral to its cultural heritage value, that use should be retained.

Where a change of use is proposed, the new use should be compatible with the cultural heritage value of the place, and should have little or no adverse effect on the cultural heritage value.
9. Setting

Where the setting of a place is integral to its cultural heritage value, that setting should be conserved with the place itself. If the setting no longer contributes to the cultural heritage value of the place, and if reconstruction of the setting can be justified, any reconstruction of the setting should be based on an understanding of all aspects of the cultural heritage value of the place.

10. Relocation

The on-going association of a structure or feature of cultural heritage value with its location, site, curtilage, and setting is essential to its authenticity and integrity. Therefore, a structure or feature of cultural heritage value should remain on its original site.

Relocation of a structure or feature of cultural heritage value, where its removal is required in order to clear its site for a different purpose or construction, or where its removal is required to enable its use on a different site, is not a desirable outcome and is not a conservation process.

In exceptional circumstances, a structure of cultural heritage value may be relocated if its current site is in imminent danger, and if all other means of retaining the structure in its current location have been exhausted. In this event, the new location should provide a setting compatible with the cultural heritage value of the structure.

11. Documentation and archiving

The cultural heritage value and cultural heritage significance of a place, and all aspects of its conservation, should be fully documented to ensure that this information is available to present and future generations.

Documentation includes information about all changes to the place and any decisions made during the conservation process.

Documentation should be carried out to archival standards to maximise the longevity of the record, and should be placed in an appropriate archival repository.

Documentation should be made available to connected people and other interested parties. Where reasons for confidentiality exist, such as security, privacy, or cultural appropriateness, some information may not always be publicly accessible.

12. Recording

Evidence provided by the fabric of a place should be identified and understood through systematic research, recording, and analysis.

Recording is an essential part of the physical investigation of a place. It informs and guides the conservation process and its planning. Systematic recording should occur prior to, during, and following any intervention. It should include the recording of new evidence revealed, and any fabric obscured or removed.

Recording of the changes to a place should continue throughout its life.
13. **Fixtures, fittings, and contents**

Fixtures, fittings, and contents that are integral to the cultural heritage value of a place should be retained and conserved with the place. Such fixtures, fittings, and contents may include carving, painting, weaving, stained glass, wallpaper, surface decoration, works of art, equipment and machinery, furniture, and personal belongings.

Conservation of any such material should involve specialist conservation expertise appropriate to the material. Where it is necessary to remove any such material, it should be recorded, retained, and protected, until such time as it can be reinstated.

14. **Conservation processes and practice**

14. **Conservation plans**

A conservation plan, based on the principles of this charter, should:

(i) be based on a comprehensive understanding of the cultural heritage value of the place and assessment of its cultural heritage significance;

(ii) include an assessment of the fabric of the place, and its condition;

(iii) give the highest priority to the authenticity and integrity of the place;

(iv) include the entirety of the place, including the setting;

(v) be prepared by objective professionals in appropriate disciplines;

(vi) consider the needs, abilities, and resources of connected people;

(vii) not be influenced by prior expectations of change or development;

(viii) specify conservation policies to guide decision making and to guide any work to be undertaken;

(ix) make recommendations for the conservation of the place; and

(x) be regularly revised and kept up to date.

15. **Conservation projects**

Conservation projects should include the following:

(i) consultation with interested parties and connected people, continuing throughout the project;

(ii) opportunities for interested parties and connected people to contribute to and participate in the project;

(iii) research into documentary and oral history, using all relevant sources and repositories of knowledge;

(iv) physical investigation of the place as appropriate;

(v) use of all appropriate methods of recording, such as written, drawn, and photographic;

(vi) the preparation of a conservation plan which meets the principles of this charter;

(vii) guidance on appropriate use of the place;

(viii) the implementation of any planned conservation work;

(ix) the documentation of the conservation work as it proceeds; and

(x) where appropriate, the deposit of all records in an archival repository.

A conservation project must not be commenced until any required statutory authorisation has been granted.
16. **Professional, trade, and craft skills**

All aspects of conservation work should be planned, directed, supervised, and undertaken by people with appropriate conservation training and experience directly relevant to the project.

All conservation disciplines, arts, crafts, trades, and traditional skills and practices that are relevant to the project should be applied and promoted.

17. **Degrees of intervention for conservation purposes**

Following research, recording, assessment, and planning, intervention for conservation purposes may include, in increasing degrees of intervention:

(i) preservation, through stabilisation, maintenance, or repair;
(ii) restoration, through reassembly, reinstatement, or removal;
(iii) reconstruction; and
(iv) adaptation.

In many conservation projects a range of processes may be utilised. Where appropriate, conservation processes may be applied to individual parts or components of a place of cultural heritage value.

The extent of any intervention for conservation purposes should be guided by the cultural heritage value of a place and the policies for its management as identified in a conservation plan. Any intervention which would reduce or compromise cultural heritage value is undesirable and should not occur.

Preference should be given to the least degree of intervention, consistent with this charter.

Re-creation, meaning the conjectural reconstruction of a structure or place; replication, meaning to make a copy of an existing or former structure or place; or the construction of generalised representations of typical features or structures, are not conservation processes and are outside the scope of this charter.

18. **Preservation**

Preservation of a place involves as little intervention as possible, to ensure its long-term survival and the continuation of its cultural heritage value.

Preservation processes should not obscure or remove the patina of age, particularly where it contributes to the authenticity and integrity of the place, or where it contributes to the structural stability of materials.

i. **Stabilisation**

Processes of decay should be slowed by providing treatment or support.

ii. **Maintenance**

A place of cultural heritage value should be maintained regularly. Maintenance should be carried out according to a plan or work programme.

iii. **Repair**

Repair of a place of cultural heritage value should utilise matching or similar materials. Where it is necessary to employ new materials, they should be distinguishable by experts, and should be documented.
Traditional methods and materials should be given preference in conservation work.

Repair of a technically higher standard than that achieved with the existing materials or construction practices may be justified only where the stability or life expectancy of the site or material is increased, where the new material is compatible with the old, and where the cultural heritage value is not diminished.

19. Restoration

The process of restoration typically involves reassembly and reinstatement, and may involve the removal of accretions that detract from the cultural heritage value of a place.

Restoration is based on respect for existing fabric, and on the identification and analysis of all available evidence, so that the cultural heritage value of a place is recovered or revealed. Restoration should be carried out only if the cultural heritage value of the place is recovered or revealed by the process.

Restoration does not involve conjecture.

i. Reassembly and reinstatement

Reassembly uses existing material and, through the process of reinstatement, returns it to its former position. Reassembly is more likely to involve work on part of a place rather than the whole place.

ii. Removal

Occasionally, existing fabric may need to be permanently removed from a place. This may be for reasons of advanced decay, or loss of structural integrity, or because particular fabric has been identified in a conservation plan as detracting from the cultural heritage value of the place.

The fabric removed should be systematically recorded before and during its removal. In some cases it may be appropriate to store, on a long-term basis, material of evidential value that has been removed.

20. Reconstruction

Reconstruction is distinguished from restoration by the introduction of new material to replace material that has been lost.

Reconstruction is appropriate if it is essential to the function, integrity, intangible value, or understanding of a place, if sufficient physical and documentary evidence exists to minimise conjecture, and if surviving cultural heritage value is preserved.

Reconstructed elements should not usually constitute the majority of a place or structure.

21. Adaptation

The conservation of a place of cultural heritage value is usually facilitated by the place serving a useful purpose. Proposals for adaptation of a place may arise from maintaining its continuing use, or from a proposed change of use.
Alterations and additions may be acceptable where they are necessary for a compatible use of the place. Any change should be the minimum necessary, should be substantially reversible, and should have little or no adverse effect on the cultural heritage value of the place.

Any alterations or additions should be compatible with the original form and fabric of the place, and should avoid inappropriate or incompatible contrasts of form, scale, mass, colour, and material. Adaptation should not dominate or substantially obscure the original form and fabric, and should not adversely affect the setting of a place of cultural heritage value. New work should complement the original form and fabric.

22. Non-intervention

In some circumstances, assessment of the cultural heritage value of a place may show that it is not desirable to undertake any conservation intervention at that time. This approach may be appropriate where undisturbed constancy of intangible values, such as the spiritual associations of a sacred place, may be more important than its physical attributes.

23. Interpretation

Interpretation actively enhances public understanding of all aspects of places of cultural heritage value and their conservation. Relevant cultural protocols are integral to that understanding, and should be identified and observed.

Where appropriate, interpretation should assist the understanding of tangible and intangible values of a place which may not be readily perceived, such as the sequence of construction and change, and the meanings and associations of the place for connected people.

Any interpretation should respect the cultural heritage value of a place. Interpretation methods should be appropriate to the place. Physical interventions for interpretation purposes should not detract from the experience of the place, and should not have an adverse effect on its tangible or intangible values.

24. Risk mitigation

Places of cultural heritage value may be vulnerable to natural disasters such as flood, storm, or earthquake; or to humanly induced threats and risks such as those arising from earthworks, subdivision and development, buildings works, or wilful damage or neglect. In order to safeguard cultural heritage value, planning for risk mitigation and emergency management is necessary.

Potential risks to any place of cultural heritage value should be assessed. Where appropriate, a risk mitigation plan, an emergency plan, and/or a protection plan should be prepared, and implemented as far as possible, with reference to a conservation plan.
Definitions

For the purposes of this charter:

**Adaptation** means the process(es) of modifying a place for a compatible use while retaining its cultural heritage value. Adaptation processes include alteration and addition.

**Authenticity** means the credibility or truthfulness of the surviving evidence and knowledge of the cultural heritage value of a place. Relevant evidence includes form and design, substance and fabric, technology and craftsmanship, location and surroundings, context and setting, use and function, traditions, spiritual essence, and sense of place, and includes tangible and intangible values. Assessment of authenticity is based on identification and analysis of relevant evidence and knowledge, and respect for its cultural context.

**Compatible use** means a use which is consistent with the cultural heritage value of a place, and which has little or no adverse impact on its authenticity and integrity.

**Connected people** means any groups, organisations, or individuals having a sense of association with or responsibility for a place of cultural heritage value.

**Conservation** means all the processes of understanding and caring for a place so as to safeguard its cultural heritage value. Conservation is based on respect for the existing fabric, associations, meanings, and use of the place. It requires a cautious approach of doing as much work as necessary but as little as possible, and retaining authenticity and integrity, to ensure that the place and its values are passed on to future generations.

**Conservation plan** means an objective report which documents the history, fabric, and cultural heritage value of a place, assesses its cultural heritage significance, describes the condition of the place, outlines conservation policies for managing the place, and makes recommendations for the conservation of the place.

**Contents** means moveable objects, collections, chattels, documents, works of art, and ephemera that are not fixed or fitted to a place, and which have been assessed as being integral to its cultural heritage value.

**Cultural heritage significance** means the cultural heritage value of a place relative to other similar or comparable places, recognising the particular cultural context of the place.

**Cultural heritage value/s** means possessing aesthetic, archaeological, architectural, commemorative, functional, historical, landscape, monumental, scientific, social, spiritual, symbolic, technological, traditional, or other tangible or intangible values, associated with human activity.

**Cultural landscapes** means an area possessing cultural heritage value arising from the relationships between people and the environment. Cultural landscapes may have been designed, such as gardens, or may have evolved from human settlement and land use over time, resulting in a diversity of distinctive landscapes in different areas. Associative cultural landscapes, such as sacred mountains, may lack tangible cultural elements but may have strong intangible cultural or spiritual associations.

**Documentation** means collecting, recording, keeping, and managing information about a place and its cultural heritage value, including information about its history, fabric, and meaning; information about decisions taken; and information about physical changes and interventions made to the place.
Fabric means all the physical material of a place, including subsurface material, structures, and interior and exterior surfaces including the patina of age; and including fixtures and fittings, and gardens and plantings.

Hapu means a section of a large tribe of the tangata whenua.

Intangible value means the abstract cultural heritage value of the meanings or associations of a place, including commemorative, historical, social, spiritual, symbolic, or traditional values.

Integrity means the wholeness or intactness of a place, including its meaning and sense of place, and all the tangible and intangible attributes and elements necessary to express its cultural heritage value.

Intervention means any activity that causes disturbance of or alteration to a place or its fabric. Intervention includes archaeological excavation, invasive investigation of built structures, and any intervention for conservation purposes.

Iwi means a tribe of the tangata whenua.

Kaitiakitanga means the duty of customary trusteeship, stewardship, guardianship, and protection of land, resources, or taonga.

Maintenance means regular and on-going protective care of a place to prevent deterioration and to retain its cultural heritage value.

Matauranga means traditional or cultural knowledge of the tangata whenua.

Non-intervention means to choose not to undertake any activity that causes disturbance of or alteration to a place or its fabric.

Place means any land having cultural heritage value in New Zealand, including areas; cultural landscapes; buildings, structures, and monuments; groups of buildings, structures, or monuments; gardens and plantings; archaeological sites and features; traditional sites; sacred places; townscape and streetscapes; and settlements. Place may also include land covered by water, and any body of water. Place includes the setting of any such place.

Preservation means to maintain a place with as little change as possible.

Reassembly means to put existing but disarticulated parts of a structure back together.

Reconstruction means to build again as closely as possible to a documented earlier form, using new materials.

Recording means the process of capturing information and creating an archival record of the fabric and setting of a place, including its configuration, condition, use, and change over time.

Reinstatement means to put material components of a place, including the products of reassembly, back in position.

Repair means to make good decayed or damaged fabric using identical, closely similar, or otherwise appropriate material.

Restoration means to return a place to a known earlier form, by reassembly and reinstatement, and/or by removal of elements that detract from its cultural heritage value.

Setting means the area around and/or adjacent to a place of cultural heritage value that is integral to its function, meaning, and relationships. Setting includes the structures, outbuildings, features, gardens, curtilage, airspace, and accessways forming the spatial context of the place or used
in association with the place. Setting also includes cultural landscapes, townscapes, and streetscapes; perspectives, views, and viewshafts to and from a place; and relationships with other places which contribute to the cultural heritage value of the place. Setting may extend beyond the area defined by legal title, and may include a buffer zone necessary for the long-term protection of the cultural heritage value of the place.

Stabilisation means the arrest or slowing of the processes of decay.

Structure means any building, standing remains, equipment, device, or other facility made by people and which is fixed to the land.

Tangata whenua means generally the original indigenous inhabitants of the land; and means specifically the people exercising kaitiakitanga over particular land, resources, or taonga.

Tangible value means the physically observable cultural heritage value of a place, including archaeological, architectural, landscape, monumental, scientific, or technological values.

Taonga means anything highly prized for its cultural, economic, historical, spiritual, or traditional value, including land and natural and cultural resources.

Tino rangatiratanga means the exercise of full chieftainship, authority, and responsibility.

Use means the functions of a place, and the activities and practices that may occur at the place. The functions, activities, and practices may in themselves be of cultural heritage value.

Whanau means an extended family which is part of a hapu or iwi.


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This revised text replaces the 1993 and 1995 versions and should be referenced as the ICOMOS New Zealand Charter for the Conservation of Places of Cultural Heritage Value (ICOMOS New Zealand Charter 2010).

This revision incorporates changes in conservation philosophy and best practice since 1993 and is the only version of the ICOMOS New Zealand Charter approved by ICOMOS New Zealand (Inc.) for use.

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