

Volume 2, Issue 2 (January-June 2017)

## **Recognising connection: social significance and heritage practice<sup>1</sup>**

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[Received: 09/11/2016. Accepted for publication: 14/11/2016]

### **Abstract**

Appreciation of community connections to place is an emerging domain in heritage practice, establishing inclusive, people-centered approaches that are able to 'hold their own' within the dominant paradigm of expert and State-centered practice. It sits within the framework of values-based management.

Social value has developed as an important way that concepts such as shared identity can be expressed in relation to heritage places. Globally it offers a much needed perspective, aligned with "people-centered approaches", and with the potential to co-create understandings of values with those who hold those values. Australia's experience and leadership have been and are still key, but equally there is now the chance for an enrichment and expansion of the concepts advanced to date as others from different cultural backgrounds start to engage in this discourse.

This paper explores how social value emerged in Australian heritage discourse, bringing contemporary community connections into heritage practice, examines its influence internationally by looking at selected documents, and using selected case studies to illustrate methodologies and reveal learnings draws out some key issues.

### **Keywords**

Cultural heritage management, social value, social significance, values-based management, participatory methodologies.

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<sup>1</sup> Director's Note: *Córima, Revista de Investigación en Gestión Cultural* acknowledges and thanks to the generosity of the author Chris Johnston for writing this original article exclusively for this Journal.

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## Introduction

Social significance evokes the continuous, daily and often unconscious engagement between us and our environment, where people, place and memory all have agency:

Individuals and communities are engaged in an endless conversation with the landscapes in which they live. One side of this conversation involves people giving meaning to places through the events in their lives which have 'taken place' in landscapes. Generations pass knowledge of these events down to each other. Often the events have left no mark on the places or on the landscapes, but people remember what has happened. It is as if we carry around in our heads a map of the landscape which has all these places and their meanings detailed on it. When we walk through our landscapes the sight of a place will often trigger the memories and the feelings – good or bad, happy or sad – which go with them. This is the other side of the conversation: it is the landscape talking to us. The key thing is that a heritage practitioner, who is a stranger or outsider in these local landscapes, can never discover this world of meaning just by observing a place. They can only know about it by talking to people. This is the essence of social significance assessment and it is the thing that we heritage practitioners have not done enough of (Byrne, Brayshaw & Ireland, 2003, p. 3).

The practice of social significance assessment seeks to articulate these almost ineffable relationships, drawing on methods from ethnography and public participation in particular, and integrating them into a heritage framework of place, values, significance and conservation management.

Social significance arose as a distinct counter-discourse to the dominant cultural heritage discourse that focused on the tangible, particularly the conservation of fabric and on built environments, and that relied on the accumulated wisdom and connoisseurship of discipline-based experts. The origins of this dominant cultural heritage discourse have been well explored, both in its expression through the authorizing institutions of international and national charters, legislation and conventions (see Smith, 2006) and in practice (see for example Harrison, 2013).

Some of the concepts underpinning social significance practice as it emerged in the early 1990s have now become the subject of critical thinking in the emerging field of heritage studies, representing a formulation of heritage as a distinct discipline with a framework of theory, not just practice, and recognising its companion disciplines as cultural studies, ethnography, public history, memory studies and community archaeology to name a few.

These concepts include the experiential nature of people-place or people-environment relationships, the sustaining connection between heritage and identity, the nature of shared memory and processes of remembering, and the private and public qualities of heritage (heritage as performance for example) (Johnston, 1992). That these are evident in social significance practice at that time indicates an accumulation of concerns about heritage practice in Australia. This accumulation was accompanied by strong national government engagement with broadly defined concepts of natural and cultural

heritage, and a professional openness (at least amongst some) to challenge the status quo and explore new approaches.

The 1970-80s also witnessed the rise of interest in environmental perception, drawing on philosophical, landscape and geographic studies, introducing important ideas such as a sense of place, where meanings are imbued into place through lived experience (for example Tuan, 1974). While some strands of landscape perception work focused on simplified ways of testing public acceptance of landscape change (for example USDA Forest Service, 1974), others linked history, place and public memory into evocations of the power of place (for example Hayden 1995), and yet others examined how we read the seen landscape (for example Berger, 1973; Meinig, 1979).

This paper seeks to examine social value assessment, looking at Australian practice within an international perspective of values-based heritage management, and exploring some brief case examples which together illustrate the working out of methodologies and dilemmas through praxis – the act of engaging, applying, exercising, realizing and practising ideas.

## **The value of values**

Values, in heritage practice, means the “positive characteristics or qualities perceived in cultural objects or sites” by particular persons or groups (Mason 2002, p. 4). Values are embedded in or connected with or triggered by things – by objects or sites but also by practices, stories and memories – and in relation to social and aesthetic values are often triggered experientially.

Mason (2002, p.6) describes four parts to the process of understanding values:

1. **Characterizing the value** so that it can be clearly identified and makes sense, in this instance, to both the values-holders (communities and cultural groups) and practitioners
2. **Methods and strategies** that are helpful and appropriate to the revealing and understanding of values
3. **Tools** for eliciting and characterizing heritage values
4. **Integrating values** into policies, priority setting and decision-making.

These parts form a logical sequence, and helpfully distill what is needed in shaping a practice around values, or in this case around a cluster of values referred to as social value. Like the Burra Charter, Mason’s steps move from understanding to action, building values into the very foundations of heritage planning and management. This process of values-based management is now fundamental to heritage practice globally, although it is not without its critics. The benefit of this apparently simple process is in the clear articulation of values.

The concept of a typology of heritage values is proposed by Mason as a method of recognizing and characterizing the breadth of potential values so as to establish a common language “in which all parties values can be expressed” and to avoid a ‘black box’ where values are “collapsed into an aggregated statement of significance” which he

suggests will prove ineffective in conserving divergent values simultaneously (Mason, 2002, pp. 8-10). A typology can explicitly include diverse values, demonstrating to community values-holders that there is a space in the process in which their values can be recognized. A case study on the Upper Mersey Valley later in this paper looks at the use of community-defined values rather than the more common approach where values are defined through legislation and policy.

The challenge in using a values typology is in the interpretation of each value, and in what might be perceived to be included or excluded. This topic is well debated in the literature: Fredheim and Khalaf (2016) for example, provide a thorough analysis of dilemmas and prospects in the framing of values, noting that some values typologies in seeking to be inclusive have become lengthy and probably unusable, suggesting that “a comprehensive, universally applicable value typology is an impossibility” (pp. 467-469). Nevertheless, Fredheim and Khalaf do not abandon typologies but rather seek to explicate a simpler but more encompassing approach (2016, pp. 472-474).

In response to such challenges, Australian practice has progressively build up a compendium of guidance, starting with the Burra Charter itself, then elaborated in two Guidelines to the Burra Charter (Australia ICOMOS, 1988) and most recently in a revised Burra Charter and Practice Notes (Australia ICOMOS, 2013). The formalization of values into criteria, and then into legal frameworks potentially imposes a culturally-specific framework that requires values to ‘fit’ or if not, to be excluded. While this is clearly an ever-present risk with any typology or framework, the guidance on applying the criteria for the Australian National Heritage List offers an interesting example of a comprehensive framework that defines some legal boundaries, but otherwise encourages recognition and inclusion of all values. It is at the national level in Australia where social value is the most often well-addressed.

## **Social value in practice**

### *Australian approaches*

In Australia, state and territory governments, along with local governments, are the principal spheres for the identification, listing and statutory protection of cultural heritage places, along with a smaller role for the national government now primarily focused on the creation of a highly selective National Heritage List (NHL).

The first Australian national government agency, the Australian Heritage Commission (AHC) was established in 1975 and charged with the task of recognising the ‘National Estate’ – the common and shared heritage of Australians – defined as the places “that have aesthetic, historic, scientific or social significance or other special value for future generations as well as for the present community” (Australian Heritage Commission Act 1975 [s.4.1]). Australia ICOMOS, formed in 1976, also set out to establish heritage practice that was relevant to Australian circumstances, formulating what was to be the first *Australia ICOMOS Charter for the conservation of places of cultural significance*, the Burra Charter, in 1979. The Burra Charter introduced three new terms: place, cultural significance – with the component values being aesthetic, historic, scientific or social – and fabric (Walker, 2014, pp. 9-10; Ahmad, 2006, p. 297).

When the AHC turned to the task of defining social value, it recognised that “social significance rests with the community” and that it would not “lend itself to ‘expert’ analysis like that applied to the assessment of historic or architectural values”.<sup>3</sup> The AHC was equally cautious about the way that social significance was expressed, adopting in their 1988 guidance the phrase “places which have importance for cultural or social associations, or as a focus of strong cultural or social sentiment for a community” (Australian Heritage Commission, 1988) and drawing back from the range of sentiments expressed by Australia ICOMOS (1988) which included “spiritual, political, national or other cultural sentiments” on the basis that social value might be used to give recognition to “a transitory revival of emotion or an upsurge of political aspirations” (Australian Heritage Commission, 1988; Johnston, 2014, p. 40).

As it turned out, the word sentiment was equally transitory and has never appeared in heritage criterion and is not currently used in Australian definitions of social value. On the other hand, the notion of a direct, contemporary association between a place and a people was established then and remains one of the key characteristics of social value.

Social significance practice in Australia did adopt key elements of the dominant heritage discourse at the time: it did use *place* and *values* as a framing devices for example, and established a broad methodology (explained below) designed to enable this aspect of significance to stand as an equal with the other defined values.

The definition of social value is now relatively consistent across all Australian jurisdictions (except NSW), using the criterion derived from the AHC’s adopted criterion: «*The place has strong or special association with a particular community or cultural group for social, cultural or spiritual reasons.*»

At the national level, this criterion is one of two that makes direct reference and requires evidence that the value is held by a specific cultural group or community, the other being aesthetic value: «*The place has outstanding heritage value to the nation because of the place’s importance in exhibiting particular aesthetic characteristics valued by a community or cultural group*» (Australian Department of the Environment and Energy, 2016).

Why did social value emerge as a key idea so early in Australian heritage practice, but much later elsewhere? The answer may lie in the particularity of the circumstances that shaped Australian heritage consciousness: a post-war development boom; community activism around redevelopment proposals that would adversely impact inner city areas, open spaces and park lands; modernism; the National Trust movement, and government response in terms of legislation. Together these factors supported the development of a nascent heritage profession, and in turn this lead to a review of inherited, European approaches to heritage such as the Venice Charter.

Meredith Walker provides a fuller account of this period, noting the comment of one Australian heritage practitioner that while the “philosophy of the Venice Charter was sound [...] it was not likely to be of much practical use to builders and architects seeking answers to conservation questions in Australia” (Walker, 2014, pp. 9-11). Nevertheless,

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<sup>3</sup> In practice, the majority of social significance assessments undertaken in Australia have been undertaken by heritage ‘experts’, and although at times their work has been prompted by community advocacy, there are few example of community-initiated and led assessments.

as Byrne *et al.* (2003, p. 11) point out, the rise of social value as a consideration in Australian heritage practice is also reflected in international trends, especially those focused on recognising Indigenous heritage and the rights of Indigenous peoples. And an examination of World Heritage practice reveals that progress has been slow, with the notion of 'people-centred approaches' a recent phenomenon. With no international review of social value yet undertaken, these questions remain interesting, but unanswerable.

## **Global perspectives and practices**

The concept of social significance, as it emerged in Australian heritage practice in the early 1990s, was not matched internationally, but instead different ideas arose from local practices.

Examining the take-up of the concept of social value in the UK and Europe, Jones (2016) starts with a definition that is strongly aligned with current Australian practice: she defines social value as "encompassing the significance of the historic environment to contemporary communities, including people's sense of identity, belonging and place, as well as forms of memory and spiritual association" (p.1). Following Johnston (1992, p. 10) and Byrne *et al.* (2003) she defines social value as "a collective attachment to place that embodies meanings and values that are important to a community or communities" noting that this encompasses a basis for "identity, distinctiveness, belonging and social interaction" and "accommodates form of memory, oral history, symbolism and cultural practice" (Jones and Leech, 2015; Jones, 2016, p. 3).

Three key moves to recognize community-held values are identified: the first was the *European Landscape Convention* (Council of Europe, 2000 in Jones & Leech 2015, p. 9) which proposed engagement with the "parties" and "populations" who hold the values, followed by the *Faro Convention* which emphasises the "commonplace heritage of all people" with a focus on "ascribed values rather than on the material or immaterial elements which combine to constitute heritages" and where these ascribed values are the product of (self-defined) heritage communities, and not simply the product of expert-analysis (Jones and Leech, 2015, p. 10; Jones, 2016, p. 3).

The third move is the Conservation Principles document (English Heritage, 2008) which proposed *communal value* as one of four values – evidential value, historical value, aesthetic value, communal value. Two of these values are expressed in terms of people's relationship to place or environment: *communal value* refers to the "meanings of a place for the people who relate to it, or for whom it figures in their collective experience or memory" and aesthetic value to "the ways in which people draw sensory and intellectual stimulation from a place". Communal value is described as comprising commemorative and symbolic values that "reflect the meanings of a place for those who draw part of their identity from it, or have emotional links to it", referencing memorials as an example, and social value as associated with "places that people perceive as a source of identity, distinctiveness, social interaction and coherence".

The third element is spiritual value which is often "associated with places sanctified by longstanding veneration or worship, or wild places with few obvious signs of modern life". The guidance notes that such values may change over time, that they may also be

associated with negative “uncomfortable events, attitudes or (historical) periods” and that they may also be less dependent on the survival of historic fabric but conversely may also be the “driving force behind a desire for reconstruction” (English Heritage, 2008, pp. 31-32). However, Jones concludes that while all three UK heritage agencies<sup>4</sup> are placing an increasing emphasis on significance, social value and participation, these concepts are still rarely evident in practice (Jones, 2016, pp. 3-4). Further, the statutory listing criteria applied by Historic England appear to remain as a combination of architectural, historic or archaeological depending on the nature of the place, and there appears to be no further guidance available on suitable methods for the articulation of social value.

The Getty Conservation Institute’s (GCI) project Research on the Values of Heritage represented a major international initiative over a period of seven years (1998-2005) to examine and improve understanding of values and valuing processes that underpin effective heritage planning and management. The project documents the rise of values-based approaches in heritage planning and management, and explores aspects of values across a series of reports and case studies (the Port Arthur case study is discussed below).

Mason proposed a typology of socio-cultural values, being historical, cultural/symbolic, social, spiritual/religious and aesthetic values (2002, p. 10). He defined cultural/symbolic value as encompassing “those shared meanings that are not strictly speaking historic” and political value - a particular type of cultural/symbolic value- as reflecting the “connection between civic/social life and the physical environment and from the capacity of heritage sites in particular to stimulate the kind of positive reflection and political behavior that builds civil society”, an interesting inclusion given the Australian government’s decision not to follow Australia ICOMOS’s 1988 definition of social value (Mason, 2002, p. 11; Johnston 2014, p. 40).

Mason goes on to define social value in two ways, first as social capital in the sense that the “social values of heritage enable and facilitate social connections, networks and other relations” giving as an example that the “social values of a heritage site might include the use of a site for social gatherings such as celebrations, markets, picnics or ball games – activities that [...] capitalize [...] on the public-space, shared-space qualities” (Mason, 2002, p. 12). His second social value type is place attachment which he defines as the “social cohesion, community identity, or other feelings of affiliation that social groups derive from the specific heritage and environments of their “home” territory” (Mason, 2002, p. 12). Other writers allude to this duality in the use of the term ‘social value’, however here our interest is limited to its heritage meaning.

In the Pacific, Indigenous peoples are the dominant communities, even where colonial powers have held sway in the past; amongst indigenous and ‘ethnic’ peoples, cultural heritage is often expressed quite differently, with nature and culture indivisible, and what is now defined as intangible cultural heritage seamlessly interwoven with the tangible. Given this, it might be expected that the concept of social value might be strongly articulated in heritage practice. However, heritage dialogue across the Pacific has been focused on understanding the relationship between local versus universal values as States Parties and communities with a shared heritage seek recognition

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<sup>4</sup> Historic England (previously English Heritage), Historic Environment Scotland, Department of the Environment Northern Ireland.

through the World Heritage List; social value is not thought to be specifically considered currently although further investigation is warranted (Anita Smith, pers. comm.).

Turning to Asia, three key documents are worth examining in relation to values and the recognition of social value: the Nara Document on Authenticity (ICOMOS, 1994), the China Principles (China ICOMOS, 2002 & 2015), and the ASEAN Declaration on cultural heritage (ASEAN 2000).

The 1994 *Nara Document on Authenticity* recognises the need for culturally-derived approaches to heritage conservation based on the idea that what constitute values vary from culture to culture, and therefore cultural heritage must be evaluated according to the culture to which it belongs, with authenticity (the main focus of the Nara Document) judged through a range of physical attributes as well as “traditions [...] spirit and feeling” (ICOMOS, 1994).

The 2002 China Principles<sup>5</sup>, described as the first Asian charter for heritage professionals (and sometimes as China’s Burra Charter) was developed through an international collaboration, and influenced by the Values of Heritage work of the GCI as well as by Australia ICOMOS. The first China Principles (ICOMOS China, 2002) represented heritage narrowly, expressing the values as historical, artistic and scientific despite the fact that the Chinese heritage authorities were said to be impressed by the Burra Charter because of its “wide recognition and application in Australia’s heritage industry, and particularly for its attempt to address the conservation of living sites and their values” (Qian, 2007).

The actual similarities with the Burra Charter are limited to key conservation processes and practice, and the 2002 China Principles did not include the concepts of associations, meanings and participation that are a feature of the 1999 Burra Charter (China ICOMOS, 2002; Australia ICOMOS, 1999). Further, Qian points out that the 2002 China Principles did not address important heritage issues in China such as “the historic landscape in historically and cultural famous cities” where “(M)any neighbourhoods have been altered so much that they are now unrecognisable even to people who used to live there, and consequently these cities are losing their identity”. On this basis, Qian asserted that the China Principles should not be regarded as universal guidelines for the heritage profession (Qian, 2007, pp. 257-263).

Recognizing that heritage practice and social and economic conditions in China had changed, a review the China Principles started in 2010, and a revised document was released in 2015. In relation to values the 2015 China Principles now recognize social value:

Cultural and social values based on theoretical research and practices in heritage conservation and use both in China and internationally. [...] Social value is demonstrated when a heritage site generates social benefits<sup>6</sup> in aspects such as maintaining knowledge and spiritual continuity and enhancing social coherence, while cultural value is closely connected to cultural diversity and intangible heritage. The concepts of cultural and social

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<sup>5</sup> The GCI, as part of the Values of Heritage project, contributed to the development and publication of the China Principles.

<sup>6</sup> Here social value is used in two distinctly different ways, as social capital and in its heritage meaning.



values have [...] played a positive role in constructing the value-based theoretical system of Chinese heritage conservation (ICOMOS China, 2015, p. 56).

Article 3 defines social value as encompassing 'memory, emotion and education' and cultural value as comprising "cultural diversity, the continuation of traditions, and essential components of intangible cultural heritage" (ICOMOS China, 2015, p. 61).

The 2015 China Principles now advocates participation, seeing the role of heritage as contributing to "contemporary society's cultural and spiritual needs [...] (and preserving) its history, culture, and the memory of society" (ICOMOS China, 2015, p. 64). The importance of continuing cultural traditions that are part of the significance of the place is also now recognised (ICOMOS China, 2015, Article 13, p. 69). However, apart from some references to living sites and community participation in later articles, and while great detail is advanced on conservation requirements for specific features and place types, there is no further guidance on how to identify, document or conserve social and cultural values (ICOMOS China, 2015, pp. 83-104).

The ASEAN Declaration on Cultural Heritage (ASEAN, 2000) recognises cultural heritage as both "significant cultural values and concepts" as well as physical forms and cultural practices, noting aspects of social value such as "cultural survival and identity", referring to anthropological and sociological values (along with historical, aesthetic, and scientific) and expressing the importance of "living popular cultural heritage and traditions" as offering an important basis for social and intercultural understanding. The degree of refinement of the scope and definitions at national levels in Southeast Asia varies and a detailed examination of social value across this region is beyond the scope of this paper.<sup>7</sup>

To date, no other charters or substantial guidance documents on social value are understood to have emerged from the countries of South East Asia, the Indian sub-continent or the Pacific (Ahmad, 2006, p. 298), but in the absence of such documents, there is plenty of evidence of interest in and practice around social value, for example, the 2016 conference of the Organisation of World Heritage Cities - Asia and the Pacific, through community-based heritage investigations by Yangon Heritage Trust, interdisciplinary events like Lanes and Neighbourhoods in Cities in Asia (Asia Research Institute, June 2016) and many others.

The World Heritage system has slowly but progressively provided for greater recognition of aspects of social value, in particular through changes such as the 1994 Global Strategy designed to create a balanced, credible World Heritage List; revisions to the criteria; recognition of associative values; the Budapest Declaration in (2002) seeking "the active involvement of [...] local communities at all levels in the identification, protection and management of [...] World Heritage properties" (de Merode, 2004, p. 10); and the inclusion of cultural landscapes in 2003. More specifically, the introduction of the fifth "C" in 2007 during Tumu Te Teuheu's time as Chair of the World Heritage Committee (WHC) sought to enhance the role of communities in World Heritage. This

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<sup>7</sup> ASEAN socio-cultural community blueprint 2025 (ASEAN, 2016), responding to Agenda 2030, expresses a vision for the ASEAN that includes "A dynamic and harmonious community that is aware and proud of its identity, culture, and heritage with the strengthened ability to innovate and proactively contribute to the global community" but provides no specific strategic measures towards that goal.

initiative continues to present a significant challenge to the WHC, with its focus on the global rather than local domains. The 2012 Operational Guidelines now stress the participation of local people in the nomination process along with and “full approval of local communities in cultural landscape nominations” but achieving such participation requires time and resources (Smith, 2015b, p. 184).

The Kyoto Vision, declared at the Closing Event of the 40th Anniversary of the World Heritage Convention in Kyoto, Japan (6-8 November, 2012) frames a new direction, expressing the conviction that people-centered conservation is the new mode for the future: “heritage results from the dynamic and continuous interaction between communities and their environment” and advocating that the role of the community is to be “grounded in a multi-disciplinary and participatory approach to heritage conservation” (UNESCO World Heritage Centre, 2012).

A far greater emphasis on the intrinsic relationship between people and place is now apparent in practice too, particularly in relation to Indigenous communities, in part through the advocacy from the International Workshop on World Heritage Convention and Indigenous Peoples and in part through the activities of IUCN in initiating the notion of ‘people-centered approaches’ (Smith, 2015b p. 184). An example of the latter is the COMPACT project (Community Management of Protected Areas Conservation) which seeks to support local communities in their stewardship of World Heritage sites (Brown & Hay-Edie, 2013, p. 135).

For example, COMPACT has tested community mapping and participatory GIS systems designed to capture, communicate and analyse community knowledge in ways that are flexible, culturally appropriate and interactive (Brown & Hay-Edie, 2014, p. 43). In Belize for example, a ‘rapid community assessment’ methodology was used to understand the level of knowledge within local communities about the marine protected areas and the World Heritage site, and the relationship of local communities to the biodiversity of the protected area, helping gauge their willingness to participate in the conservation of the barrier reef (Brown & Hay-Edie, 2013, p. 16). Such techniques and their careful testing in COMPACT may build confidence in their use for social value projects.

In many ways the universalizing concepts that underpin the World Heritage system run directly counter to the idea of ‘locally constituted meanings’ (Jones, 2016, p. 5) and considerable effort has been made over the last decade to address this tension, with limited success. If social value is founded on cultural specificity (as is suggested in the Nara Document) and represented for example through living traditions, place connections and distinctive identities, then World Heritage is a form of abstracted universalism, neither engaging with nor representing cultural diversity despite the expressed desire to do so (Smith, 2015b, p. 180).

For example, places valued by Indigenous peoples are significantly under-represented on the World Heritage List, with “Indigenous values or understandings of place, land or seascapes through traditional or customary knowledge systems” not seen as a sufficient basis on which to justify outstanding universal value (Smith, 2015b, p. 177). Social value, being a value held by a specific community, may be seen as primarily local, however a place may be of international significance for distinctly different reasons to those for which it is valued by local communities. For Indigenous peoples and places it is “precisely these local values – or traditional knowledge systems – that need to be recognized as outstanding universal value if Indigenous peoples and communities are to

be recognized on the World Heritage List”, citing the examples of Marae Taputapuātea and the Opoa Valley (French Polynesia), Uluru-Kata Tjuṯa (Australia), Tongariro National Park (Aotearoa/New Zealand) and Chief Roi Mata’s Domain (Vanuatu) (Smith, 2015a, p. 112).

Of course it could be suggested that other frameworks applied in the assessment of heritage values also seek to define a singular rather than multiple perspectives on place and its meanings. One of the techniques employed in Australian social value assessment has been to specify the community or cultural group to whom the value is attributed, seeking to avoid universalizing or homogenizing. A place may thus have multiple and distinct values for a variety of different communities or cultural groups. The challenge for the heritage place manager is then the management of a complex of potentially divergent values.

Compare this to the singular expression of historical value that is still commonplace in most heritage assessments where the likelihood is that multiple historical meanings are hidden rather than revealed. To address divergent values and respect difference, Australia ICOMOS developed the *Code on the ethics of co-existence in conserving significant places* (1998). In relation to the identification of values, the Code recognizes that conserving heritage places “requires acknowledgement of and sensitivity to the values of all associated cultural groups” (Article 3) and recognition that “each cultural group has a primary right to identify places of significance to it” (Article 4).

## **Methodologies and practices**

In Australia, the assessment of social significance is well embedded in heritage practice and listing/designation, particularly at the national level. Methodologies and significance indicators have been developed and refined, and there is continuing exploration of new ways to engage communities and cultural groups in this endeavor. Criteria and practical guidance on social value assessment exist in most jurisdictions today.

Three concepts underpin the social value concept in Australian practice: first that the value is contemporary, that is held by communities or cultural groups today; that the community or cultural group is particular and identifiable; and that continuity of use, association or meanings can be demonstrated, usually over a period of 25 years or more so as to represent the transmission of values beyond one generation.

Specific significance indicators are one of the tools used in the analysis of social value. Derived initially from *What is Social Value?* (Johnston, 1992), a more comprehensive set of indicators were developed to support a pilot project designed to identify social and other heritage values held by communities living and working in an extensive region (Johnston & Lewis, 1993). The project developed a relatively simple methodology – a community heritage workshop – later promulgated as an essential part of local heritage studies, and a framework for the assessment of social value. The workshop was designed to draw out information about places valued by the local community as represented by people at the workshop and sought to give “people a chance to share their knowledge, to learn about places important to others and to participate together in caring for heritage” (Australian Heritage Commission, 1988, pp. 50-53).

Three social significance indicators were established as part of the assessment framework:

- Important to a community or cultural group as a landmark, marker or signature
- Important as a reference point in a community's identity or sense of self
- Strong or special community attachment developed from use and/or association.

The assessment framework also elaborated each indicator, identified likely place types for each, and developed thresholds suited to applying the indicators in a regional-scale study. Following the pilot project, a program of community heritage workshops and the associated assessment framework was recommended for all ten regions, spanning five states, enabling testing of all the components, and confirming that social value could be confidently considered alongside the other heritage values (Johnston, 1994; Johnston, 2014 pp. 42-44).

Moreover, the pilot and the subsequent projects revealed a wealth of places that were important to each local community, adding substantially to what was known through previous heritage studies that adopted an expert-based approach. Further many of these places were demonstrated to hold social significance for their community. For example, the Bendoc Hall (East Gippsland, Victoria) is a small timber building typical of community halls built in many rural and remote communities; it dates from around 1925 and funds were raised locally to enable its construction. The hall became and remained an important centre of community life, as one of only two main community buildings in Bendoc, the other being the Union Church.

Bendoc Hall is significant as the community meeting and social gathering place for the Bendoc community for many years. Its longevity of use continues to the present (1994), and its role has created a special community attachment. Construction of this hall provides an association with the community of Bendoc. The relative isolation of the town further emphasises the community importance of this structure (Criterion G.1). (Australian Heritage Database, Place ID 101845).

Variations on these three indicators have emerged in some States: in New South Wales the adopted phrasing is "places held in community esteem" (NSW Heritage Office, 2001, p. 18) and in Queensland for example, the indicators are expressed as:

- important to the community as a landmark, marker or signature
- a place that offers a valued customary experience
- a popular meeting or gathering place
- associated with events having a profound effect on a particular community or cultural group
- place of ritual or ceremony
- symbolically representing the past in the present
- place of essential community function leading to special attachment (Queensland Heritage Council, 2006, pp. 58-60).

In the decades since, many techniques have been employed to engage with communities in identifying of social values, primarily adapted from ethnographic, group work and participatory approaches. Examples include walking the place and 'back-tos', small group discussions or focus groups, one-on-one interviews, questionnaires, and cultural

mapping. Increasingly online techniques are being explored as are analyses of image and textual data created on a variety of social media platforms.

Community activism is often a trigger for social value assessment. For example, in 2003, when a group of Nissen Huts in Wollongong (NSW), used from 1950-51 as the first accommodation places for newly arrived migrants were proposed for removal, a local heritage group convened a public meeting at which the importance of community connections to these buildings became apparent, resulting in intensively lobbying for their retention. A subsequent study initiated by the locally based Migration Heritage Project, documented these connections through a program of historical research and community interviews (Walker, 2007). As a result, both the buildings and their location were recognised as having "social significance due to the community of past residents and their descendants who have strong emotional ties to the site and still live in the Wollongong district" with the demonstrated esteem for these buildings considered to be evident through the work of the Migration Heritage Project (NSW State Heritage Register, 2016).

While workshops with a diverse range of community representatives and interests are still a valuable way to identify places of importance across a region, the concept of an 'affinity group', that is people with shared interests and experiences is now commonly used to discern the values within specific communities or cultural groups. The genesis for a project to investigate social and aesthetic value of the Upper Mersey Valley (Tasmania), a remote World Heritage area listed for its natural OUV, came from those whose cultural activities and structures were being threatened with removal because they were seen as impacting on these natural values (Russell, Cubit, Johnston, & Hepper, 1998).

With a community member as co-researcher, and in consultation with a range of community leaders, informal gatherings were convened, each comprising people who shared a common interest. These 'communities of interest' were self-defined with participants chosen by a key person within that community. The identified communities of interest were linked to the cultural activities at risk: hunting, fishing, cattle grazing, bushwalking, horse riding, forestry/sawmilling and huts. A benefit of this affinity group approach was that familiarity and camaraderie between group participants helped to deepen the engagement and avoided possible conflict.

Each group met at a place of their choosing, spending time reflecting on the areas they knew within the Upper Mersey Valley, creating powerful visual images through the telling of stories that transported the group imaginatively to the place. Large maps of the area were marked to show their perception of the boundary of the valley, the areas those participants had used or continued to use, travel routes and other known features. A second map and collective discussion revealed which places were of the greatest importance to the identity of each community of interest. The process also allowed the researchers to identify the expressions of social value being used by each group, creating more specific and culturally relevant significance indicators rather than simply the standard indicators, building an understanding of what the terms social significance and aesthetic significance might mean within these communities of interest (Russell & Johnston, 2002, pp. 2-3). As a result, the following specific expressions or indicators were distilled from participants own words, and offered back to them for review before being applied:

**A different way of life:** A special place, beyond civilisation and not like “home”, and yet a place that welcomes you back. It’s a different way of life. A challenging environment; familiar but never safe.

**Symbols:** Places that symbolise what this community stands for and cares about.

**Bringing history alive:** Places that bring history alive because of what we know about the past and because of our own experiences there. Some places recall generations of people who’ve lived and worked there.

**Stories and legends:** Place names and the places themselves help recall stories and legends about individuals and families, past events, tragedies and exploits. These stories are written in the landscape for those who know where to look.

**Landmarks and stopping places:** These mark the journey into the Mersey Valley. They are at the heart of knowing where you are – and even who you are. It’s almost a spiritual journey.

**Lookout points:** Places where you can see beyond – to see the vastness of the landscape and to see what is happening elsewhere.

**Familiar and favourite places:** Places that are or have been part of our lives over many years; the places you come back to time and time again.

**Personal places:** Places special to me that perhaps no one else knows about. (Russell & Johnston, 2002, pp. 4-5).

While perhaps not true example of participatory action research where ‘communities of inquiry’ are co-researchers, leading the shaping of questions and the actions to be taken, this project was a clear step in that direction and one of few such examples with a non-Aboriginal community.<sup>8</sup>

An analysis of the social and community-held aesthetic values of the City of Broken Hill in 2009 was influenced by rapid ethnographic assessment procedures (REAP) (Taplin, Scheld & Low, 2002, p. 80). Recognizing the challenge of assessing the social and community-held aesthetic values across a whole city for the National Heritage List, the project adopted two REAP techniques: triangulation, that is the use of multiple methods and datasets to increase the reliability of the data, and iteration, the progressive development and refinement of research and data gathering. The approach included an analysis of public art imagery, public commemoration language, a review of artistic and literary sources, web-posted snapshots, the city’s promotional imagery, interviews and importantly an online questionnaire directed to the city’s communities (Johnston, 2016, pp. 28-31).

In Ballarat, another suite of methods is being applied. The City of Ballarat has signed up to be part of an international pilot with UNESCO’s Historic Urban Landscapes (HUL) program, recognizing that their communities love far more about their city than just the buildings and streetscapes that were identified in the heritage studies undertaken in past years, and that change and loss was a significant community concern (City of Ballarat, n.d., Historic urban landscape). The HUL project built on a far earlier initiative to investigate what aspects of cultural heritage are important to this community through a project in Ballarat East (PLACE Inc, 1993). Using mapping workshops, and engaging

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<sup>8</sup> Co-research methods are more common with Aboriginal heritage work, particularly in field of community archaeology, but overall expert-lead methods dominate.

artists in an interpretive and creative role, a synthesis of values emerged, some mapped to specific locations, and others expressed in text and poetry. Comparing the results to earlier heritage studies revealed a distinctly different pattern of values and again demonstrated how a simple process enabled community values to be revealed. Currently the City of Ballarat is again pursuing a mapping approach using a purpose-designed web tool Time Capsule. In mapping a place, the tool invites the user to share images and text that express stories and experiences, and then asks some simple questions about the importance of the place to that user (City of Ballarat, n.d., Places).

The Port Arthur Historic Site in Tasmania, now part of the Australian Convict Sites World Heritage serial listing, is a well-known example of values-based management, largely as a result of the GCI values project (Mason, Myers & de la Torre, 2003). Port Arthur was a town for longer than it was a penal institution, and a tourist destination and designated historic site for longer still. But it was in 1973 when the local Council moved their offices from Port Arthur that the community's displacement from their town became real; residential occupation of buildings on the site was prevented, and conversion to a heritage site started in earnest. While the residents did not move far and many retained significant connections with the site, a new community of heritage experts moved in.

When a Conservation Plan was proposed for Port Arthur, social value was one of the aspects of cultural significance required to be assessed. Because Port Arthur had been designated as a historic site in the 1970s, relatively early in Australian terms, it was also a place where many people had gained their early professional experience as the heritage profession was creating itself. Heritage professionals were therefore identified as one of the associated communities. The others were a series of distinct but overlapping communities: Australians, Tasmanians/Aboriginal Tasmanians, Tasman Peninsula residents, those connected with the 1996 tragedy, and descendants of the convicts, military and officials and their families who lived at Port Arthur. A wide net to cast, with the expectation of divergent and potentially conflicting values.

The heritage community was defined as comprising the many people in Australia whose professional lives had brought them to work, reflect and critique the efforts to conserve the Historic Site, including present and former staff across several management eras, members of key heritage agencies and professional groups, consultants and researchers and they represented a wide range of disciplines. Through a focus group, questionnaire and interviews the consultant team came to appreciate that "heritage professionals 'own' Port Arthur. For them it is and has been a heritage training ground, and a focal point for discussions about heritage management. There are very strong opinions about Port Arthur" (Context Pty Ltd, 1998, p. 30).

Ultimately the Conservation Plan expressed social value for the heritage profession in the following terms "Port Arthur is a symbol of modern heritage practice in Australia – an expression of how we care (or don't care) about our heritage. It holds an important place in the history of modern heritage conservation in Australia" (Godden Mackay Logan & Context 2000). Interestingly, it fails to capture the sense of emotional connection referenced above from an internal team report.

Several years' prior, following the 1996 shootings at Port Arthur and an outcry over the almost immediate demolition of the Broad Arrow Café, the site of twenty deaths, Jane Lennon was commissioned to undertake an urgent assessment of the heritage values of

the café. Her work represents one of the earliest Australian studies of what she termed “negative social value” (Lennon, 1998).

The Conservation Plan framed this community as the ‘tragedy community’, adopting the term used locally to describe the event (avoiding the use of the phrase ‘Port Arthur massacre’ which was how it was known on the Australian mainland) and drawing extensively on Lennon’s study and other writings. The tragedy community was considered extensive, probably including “virtually everyone on the Tasman Peninsula who directly experienced these events, who knew someone who was killed, injured or threatened and who continue to live with the consequences. The tragedy community extends well beyond the Peninsula to the many Tasmanians who also shared these same direct connections with this event. Like a stone falling into a still pool, the ripples have extended to every corner of Australia, perhaps resulting in a reshaping of many Australians’ understandings of and feelings about their own experiences of Port Arthur” (Context Pty Ltd, 1998, p. 29).

Lennon’s work revealed that prior to the tragedy, the Broad Arrow Café had minor value to the local community for its earlier use as a recreation building. The tragedy transformed the meanings of the Café for locals and Australians alike. For some of those interviewed, Lennon suggested that the Broad Arrow Café now had negative social value, in that it provides a “constant visual reminder [...] (that) can trigger strong feelings of depression and of insecurity”. These feelings were expressed by a number of PAHSMA staff and locals, and many wanted the building demolished or at least screened. For others, these new and tragic meanings associated with the Broad Arrow Café suggested the opposite, that there was a need to retain the evidence of the building.

The statement of significance resulting from this work reads:

The Broad Arrow Café has cultural significance primarily for its social value as a place of remembrance of those who died and were injured in the tragedy. For survivors, friends, relatives and others touched by the tragedy, the place has become a memorial evocative of the events of 28 April 1996. (Lennon, 1998).

The memorial cross also became an important symbol. Created by a local artist and erected at a national memorial service on 20 May 1996, it served for some years as “a place of remembrance for visitors who pause there on their tours of the Historic Site, and for the relatives and friends of the deceased who place floral tributes at the base of the cross” (Lennon, 1998). In the social value interviews and focus groups conducted as part of the Conservation Plan, the memorial cross was often commented on. For some, it clearly represented survival and the start of a healing process, whereas the Café represented brutality and death. But for others, the location of the memorial was troubling; it was seen as an intrusion into the historic core and a distraction from the convict focus. Ultimately, however, the presence of the memorial cross in the main view lines across the site combined with the challenge of responding to visitors’ questions became too painful, and one night the cross was moved by persons unknown to a new location within the memorial garden, where it remains today.

## **Issues in practice**

Having looked at a few selected examples of how social value is being approached in Australian heritage practice, and thereby illustrating the breadth of its application and



some of the methods and techniques being applied, what challenges are being faced today? Three key issues are apparent: the extent to which social value is actually addressed in heritage practice, the relationship between social value and a broader concept of community values, and continuing professional discomfort with a heritage that appears far too mutable and is still unfamiliar.

### *Marginalized and avoided?*

Given that Australian heritage practice may be leading in the realm of social value assessment, it is important to ask to what extent social value is addressed? Can we see any changes in practice over time, and what is the quality of the research that underpins assertions of social value? Byrne *et al.* wrote in 2003 that 'in the great majority of heritage assessments carried out over the last 30 years, the category of the social has been treated by heritage professionals in Australia as dispensable altogether' (2003, p. 7). Fredheim *et al.* (2016) concurs, and proposes to avoid the category of 'social value' or 'communal values' in a values typology because, in his view, while these appear to be 'non-expert values, the inclusion of these categories has tended to separate and marginalize these values in practice' (referencing Byrne *et al.*, 2003; Waterton & Smith, 2010).

As there has not been a detailed examination of the extent or quality of social value assessments in Australia, the best evidence may be provided through listings and in guidance documents. For example, reviewing the then national heritage list (the Register of the National Estate), Purdie (1997, p. 32) identified 350 places tagged against the social value criterion in 1994 (comprising 3.3% of all listed places). Purdie noted the rapid take-up of this concept since the Commission started to compile its register in 1976, and that the active development and testing of methods as being well underway (Purdie, 1997, pp. 42-43). By 2007, when the Register of the National Estate was closed, similar search revealed 711 entries (5.2% of all listed places), with a current count of around 1051 places (4.7%) social value mentioned in the citation on the Australian Heritage Database (a compilation of national heritage lists including the RNE). As this simple count shows, recognition of social value appears to have remained relatively static.

However, the 2011 State of the Environment Report examined additions to the State heritage registers across Australia over a twelve-month period (2009-10), and identified that the second most used criterion was that related to social value, representing 27% of the additional listings (State of the Environment 2011 Committee, 2011, p. 709).<sup>9</sup> This may reflect growing interest in and confidence with social value assessment. The relatively newly created National Heritage List also offers a more optimistic picture, with 28% of the 107 places listed referencing social value and many of the assessments demonstrating a significant commitment by the national government to investigating this aspect of significance.

Where social value is asserted, is there a sound foundation of research and engagement with the values-holders, that is, the associated communities? Again the answer is yes and no. As a consequence of limited budgets and probably also the skills in assessment teams, many broad scale heritage studies do not engage with local communities at all,

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<sup>9</sup> There are eight fairly standard criterion used across Australia; these are known as the HERCON criteria and derive from the criterion developed by the AHC for the Register of the National Estate.

or if they do, the engagement is very limited. At times, the solution proffered is a generic statement such as 'the church is of social significance to its congregation and the local community', a statement that is probably true but offers no guidance when a change is proposed. Instead, one needs to ask, what aspects of the church are of social significance - the whole building, its setting, its use as a church, certain rituals and celebrations? Only then are we respecting the promise of values-based management.

### *Discomforting heritage*

Are social values fluid? And even if they are, does it matter? And if professionals in heritage practice are not engaging with social value, why not? Johnston (2014, p. 39) asserts that:

Social significance is still problematic for some heritage professionals and decision-makers. The effort that needs to go into understanding the relationships between people and place is seen as a distraction from "real" conservation, that of the fabric. Yet it is these relationships that are truly fragile and so often at risk, especially from government. And once gone, they may be hard to recover.

Comfort and familiarity may be equally important factors, with other methods being much longer established, meaning a greater degree of professional comfort in using them (Jones, 2016, p. 4). And perhaps engaging with communities means that heritage professionals fear their expert status will be threatened, or that they do not have the expertise needed to work in this domain. Certainly there are relative few heritage professionals who are trained in the social science and participatory methodologies. On this basis, the potential for a shift to participatory and collaborative practice - the co-creation of understandings of value - seems well out of reach despite this being the logical next step in the shaping of social value assessment practice (see for example Scheld, Taplin & Low, 2014, p. 55).

The perception that social value is highly fluid and 'more transient' may be another reason why it remains at the margins of practice (Jones, 2016, p. 4). This is a perennial issue for social value, and has been raised regularly, including in the first Australian Heritage Commission paper on the subject (AHC, 1988). The idea that all heritage values are social constructs and may change over time and vary between individuals and groups, is fundamental to a contemporary understanding of heritage. While this is well accepted in academic writing, it is not as widely shared across those involved in practice.

On the question of the mutability of values, Fredheim and Khalaf (2016, pp. 472-474) point out that 'time and change' are not well considered in practice guidance, citing the Burra Charter (Australia ICOMOS, 2013) and English Heritage's Conservation Principles as examples of internationally well-regarded guidance that seems to overlook these elements (English Heritage, 2008, p. 470). Posing the question, how would we treat two values assessments, one undertaken now and one twenty years into the future, Fredheim and Khalaf (2016, p. 470) suggest that assessments need to be time- and context-specific, and that assessment processes need to consider how a past assessment relates to one made in the present. Referring to Stephenson's Cultural Values Model (2008) they suggest that the concept of embedded values compared to surface values offers one way of responding to this question, as 'Over time, surface values may become

embedded, giving past interpretations of significance a role in the present' (Fredheim & Khalaf, 2016, p. 472).

To my knowledge there have been no longitudinal studies of heritage values that examine the extent of change in identified values over time, and the approach suggested by Fredheim and Khalaf (2016) warrants exploration. There are numerous examples where an earlier assessment has been reviewed in the light of a shift in cultural perspectives. This can be seen in the development of Retrospective Statements of Outstanding Universal Value (RSoOUV) to encompass newly recognized heritage values such as in currently underway in relation to the Tasmanian Wilderness World Heritage Area where Aboriginal values are now being assessed at the behest of the World Heritage Committee.

### **Does social value narrow the domain of community heritage values?**

Does social value encompass all of the heritage values that may be held by a community? Johnston (1992, p. 10) suggests that social value and the attributed meanings are "in addition to other values, such as the evidence of valued aspects of history or beauty". However, because the relevant criterion is only one of two include the phrase 'community or cultural group'<sup>10</sup>, it seems plausible that other community values are ignored or seen as irrelevant, and therefore are rarely sought out in local heritage studies for example.

Byrne *et al.* (2003, p. 7) sought to change the values paradigm, proposing that rather than seeing social value as one of four values<sup>11</sup>, it should become an all-encompassing value because 'the entire heritage process is located within a society' and the other three values – aesthetic, historic and scientific – can only exist within 'society' that is, they are subsidiary to social value. His proposed model, however, does not appear to increase the likelihood that direct community relationships with place would be given greater recognition or respect (Byrne *et al.*, 2003, p. 8). Given that this model was not adopted, the argument is theoretical.

In a way, the simplest approach is to ask 'who holds which values' for any place, recognising that each community or cultural group may hold distinct and different values for a place as may any individual or expert group. The phrase 'locally constituted meanings' (Jones, 2016, p. 5) offers another path, recognizing that values and meanings are composed at many levels and by a variety of actors, and that who holds the values should form part of any values analysis. In Australia, this is done for social value, but not for the other values, and is clearly a deficiency in current practice.

### **Conclusions**

This paper has explored social value as part of values-based heritage practice. Social value remains:

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<sup>10</sup> The phrase 'community or cultural group;' is included in the criterion relevant to social value and aesthetic value at the national level but only used in relation to social value by the States and Territories.

<sup>11</sup> Note that since 1999, the Burra Charter has recognised five values – aesthetic, historic, scientific, social, spiritual (Australia ICOMOS, 1999).

Fundamental to heritage as it is understood and lived by Australia's diverse cultural groups and local communities. Assessing social value emphasises aspects of living cultures rather than dead fabric, links between natural and cultural environments, and the intense relationship of Indigenous cultures to the land (Blair, 1994, in Purdie, 1997 p. 32).

The recognition of social value has endured since it was first promulgated in the early 1990s, but even so it is not universally practiced. There remains resistance in some quarters, and enthusiastic take-up in others. Internationally, the scene is set for an expansion of activity, probably within 'people-centered approaches' being advanced through UNESCO and the WHC. The Australian conception of social value may prove attractive, as is indicated by Jones and Leech (2015), but equally other ideas may come to the fore, especially from parts of the world where European paradigms of heritage are less dominant and community-inclusion is part of public policy.

The development of social value as a concept in cultural heritage practice, and then in the development of methodologies to document and assess social value of a place and its meaning to a community or cultural group has been a part of a broadening of how heritage is understood; it has been and continues to be part of the shift in the heritage discourse from the narrowly conceived notion of a monument important for its authentic fabric to what is now a broad field of critical enquiry.

In conceptualising social value, new ideas were able to be expressed within heritage practice, ultimately opening the door to new ways of working, extending opportunities for other disciplines and skills to participate. In Australia, consideration of social value is well embedded in national heritage listing and associated management planning, but this represents only a small percentage of the effort devoted to heritage identification.

Ultimately we will all be the beneficiaries of these changes. It will help fulfil the very human desire for recognition, for a place in the world and for that intimate conversation that we each have with our valued places, stories, practices and people.

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