

## *Example 1 - Letter of Intent and TG Proposal*

### **RecorDIM Initiative Letter of Intent**

Date: September 25, 2003

From: Name: Natalie Bull  
Title: Director  
Division: Heritage Conservation Professional & Technical Program  
Organization: Public Works & Government Services Canada (PWGSC)

To: Robin Letellier  
International Coordinator  
RecorDIM Initiative

#### **Subject: Proposal for the Creation of RecorDIM Information Warehouse Task Group**

This letter of intent is to confirm our interest in the RecorDIM Initiative and to propose a **RecorDIM Task Group** to address the **gap** related to the need for sharing and disseminating RecorDIM information worldwide.

Heritage Conservation staff within PWGSC will chair and manage the activities of this task group as defined in appendix A. The RecorDIM Task Group Operational Framework provided under 'Task Groups' (see RecorDIM website), will be used as a guideline for this activity.

We understand that, by undertaking this task group responsibility, PWGSC becomes a partner in this initiative, and that this Task Group definition and its eventual outputs will be posted on the RecorDIM web site.

We thank you for the opportunity to participate in this initiative, which dovetails with key initiatives being undertaken in PWGSC. We believe that the network of RecorDIM Partners and their task group outputs will benefit conservation practices in PWGSC, and worldwide.

Natalie Bull  
Director  
Heritage Conservation Professional & Technical Program  
Public Works & Government Services Canada (PWGSC)

## Appendix A

### ***RecorDIM Information Warehouse - Task Group Proposal***

**Task Group Name / Title:** **RecorDIM Information Warehouse**

Co-Chairs:

- Andrew Powter, co-chair, Heritage Conservation Professional & Technical Program; PWGSC
- Chris Ouimet, co-chair, Heritage Conservation Services, PWGSC

Information User representative: : (to be confirmed at Antalya Roundtable)

Organization: (to be confirmed at Antalya Roundtable)

Information Provider representative: (to be confirmed at Antalya Roundtable)

Organization: (to be confirmed at Antalya Roundtable)

#### **Project Outline**

RecorDIM Initiative participants, property management organizations and conservation organizations at large will be invited to share existing information / web links that relate to RecorDIM activities. These links will be posted by the Getty Conservation Institute webmaster on the **RecorDIM** website under one of the following topics:

- Policies
- Guidelines
- Standards
- Inventories
- Processes
- Handbooks
- Tools
- Software
- Training
- Best Practices

These topics are based on the RecorDIM Initiative Roundtable-1 list of gaps and needs. It should be noted that this list is preliminary and will be refined by the task group participants as appropriate.

The purpose of the **Information Warehouse** is to provide those interested in creating RecorDIM Task Groups with knowledge of existing documents / web pages that are relevant to RecorDIM principles, practices, tools and technologies. Some of the warehouse **objectives** are:

- to provide conservation specialists worldwide with a **'one stop' web site** for information on RecorDIM topics listed above;
- to compile under each RecorDIM topic listed above, as many references as possible for Conservation Organizations that wish to develop RecorDIM practices in their country;
- to provide information on new RecorDIM practices, tools and technologies, as soon as it is made available.

### **Proposed Methodology for Task Group (to be discussed with Partners in Antalya)**

1. Discussion at Antalya to confirm interested partners, user representative(s), provider representative(s).
2. Dissemination of an e-mail notice identifying the Information Warehouse Coordinator (Chris Ouimet/Andrew Powter) and the RecorDIM initiative; requesting information, references, web links to applicable documents (Policies, Guidelines, Standards, Inventories, Processes, Handbooks, Tools, Software, Training, Best Practices)
3. Receipt and review/vetting of proposed web links
4. Posting of link between the RecorDIM web site and other web pages containing relevant RecorDIM information.
5. For documents that are not yet posted on the web, they will be encouraged to arrange for a site / server to post their information. Then, they can request that a link be made with the RecorDIM Information Warehouse.
6. Documents that are not in electronic format will be included as a bibliographic reference with information on how to obtain copies.
7. An example of an Information Warehouse link is suggested:

#### **Topic: Guidelines**

##### **Federal Heritage Buildings Review Office (FHBRO) code of practice**

- *(note: a brief introduction to the document should be provided here, by the sender, explaining why this link is being provided)*
- Go to Parks Canada's URL: <http://www.parkscanada.ca/> to access the **Federal Heritage Buildings Review Office (FHBRO) code of practice document**.
  - Instructions:
    - Click 'English'
    - Click 'National Historic Sites of Canada'
    - Click 'Federal Heritage Buildings Review Office'
    - Click 'FHBRO Code of Practice'
    - Click 'Realty Management'
    - Click '**Recording To Mitigate Loss Or Transfer**'

**Deliverables:**

This task group will produce an open-ended collection of focused web links that will be made available on the Getty Conservation Institute's server to provide readers with information relevant to the above listed RecorDIM topics.

This interactive collection of information will grow with the interest / motivation / generosity of those sharing / using RecorDIM related data.

**Project Resources** (that have been secured for this task group):**- Person-days**

PWGSC staff are prepared to commit 11 days of staff time to this initiative in 2003/2004 (9 days from Heritage Conservation Services; 2 days from Heritage Conservation Professional & Technical Program). This time will include:

- o Overall coordination of the task group
- o verifying the topic and pertinence of links / documents sent to be posted;
- o verifying the copyright agreement;
- o arranging with the Getty Conservation Institute for posting the link / document to the Information Warehouse web page.

**- Budget**

There are no anticipated expenses for participants, aside from staff time to participate.

It is our understanding that the potential cost of additional hard disk storage space has been recognized by the Getty Conservation Institute and would be covered should the need be confirmed.

**Task Group Team Members/contributors (to be discussed/confirmed at Antalya)**

- John Bell, Jean-Pierre Jerome, Peter Sawyer – Information Providers - Heritage Conservation Services, PWGSC
- CIPA (to be confirmed)
- ICOMOS (to be confirmed)
- GCI (to be confirmed)
- WMF (to be confirmed)
- ICCROM (to be confirmed)
- ICOM (to be confirmed)

**Milestones:**

- Starting date: [October 2003](#)
- Mid-project review date (by RecorDIM Liaison Officers): [Spring of 2004](#)
- Completion date: [on-going activity \(but bulk of work expected to be complete by Spring 2004\)](#)

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[Task Group Co-Chairs](#)

date: \_\_\_\_\_

## *Example 2 - Letter of Intent and TG Proposal*

### **RecorDIM Initiative Letter of Intent**

Date: September 25, 2003

From: Name: Natalie Bull  
Title: Director  
Division: Heritage Conservation Professional & Technical Program  
Organization: Public Works & Government Services Canada (PWGSC)

To: Robin Letellier  
International Coordinator  
RecorDIM Initiative

**Subject: Proposal for the Creation of a RecorDIM Task Group on Integrating Heritage Recording into Property Management and Project Delivery Practices**

This letter of intent is to confirm our interest in the RecorDIM Initiative and to propose a **RecorDIM Task Group** to address the **gap** identified by RecorDIM partners related to the need to integrate heritage recording, documentation and information management into the conservation process - but ultimately, into the way owners and organizations manage cultural property. Note that from a PWGSC's perspective, the results of this task group will be instrumental in developing a Business Case and draft policy for integrating heritage recording/documentation/information management into its overall property management and project delivery processes which apply to heritage and non-heritage property. We believe all organizations who manage/own cultural property could benefit from these results.

Heritage Conservation staff within PWGSC will chair and manage the activities of this task group as defined in appendix B. The RecorDIM Task Group Operational Framework provided under 'Task Groups' (see RecorDIM website), will be used as a guideline for this activity.

We understand that, by undertaking this task group responsibility, PWGSC becomes a partner in this initiative, and that this Task Group definition and its eventual outputs will be posted on the RecorDIM web site.

We thank you for the opportunity to participate in this initiative, which dovetails with key initiatives being undertaken in PWGSC. We believe that the network of RecorDIM Partners and their task group outputs will benefit conservation practices in PWGSC, and worldwide.

Natalie Bull  
Director  
Heritage Conservation Professional & Technical Program  
Public Works & Government Services Canada (PWGSC)

## Appendix B

### ***Integrating Heritage Recording into Property Management and Project Delivery - Task Group Proposal***

**Task Group Name / Title:** **Integrating Heritage Recording into Property Management and Project Delivery**

Co-Chairs:

- Natalie Bull, co-chair, Heritage Conservation Professional & Technical Program; PWGSC
- John Bell, co-chair, Heritage Conservation Services, PWGSC

Information User representative: Caroline Alderson

Organization: [US Government Services Administration](#)

Information Provider representative: [\(to be confirmed at Antalya Roundtable\)](#)

Organization: [\(to be confirmed at Antalya Roundtable suggest English Heritage\)](#);

#### **Project Outline**

One of major challenges facing PWGSC, and likely all custodians of property, is to convince decision-makers to invest in the recording/documentation of heritage buildings. This activity is often seen as a luxury that is not given priority in planning and budgeting. However, we know that most custodians of 'non-heritage' property have established standards and budgets for collecting and managing documentation about their buildings and sites, ranging from simple collections of base building drawings, to complex geomatics systems that link land surveys, drawings, images, and text.

It is possible that advocates of heritage recording (both users and providers) fail to adequately describe the benefits of heritage recording in a language that is readily understood by property managers and project managers outside the conservation community.

It is also possible that by understanding the property manager's approach to documenting and recording "non-heritage" buildings, we can tap into existing policies, programs and funding sources and increase the amount of recording completed for heritage property.

The goal of this task group is to compare and contrast how various organizations collect, record, manage and use information about property, and to identify the differences, and similarities, in information that is produced and used to manage "non-heritage" property as compared to "heritage" or "cultural" property. The focus is on public sector organizations, but it is expected that the results will be of interest to private sector owners as well.

This international task group will consist of representatives from the users and producers of building and site documentation from 'heritage' and 'non-heritage' milieus, as well as specialists in property management and project delivery who work with both 'heritage' and 'non-heritage' property. Participants will be invited to share responses to the following questions (draft; to be refined by task group partners):

1. Does your organization manage/own cultural/heritage real property?
2. Does your organization manage/own non-cultural, non-heritage real property?
3. Does your organization have a policy stating its approach to documenting and recording cultural/heritage property?
4. Does your organization have a policy stating its approach to documenting and recording non-heritage, non-cultural property?
5. Does your organization have in-house specialists in documenting property? Do these specialists record both heritage and non-heritage properties?
6. Does your organization hire consultants and contractors to record and document its heritage properties, and/or its non-heritage properties? If so, how do you describe the level of accuracy and level of detail required?
7. How do you control and evaluate the quality of the recording and documentation you receive from consultants and contractors?
  - Describe your organizations systems and requirements for collecting and managing information about its property: non-heritage property, as well as heritage property. Are the requirements and systems identical for both non-heritage and heritage property? If not, how and why are they different?
  - What is your organization's annual investment in documentation and heritage recording its properties? Can you compare the investment per heritage building; per non-heritage building?
  - Can you share a case study demonstrating the cost and benefit of heritage recording/documenting a building? (e.g., usefulness of heritage record for property management purposes, for project development purposes, etc.).

#### **Proposed Methodology for Task Group (to be discussed with Partners in Antalya)**

8. Discussion at Antalya to confirm interested partners, user representative(s), provider representative(s).
9. Review of proposed questions above.
10. Dissemination of an e-mail notice identifying the task group coordinators and describing the RecorDIM initiative, and including a questionnaire made up of the above questions.
11. Teleconferences with partners to discuss the questions and develop responses.
12. Collection and organization of responses from all participants into a report with observations and recommendations, to be presented to all RecorDIM partners and posted on the RecorDIM website.

#### **Deliverables:**

This task group will produce a report with recommendations that will be made available on the Getty Conservation Institute's server.

Note that from PWGSC's perspective, the results of this task group will be instrumental in developing a Business Case and draft policy for integrating heritage recording/documentation/information management into its overall property management and project delivery processes which apply to heritage and non-heritage property. We believe that all organizations who manage/own cultural property can benefit from these results.

**Project Resources** (that have been secured for this task group):

- **Person-days**

PWGSC staff are prepared to commit 16 days of staff time to this initiative in 2003/2004 (4 days from Heritage Conservation Services; 6 days from Heritage Conservation Professional & Technical Program; 2 days Geomatics, 2 days Asset & Facility Management, 2 days from Project Technology/Project Leadership).

PWGSC is hoping to confirm commitments from other RecorDIM partners at the Antalya Roundtable.

- **Budget**

There are no anticipated expenses for participants, aside from staff time to participate.

**Task Group Team Members/contributors (to be discussed/confirmed at Antalya)**

- Jean-Pierre Jerome, Peter Sawyer – Information Providers - Heritage Conservation Services, PWGSC
- CIPA (to be confirmed)
- ICOMOS (to be confirmed)
- GCI (to be confirmed)
- WMF (to be confirmed)
- ICCROM (to be confirmed)
- ICOM (to be confirmed)

**Milestones:**

- Starting date: [October 2003](#)
- Mid-project review date (by RecorDIM Liaison Officers): [Spring of 2004](#)
- Completion date: [Summer 2004](#).

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[Task Group Co-Chairs](#)

date: \_\_\_\_\_