

# Cultural Heritage Integrated Management Plans

Thematic Report (4)



Based on the results of the Hero meetings in

- Vilnius, 09.-11.05.2010
- Valletta, 08.-10.11.2009
- Graz, 19.-20.03.2009
- Poitiers, 04.-05.12.2008

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## 1 Introduction

At the kick-off meeting in Poitiers, France, 04.-05.12.2008, the 2<sup>nd</sup> meeting in Graz, Austria, 19.-20.03.2009, and the 3<sup>rd</sup> meeting in Valletta, Malta, 08.-10.11.2009, the HerO partners met to elaborate a common understanding of a “Cultural Heritage Integrated Management Plan” (CHIMP) and exchanged experience about the development and elaboration of CHIMPs: Objectives, requirements, structures, field of actions, operational and organisational procedures as well as the elaboration and content of the implementation-oriented action plan were discussed.

The **meeting in Vilnius, Lithuania, 09.-11.05.2010** focused on the issue of visual Integrity of historic urban landscapes. One session was done about Monitoring in support of the implementation of CHIMPs and how the Local Support group could be involved in this.

This ‘Thematic Report’ (4) documents the results of that session and updates the 3<sup>rd</sup> thematic report (3.0), containing the **new component**

– 4.3 Review - Monitoring, p.16-21.

All presentations, held during the four meetings in Poitiers, Graz, Valletta and Vilnius can be downloaded from the HerO website: [www.urbact.eu/hero](http://www.urbact.eu/hero).

In the name of the Lead Partner, we would like to thank sincerely Gediminas Rutkauskas and Jurate Raugaliene and their organising team for hosting the 4<sup>th</sup> meeting and organising it so well. We are sure the participants will keep Vilnius in good memory and will return some day.

We thank all participants very much for their participation and we look forward to our next meeting in Naples in November 2010.



## 2 Cultural heritage integrated management plans: Introduction

### 2.1 Background

Historic urban areas face – besides the “ordinary” challenges of cities – the peculiar **challenge** to find the appropriate balance between the needs of the (tangible) cultural heritage and needs of today’s and future “users” of historic urban areas. There is a conflict of the proper safeguarding of the cultural heritage as witness and symbol of our history, as part of our identity and the nowadays and future needs of a future-oriented urban development of our historic urban areas (responsible handling of what we have inherited and responsible handling of what we will inherit). An unbalanced handling of this “conflict” can lead to a loss of cultural heritage values and identity or economic stagnancy and non-competitive historic urban areas with low amenity values.

The challenge is to ‘**Safeguarding the Past – Facilitating the Future**’.

Dealing with historic urban areas implies particularly to deal with **problems** of *(subtotal)*

- Insufficient maintenance and decay of cultural heritage and historic urban landscape *(because of lack of investments)*;
- Improper rehabilitation of the cultural heritage *(because property owners are not aware about the heritage value, lack of knowledge about proper rehabilitation, lack of funding)*;
- Inappropriate new developments not respecting the cultural heritage landscape;
- Migration and vacancies due to reduced (socio-economic) attractiveness *(lack of commercial activities and economic opportunities, out-dated infrastructure)*;
- Demolition of tangible cultural heritage and parts of the historic urban landscape due to economic pressure *(lack of suitable structure and lack of extension possibilities for businesses and economic activities)*;
- Invasion of mass tourism, crowding out inhabitants (functions) *(mono-structured historic urban area)*;
- Traffic congestion and pollution of historic urban area *(due to small scale structures)*;
- Inhabitant needs for more recreational and green space, parking in front of the door, etc. *(because of high density)*.

But the safeguarding of the **cultural heritage** is not only a “problem” to deal with; the cultural heritage is also an **asset** (hard and soft location factor) which can support a sustainable urban development, **encouraging investments and growth**. This can not be achieved by traditional, uncoordinated mono-sectoral policies.

It **demands an integrated approach and management system** to be capable to deal and manage successfully with the different demands of and towards the historic urban area. Such an approach has to link the safeguarding of the cultural heritage with the socio-economic and environmental development of the historic urban area to develop and secure dynamic, attractive and competitive economic, social and cultural centers.

An **appropriate instrument** for it can be “**Cultural heritage integrated management plans**”, which will be developed in the HerO partner cities during the lifetime of the network.

## 2.2 Working Definition

A “Cultural heritage integrated management plan” (CHIMP) is an innovative instrument to effectively manage the sustainable safeguarding and development of historic urban areas and their cultural heritage to attractive, competitive and multifunctional places. It balances and coordinates the cultural heritage needs with the needs of the (manifold) “users” of the historic urban area and the responsible governmental bodies (demands of and towards the historic urban area and its cultural heritage).

Thus, a Cultural heritage integrated management plan determines and establishes the appropriate strategy, objectives, actions and management structures to safeguard the cultural heritage, to balance the different needs and to use historic urban areas and its cultural heritage as development asset.

## 2.3 Objective

A Cultural heritage integrated management plan aims

- to safeguard the cultural heritage values of a place;
- to develop and ensure attractive, competitive and multifunctional historic urban areas;
- to balance and manage the demands and needs of the tangible cultural heritage (safeguarding it) and of the “users” of historic urban areas (future-oriented development), using the integrated and management approach.
  - ▶ Considering all dimensions of urban life;
  - ▶ Involving and coordinating all relevant public and private stakeholders;
  - ▶ Coordinating sectoral policies, concepts, plans, actions, etc. which are directed or affect historic urban areas and their cultural heritage;
- manage and balance conflicting uses/ functions and the different demands of “users” of an historic urban area: local economy, citizens, tourists, property owners, conservators, etc.;

## 2.4 Requirements

A Cultural heritage integrated management plan (CHIMP) requires two methodological approaches, which have to be developed and implemented within such a plan:

- [Integrated Approach](#)
- [Management System](#)

From these two methodological approaches derive certain requirements towards a CHIMP (*for further explanations on the “Integrated Approach” and “Management Systems”, see the glossary, p. 22ff*).

### 2.4.1 **Integrated approach**

The Integrated approach within the CHIMP serves in the first place to link, balance and coordinate the needs of the tangible cultural heritage with the with the socio-economic and ecologic needs of the (manifold) “users” of the historic urban area. Further the integrated approach can be used as a vehicle to take the cultural heritage as cross-sectional task for the sustainable development of the area (cultural heritage led urban development).

Based on the two main characteristics of an integrated approach, following requirements derive for a CHIMP:

### 1. Comprehensive, cross-thematic and cross sectoral

- ▶ The CHIMP has to consider, balance and coordinate all dimensions of urban life of the historic urban area: as place to live, to work, to relax, to shop, to invest and to safeguard the cultural heritage values for today and future generations;
- ▶ In the elaboration and implementation of the CHIMP all relevant municipal departments and agencies have to be involved in an adequate manner;
- ▶ The CHIMP will be used and functions to coordinate the sectoral policies, concepts, plans, actions, etc. which are directed or affect the historic urban area and its cultural heritage – the CHIMP is no sectoral plan!

### 2. Communicative and participative

- ▶ The relevant private actors have to be identified and activated to take part in the elaboration and implementation of the CHIMP;
- ▶ Adequate participation structures have to be developed;
- ▶ Private actions have to be integrated in the CHIMP and coordinated with the public actions.

#### 2.4.2 Management System

Having coordinated and balanced the different needs and having developed appropriate actions, it has to be secured that these are implemented and agreements are kept. Further the continuous work and examination with the historic urban area and its cultural heritage has to be secured to secure what has been achieved and to continuously improve it. This demands an appropriate management system to effectively manage and deal with the different demands of and towards the historic urban area. Based on the three main characteristics of an integrated approach, following requirements derive for a CHIMP:

### 1. Process Approach

- ▶ The CHIMP has to elaborate the needed processes, its activities and its interactions to be able to take into account, balance, coordinate and satisfy the different demands of and towards the historic urban area. The demands, the available inputs and the necessary outputs (to be able to satisfy the demands) have to be known and the processes have to be structured accordingly to be able to transform the inputs to the desired outputs.

### 2. Management and Control Approach

- ▶ The CHIMP has to define and describe the needed actions and (management) structures to be able to implement the Plan-Do-Check-Act cycle (*s. p.24 for further information*).

### 3. Continual Improvement Approach

- ▶ The CHIMP has continuously to be update and adjusted (so far necessary).

The compliance and implementation of these requirements will secure to effectively balance and coordinate the different demands and interests on historic urban areas to support a sustainable, urban development, which combines the coordinated safeguarding of the historic urban landscape with the socio-economic and environmental development to maintain and to strengthen the attractiveness and competitiveness of historic urban areas.

### 3 Cultural heritage integrated management plans: Subject

#### 3.1 Content

*For further information about the single headings see also "Ringbeck, B.: Management Plans for World Heritage Sites – A Practical Guide, 2008".*

The requirements of the integrated approach and the management system as well as the objective of the Cultural heritage integrated management plan demand to deal with certain issues in a CHIMP. The structure and content of a CHIMP could look as follows:

##### I. Introduction

Describe the objective and the purpose of the cultural heritage integrated management plan.

##### II. Identifying issues

Describe the status-quo of the historic urban area and the cultural heritage.

###### II.1 Understanding the historic urban area

- Description of the area (kind of cultural heritage, state of preservation, etc.)
- Statement of significance and identification of individual values/ authenticity/ integrity (*demands of the cultural heritage; which aspects have to be safeguarded*)
- Dangers and threats (possible or real) to the area
- Instruments of safeguarding (international conventions and charters, national law/ legislations, local regulations, etc.)
- Existing policies, strategies, concepts, plans, actions, etc. which are of relevance for the area and its cultural heritage

###### II.2 Stakeholders, Structures, Procedures

- List of relevant stakeholders for the safeguarding and further development of the cultural heritage and historic urban area (*demands of the stakeholders towards the cultural heritage*)
- Organisational and operational structures and procedures for safeguarding and further development of the cultural heritage and historic urban area (involvement of relevant public and private stakeholders in the sustainable management of the historic urban area)

##### III. Appraisal

Describe the vision, thematic objectives, approaches, actions, etc. for the historic urban area and the cultural heritage (*to satisfy their demands and the demands of the stakeholders as 'users'*).

###### III.1 Overall vision and general objectives for the area

- Short, mid and long term vision
- Short, mid and long term objectives
- Strategy on how to reach the objectives

###### III.2 Field of actions, objectives, strategies (*integrated approach*)

- Identify the relevant field of actions and related topics and issues to deal with (*s. p.8*)
- State for each field of action
  - Overall objective (*s. p.8*)
  - Topics and issues to deal within the field of action (*s. p.9*)
  - Goals of each topic to support overall objective
  - Actions, tools, policies, instruments (outputs) to accomplish the goals of the topic (existing and to be developed ones) (=strategy)
  - Stakeholders to involve

- III.3 Organisational and Operational structures and procedures (*Management structure, including continuous monitoring and review*)
- Objectives and strategy
  - Development/ adaptation of organisational and operational [structures and procedures](#) (*if needed; p. 12*)

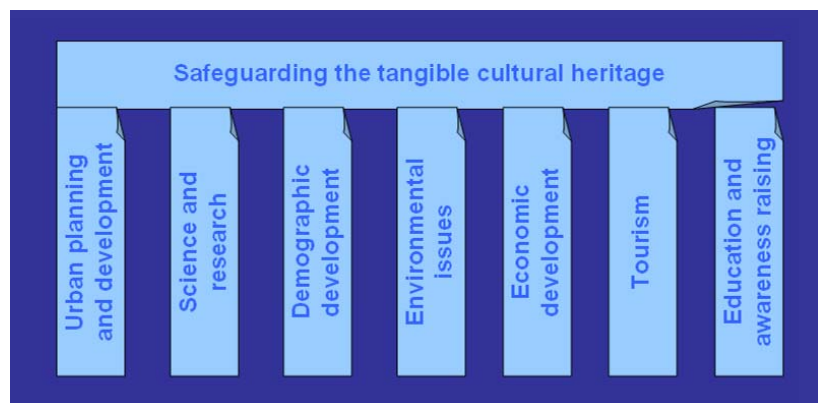
#### **IV. Implementation and Monitoring**

- IV.1 Action Plan/ Implementation Plan (*recapitulatory presentation of actions/ instruments/ structures, etc. to be implemented; how is doing what, inputs needed, outputs intended, etc.*)
- IV.2 Continuous monitoring and review (*description who is monitoring/ evaluating what and how will be dealt with the results – acting*)



### 3.2 Field of Actions and Topics

8 main fields of actions have been identified, which should be dealt with within the development of a CHIMP to secure the comprehensive approach of the CHIMP (*requirement of the integrated approach*):



This list of field of actions is not carved in stone! According to your local situation the field of actions have to be adapted and also further field of actions can be added and weight differently so that they suit your local situation.

As indicated in the "Content" of the CHIMP (*III.2 Themes and Topics*", p.6), for each field of action an **overall objective** with regards to the cultural heritage and the historic urban area has to be

defined (to which the CHIMP has to contribute to).

Examples for overall objectives for each field of action are:

Field of action	Objective
<b>Preservation of the cultural heritage</b>	Preserving the tangible and intangible cultural heritage values of a place.
<b>Environmental issues</b>	Adaptation of the tangible cultural heritage to environmental requirements and minimizing the negative impacts.
<b>Economic development</b>	Attracting & retaining a mix of economic uses that meets the needs of the local community and visitors (shops, jobs, housing, culture etc.) and respects the character of the historic centre.
<b>Tourism</b>	Sharing the unique character and identity of the historic urban landscape that brings economic & social benefits – balancing the needs of inhabitants & visitors.
<b>Urban planning and development</b>	Clear planning guidance to secure multifunctional areas and to balance/ coordinate the demands of the users.
<b>Demographic development</b>	Place for all generations and social groups.
<b>Education and awareness raising</b>	Fostering a strong identity of the citizens with their cultural heritage and mobilising the citizens to play an active role in the heritage management.
<b>Science and research</b>	Fostering scientific results for heritage planning and urban development and encouraging research topics.

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To be able to accomplish the overall objectives with manifold **topics** has to be dealt with within each field of action. Thereby it will occur that topics “appear” within more than one field of action, whereby “just” the “perspective” of the topic changes. I.e. “Recreational and green areas” can be part of the field of action “Environmental issues” and “Urban planning”. This illustrates the need of an integrated approach and that the field of actions are linked with each other! That has to be considered, when developing the CHIMP with the corresponding action plan.

Examples for topics for each field of action are:

Field of action	Topics and Issues
<b>Preservation of the cultural heritage</b>	<ul style="list-style-type: none"> <li>• Preserving the visual integrity of a place</li> <li>• Identify, evaluate, assess and document the historical (cultural heritage) values of buildings/ the ensemble/ the place</li> <li>• Conserve, restore and maintain the authentic built cultural heritage and preserve traditional uses and functions of buildings</li> <li>• Preserve the intangible values (link to: communication and interpretation)</li> <li>• Regulating new developments in the old town area and careful adaptation of buildings to new uses</li> <li>• Finding new uses for derelict sites/ buildings</li> <li>• Traffic control (traffic might affect historic buildings in terms of air pollution, vibrations, etc.)</li> <li>• Accessibility of historic buildings for handicapped people</li> <li>• Funding programs and regulations for privately owned buildings</li> <li>• Security of buildings</li> <li>• Innovative renovation techniques</li> <li>• Updating outdated infrastructure (e.g. of old buildings)</li> <li>• Public space improvement</li> </ul>
<b>Environmental issues</b>	<ul style="list-style-type: none"> <li>• Preventive and reactive measures for natural hazards and climate change</li> <li>• Adaptation of cultural heritage to environmental needs (e.g. energy efficiency, use of renewable energies)</li> <li>• Improving recreational and green areas in the old town</li> <li>• Special climatic conditions, e.g. winter</li> <li>• Weathering of historic urban fabric</li> <li>• Drainage (sealed surfaces)</li> <li>• Microclimate</li> </ul>
<b>Economic development</b>	<ul style="list-style-type: none"> <li>• Vitality &amp; Viability (mix of economic activities; mix of shops)</li> <li>• Accessibility</li> <li>• Overall local needs</li> <li>• Commercial signs in public space</li> <li>• Balancing tourism offers with inhabitants’ needs</li> </ul>

<p><b>Tourism</b></p>	<ul style="list-style-type: none"> <li>• Identity</li> <li>• Destination/ tourism offers</li> <li>• Attracting tourism/ visitor needs</li> <li>• Dealing with impact of tourism (e.g. through mass tourism; balancing needs of visitors and inhabitants)</li> <li>• Sustainable visitor management</li> </ul>
<p><b>Urban planning and development</b></p>	<ul style="list-style-type: none"> <li>• Development opportunities and integration of new development projects/ architecture</li> <li>• Mixture of functions: housing, recreation, working, commerce/shopping/daily goods, etc.</li> <li>• Public space</li> <li>• Mobility/ accessibility</li> <li>• Technical (streets, cables, lighting, etc.) and social infrastructure</li> <li>• Linking historic centre to surrounding urban areas</li> <li>• Protecting heritage assets</li> <li>• Guidance for proper maintenance of private buildings</li> <li>• Balanced community</li> </ul>
<p><b>Demographic development</b></p>	<ul style="list-style-type: none"> <li>• Employment in historic centres/ for inhabitants</li> <li>• Functions for all generations</li> <li>• Social facilities (health, education, culture, recreation, etc.)</li> <li>• Provision of daily goods and saving convenience shops</li> <li>• Housing for all social groups and generations; accessibility of houses</li> <li>• Mobility/ Accessibility in historic urban area for all generations/ social groups</li> <li>• Demographic change; over-/depopulation of historic urban areas</li> <li>• Gentrification/ segregation</li> <li>• Cultural identity of community</li> <li>• Balanced community</li> </ul>
<p><b>Education and awareness raising</b></p>	<ul style="list-style-type: none"> <li>• Heritage interpretation</li> <li>• Internal and external communication &amp; marketing</li> <li>• Involvement of citizens and stakeholders</li> <li>• Activities with children (heritage discovering)</li> <li>• Communicating the heritage values to tourism and inhabitants</li> <li>• Cultural events</li> </ul>
<p><b>Science and research</b></p>	<ul style="list-style-type: none"> <li>• External Expertise (e.g. restoration requirements)</li> <li>• Technical innovation</li> <li>• Fundamental research</li> <li>• Risk assessment</li> <li>• Monitoring procedures</li> <li>• Archaeological findings</li> </ul>

Which topics have to be dealt with within each field of action depends heavily on your local situation (challenges, problems, opportunities, etc.). Accordingly the list of field of actions and topics, relevant for your CHIMP, needs to be adjusted to your local circumstances.

### 3.3 Structures and Procedures

To reach the objectives of the CHIMP not only actions are needed, but also structures and procedures to secure that in the daily work routine these objectives are considered and brought forward.

#### Organisational structure

An organisational structure determines the structure in which the organisation (i.e. the municipal departments) operates and it clearly allocates responsibilities and tasks to meet

- the [objectives of the CHIMP](#) (s. p.4) and
- the successful application of the [management system](#) (s. p.24) and the [integrated approach](#) (s. p.23). See also the [requirements for a CHIMP](#) (p.4).

Most common the formal structures are recorded with an organisational chart (**organigram**) giving explanations on tasks, competences and responsibilities. Thus “everyone” knows who/ which department has which function and is for what responsible (what he or she has to do) to contribute to the objectives of the CHIMP and the application of the management system and the integrated approach. This facilitates the working relationship between the various involved departments and private stakeholders and supports the decision making and other relevant processes.

I.e. a CHIMP requires a structure in which it is determined

- the responsible body/ person for safeguarding the cultural heritage values;
- the responsible body/ person for the implementation, application/ compliance and revision of the CHIMP;
- the responsible body/ person for each [overall objective](#) (s. p.8) in the CHIMP (*can be more than one!*);
- cross-sectoral administrative structures to apply the integrated approach (i.e. to secure that new policies and actions are in accordance with the CHIMP).

For general information about organisational structures visit: <http://www.learnmanagement2.com/organisational%20structures.htm>.

#### Operational procedures

Operational procedures determine and clearly describe relevant processes to meet the objectives of the CHIMP and the application of the management system and the integrated approach. They description describes for certain situations the sequence of ‘actions’ (tasks, activities, steps, etc.) which have to be executed, and by whom in order to come to a decision and to obtain a positive result. It described also links and interactions to other relevant processes.

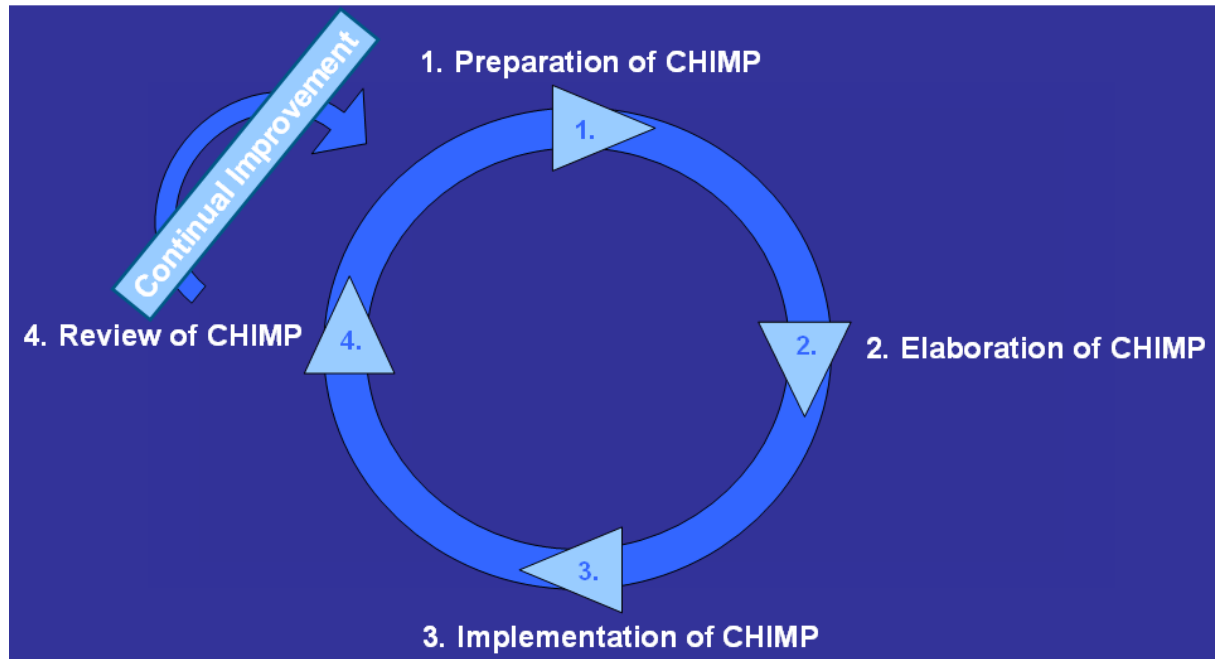
Through the description of relevant procedures each organisation/ person knows what he or she is supposed to be doing in certain situations and cases to ease and support the decisions making process. This improves the efficiency and success of an organisation and its operations.

I.e. what has to be done, by whom and in which sequence of actions to come to a decision (which meets the objectives stated in the CHIMP) when a property owner or investor wants to modify a building or construct something new in the historic urban area.

Further procedures should be described for coordination of relevant sectoral policies and actions, conflict settlement, for awareness raising, for monitoring, evaluating and revising the CHIMP and its action plan.

## 4 Cultural heritage Integrated Management Plans: Preparation and elaboration

There are 4 main steps in the “life cycle” of a CHIMP based on the [management approach](#) (s. p.24), which are repeated in a continual improvement process.



### 4.1 Preparation

There are 4 main steps in preparation of the elaboration or adaptation of a CHIMP.

#### 1. Analysis of the current situation

Before the CHIMP will be elaborated a thorough analysis of the current situation should be done to capture and assess the needs of improvement and the demands to be satisfied for safeguarding the cultural heritage and further developing the historic urban area. Following aspects should be analysed:

- Kind of cultural heritage in the historic urban area and the state of preservation, etc. (*description of the area*);
- Significance and value of the historic urban area and its tangible cultural heritage (*demands of the cultural heritage to be satisfied: what has to be safeguarded*);
- Demands of the ‘users’ towards the historic urban area and the cultural heritage (*demands of the ‘users’ to be balanced and coordinated with the demands of the cultural heritage*);
- Dangers and threats (possible or real) to the historic urban area and the tangible cultural heritage (*SWOT-analysis: strength, weakness, opportunities and threats to deduct from these needed actions*);
- Existing instruments for safeguarding the heritage values (*international conventions and charters, national law/ legislations, local regulations, etc.; check if instruments are sufficient or have to be adapted or new ones have to be developed*);
- Existing policies, strategies, concepts, plans, actions, etc. (from the sectoral departments, but also of private organisations), which are of relevance for (affect) the historic urban area and the cultural heritage (*check for conflicts and coordination and adaptation needs, etc.*);

- Organisational and operational structure and procedures for safeguarding and further development of the cultural heritage and historic urban area (*check if structure and procedures are sufficient or have to be adapted or new ones have to be developed*);

The results should be summarised in a baseline paper, documenting the current situation of the historic urban area and its tangible cultural heritage.

2. Develop objective, content and structure of CHIMP

Based on the thorough analysis of the current situation the objectives of producing the CHIMP (*what do you want to achieve with the CHIMP*) and the issues to be dealt with in the CHIMP (*with which field of actions, structures and procedures do you want to deal with*) can be defined, drafting the content and structure of the CHIMP (*s. p.6*). Think also about the “role” the CHIMP should take in the framework of the urban policies and planning documents (i.e. binding or non-binding document).

3. Define work plan for the elaboration of the CHIMP

Work out the work plan for the elaboration/ adaptation of the CHIMP: Tasks/ steps, responsibilities, time schedule (*what has to be done, which steps have to be executed in which sequence to elaborate the CHIMP*).

## 4.2 Elaboration – Adaptation

### From Vision to Action

Knowing the current situation and the improvement needs, the requirements, which result from them, have to be “translated” into “actions”

- to accomplish the objectives of the CHIMP,
- the satisfaction of the demands as well as
- the successful application of the integrated and management approach.

The following “**chain of deduction**” is a helpful methodology to decide which “actions” are needed, should have a high priority and your limited resources should be channelled to to safeguard the cultural heritage values and further develop the historic urban area.

1. Define the overall vision and general objectives for the historic urban area

Define the vision for the historic urban area to which the relevant stakeholders should want to contribute to. The vision reflects your aspirations and specifies its intended direction or future destination.

From this vision deduct the general objectives for the historic urban area and the cultural heritage (for safeguarding and further development to satisfy the demands of and towards the historic urban area). One way of thinking about the general objectives is to vision the changed situation that you wish to see in a certain future for that area and the cultural heritage.

2. Define the field of actions, its objectives and strategies (*integrated approach*)

a) Identify and define, based on the analysis of the current situation, the main field of actions (*s. p.8*) to deal with in support of the general objectives.

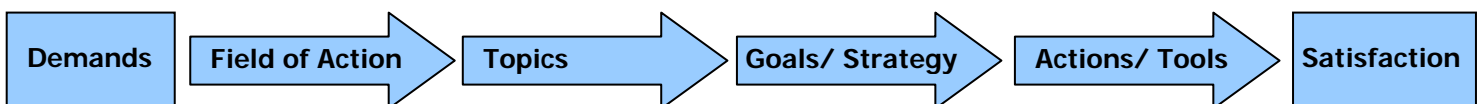


b) Define for each field of action

- The overall objective (s. p.8) with regard to the cultural heritage. The overall objective should vision for the field of action the changed situation that you would wish to see in a certain future (*what you want to achieve*).
- The topics and issues (s. p.9) to be dealt with within the field of action to be able to achieve the overall objective (*in which "areas" has what to be done to achieve the intended objective*).
- The concrete goals of each topic in support of the overall objective of the field of action (*think about what you want to achieve directly with the help of your actions*). This step will put you in the position to deduct concrete needed actions for each topic.

3. Define the actions in support of the objectives

- Develop and deduct actions which can be directly related to and support the defined goals of each topic (*ask yourself what actions/ outputs are required to achieve the goal, which outputs have to be delivered/ produced*). For that
  - Prepare an overview about existing actions and envisaged actions from existing concepts and plans.
  - Analyse the up-to-dateness and relevance of the actions and if they are sufficient to reach the set goals and objectives.
  - Develop further actions if needed.
  - Define the priority actions (key projects)
- For each goal of each topic actions have to be developed to assure that these goals can be reached.
- The actions have to be formulated in a way, that it is clear what exactly has to be done in the future, by whom and which stakeholder to involve to be able to successfully implement them.
- Actions can also be the development of tools, policies, instruments, procedures, etc. (outputs) to accomplish the goals of the topic.

**Organisational and operational structures and procedures**

Besides planning and deducting the vision, objectives and actions etc, structure and procedures have to be developed and applied to secure that in the daily work routine the objectives of the CHIMP are considered and brought forward.

1. Define needed organisational and operational structures and procedures

Identify and define, based on the analysis of the current situation, the needed organisational and operational structures and procedures (s. p.12) to be able

- to achieve the defined objectives and goals in the CHIMP and
- to successfully implement and apply the management system (s. p.24) and the integrated approach (s. p.23). See also the requirements for a CHIMP (p.4).

2. Set the goals for the structure and procedures

Having identified needed structure and procedures, set the goals for each one, so that each organisation/ person knows for which purpose serves the structure and procedures.

3. Develop needed structure and procedures

Having set the goals, develop or adapt the necessary structure and procedures.



**On what to pay attention to**

When you elaborate the CHIMP, pay attention to following aspects which are of high relevance for a successful and useful CHIMP:

- Define the field of actions, objectives, topics, goals, actions and structures and procedures based on the analysis of the current situation.
- From the vision, via the objectives to the goals of topics, they should get more concrete and measurable (the lower level specifies the upper level; important for an effective monitoring and evaluation of the CHIMP).
- The vision, the objectives, the field of actions, the goals of topics, actions should be consistent, deducible of each other (support each other) and achievable over a defined time period.
- Coordinate and link objectives, goals, actions and structures and procedures to identify possible conflicts/ contradictions already in the planning phase and to make visible synergies and win-win situations (communication them to the involved stakeholders/ working groups).
- Actions that do not contribute to the defined goals and objectives should be excluded.
- Assure identification and support of vision, objectives, goals, actions and structures and procedures by relevant stakeholders (in particular of the LSG and politicians) and that they want to contribute to these.
- Make the vision, objectives, goals, actions and structures and procedures well known to the public (PR) and the stakeholders not directly involved in the elaboration process of the CHIMP. Also inform about the process of elaborating the CHIMP to raise the awareness about the issue, the identification with the results and gain their support – to avoid confrontation during the implementation phase.
- Make sure that actions also for the improvement of the management system dealing with the cultural heritage and its further development are developed (i.e. monitoring system).
- In general, give stakeholders the opportunity to give feedback on objectives, goals, actions and structures and procedures. Take the feedback seriously – think about it.
- Have external support organising the process of the elaboration of the CHIMP, in particular involving the LSG and citizens. Externals are rather considered being more neutral than the administration in charge (fear that the administration just wants to “use” you). External support can also bring an outside view into the process.
- Think also about intangible heritage.

“Be aware that whilst following a pre-agreed procedure, elements may change that can alter the timing or direction of the project (positively or negatively), despite the best-laid plans. Therefore, whilst the considerable effort put into producing the project plan should be respected, it should not become dictatorial. Flexibility is to be encouraged when it is in the interest of the project, and when consensus can be reached by the partners. This is why the next key stage is so important.”

**4.3 Review – Monitoring**

Even with the most thorough and conscientious planning and preparation of a CHIMP, when it comes to practice change must be expected. The reason is, that reality turns out to be different than expected and forecasted; objectives and needs might change due to new challenges and circumstances. To be able to keep the CHIMP up-to-date, serving the needs of safeguarding the cultural heritage in a continual improvement process, it has to be regularly reviewed to allow to adapt to change.

One important instrument of reviewing is ‘monitoring’: Monitoring is “the systematic and continuous collecting and analyzing of information about the progress of a piece of work over time, to identify strengths and weaknesses and to provide the people responsible for the work with sufficient information to make the right decisions at the right time in order to improve its quality.” (Gosling and Edwards: 1995).

## Objective of Monitoring

Monitoring serves in general 4 main objectives:

1. **Observing and analysing** developments, progress and changes to make them “visible” (*i.e. how many historic buildings have been properly rehabilitated*);
2. **Reviewing the performance** to control the success and check the results (*i.e. has the number of wanted visitors of the cultural heritage information centre be reached; are you advancing towards that number*);
3. **Providing information to the general public** to raise the awareness and to give **advisory services** to citizens, property owners and investors about the development of the historic urban area and its cultural heritage (*enhance appreciation of the heritage i.e. by a public report about the benefits of safeguarding cultural heritage*);
4. **Supporting the objective decision making and taking corrective actions** by providing information to decision makers and affected people.

As the monitoring for a CHIMP ought to support the implementation, compliance, review and update of YOUR CHIMP to continuously improve the safeguarding of the cultural heritage and further development of the historic urban area, it is recommended to define in the beginning the concrete monitoring objectives for your CHIMP. According to the objectives the monitoring scheme will be build-up, suitable to your local needs and functioning in your local environment (*resources and personal for the monitoring*).

For the above mentioned general objectives, concrete objectives for monitoring CHIMPs might be:

### 1. Observing and analysing

- Surveillance of the preservation status of the cultural heritage and its values as well as the development of historic urban area in order to identify at an early stage problematic trends and to derive appropriate actions (*i.e. how many historic buildings are properly rehabilitated*);
- Monitoring the grade of satisfaction of the needs of the users of the historic urban area (*i.e. do people like to live there, do they appreciate the cultural heritage*).

### 2. Reviewing the performance

- Monitoring the (grade of) achievement of the objectives in your CHIMP (*very important, this will be of help in the decisions making for updating the CHIMP and its action plan*);
- Monitoring the functional efficiency and operational reliability of the structures and procedures for safeguarding your cultural heritage (*to be able to decide if the structures have to be adapted; i.e. when many historic buildings are not rehabilitated properly – although you have a urban design principles – your control and information system might not work sufficiently*);
- Controlling the implementation of the action plan and the production of the outputs of the actions (*i.e. you control if the actions are implemented as planned or you verify if your action plan remains the most appropriate and effective one or if new actions have to be developed to reach your objectives*);
- Controlling the compliance of new projects, concepts, plans, etc. with the objectives of your CHIMP.

### 3. Providing information to the general public and giving advisory services

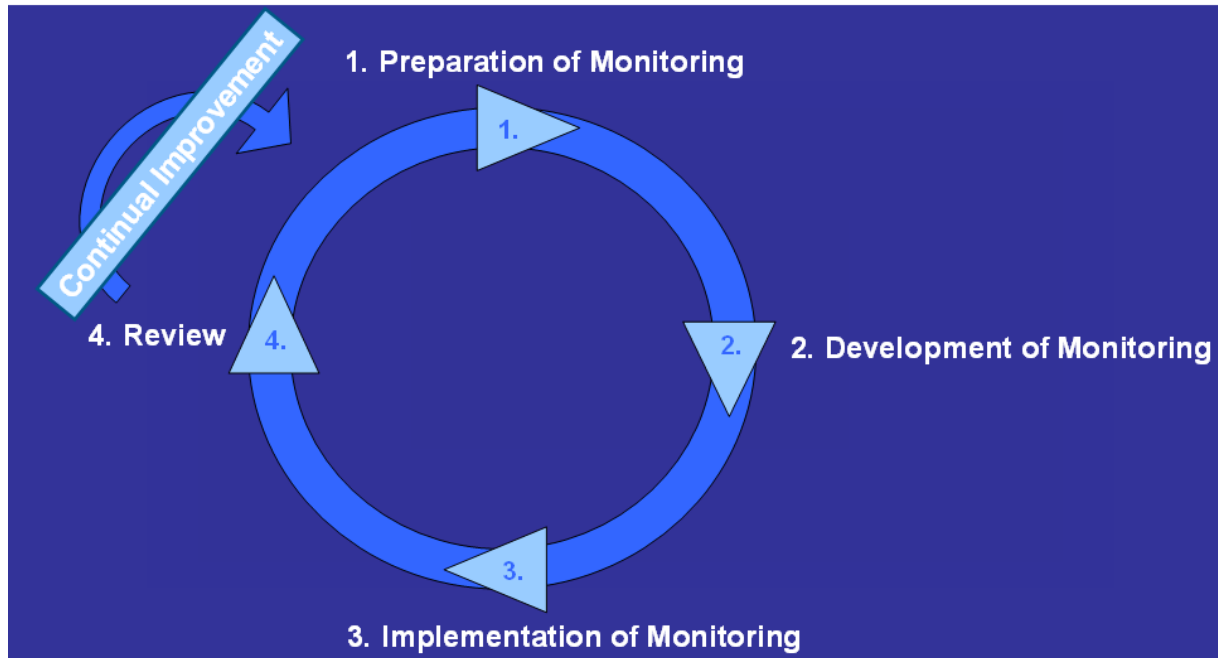
- Measuring the (economic, social and environmental) benefits of safeguarding the cultural heritage and the impacts on the urban development (*it improves your knowledge about the impacts of your CHIMP*).

### 4. Supporting the objective decision making and taking corrective actions

- Deriving and communicating the need for action based on the monitoring results and updating the CHIMP (*its vision, objectives, actions and structures*).

## Development and implementation of monitoring system

Alike the “life cycle” of the CHIMP there are 4 main steps in the “life cycle” of the monitoring system based on the [management approach](#) (s. p.24), which should be repeated in a continual improvement process.



### 1. Preparation of monitoring




In the beginning the monitoring methodology and the monitoring team should be set up:

- Definition of the *general* monitoring objectives (s. “general objectives” of monitoring above: *Decide if you want to observe, if you want to review the performance, etc.*);
- Identification and activation of the monitoring-team members (*think about whom do you need to be able to develop and implement the monitoring system: it might be your Local Support Group or parts of it; your department of statistics could be of help as they know about available data; other institutions that might have data you need; an expert helping you to define the best indicators, etc.*);

### 2. Development of the monitoring and indicator scheme

Outline and set up the monitoring and indicator scheme by defining:

- a. The requirements and *concrete* monitoring objectives (*i.e. do you want to measure the grade of achievement of your objectives in your CHIMP and/or do you want to control the implementation progress of your action plan; s. “concrete objectives” of CHIMP monitoring above*);
- b. The **indicator** scheme to be able to monitor your defined concrete objectives (*for each objective indicators have to be developed; for a structure see the table below as example*);
  - o Define indicators which can measure the objectives.  
*When defining an indicator make sure that it is clear, what exactly will be monitored. For example if you want to monitor the number of “historic” buildings in your area: what do you mean with “historic” buildings? Give a brief **explanation** what exactly has to be monitored: For example all buildings build before 2<sup>nd</sup> World War.*

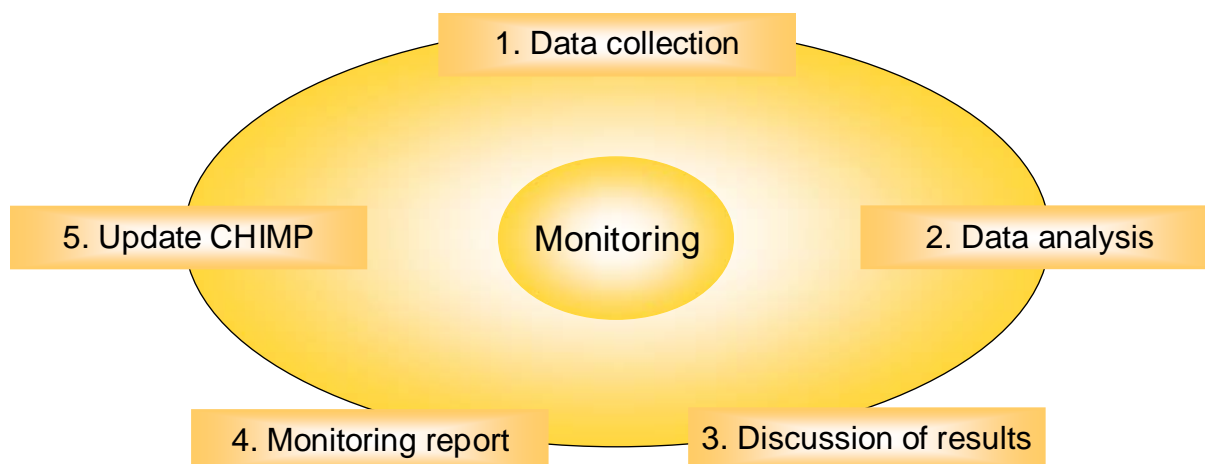
Objective	Indicator	Explanation	Target setting	Availability	Responsibility	Verification date
Communi- cation of cultural heritage values	Number of visitors of the cultural heritage information center	Number including not- paying children above 4	 number > year before  number < year before  number < 1 and 2 years before	Annual year book of statistics	Operator of information center	Period: whole year Data Collection and Reporting: 01.03

- o Define the **target-setting** of each indicator to be able to benchmark its actual state (*define how the “value” of the indicator will be interpreted to be able to decide if a deeper analysis about the reasons for the development have to be done and if actions have to be taken*). In practice the use of the traffic light system-methodology has to be proven helpful. Example: Your indicator is the number of visitors of the cultural heritage information centre.
  - If the number is higher than the year before, it is a positive development, mark the indicator *green*;
  - If the number is lower than the year before, it might be a negative trend, take an eye on it, mark the indicator *yellow*;
  - If the number is lower than the year before and the year before, be altered and make an analysis about the reasons and take action if needed, mark the indicator *red*.
  
- c. Working- and communication-structure to secure that the monitoring data will be collected, analysed and results communicated to the corresponding stakeholders to ensure the implementation of needed actions and the update of the CHIMP. Determine following for each indicator:
  - o **Availability:** Determine if the data of the indicator is available and from where (*i.e. from the annual book of statistics, the department of statistics, operator of the information centre, etc.*);
  - o **Responsibility:** Define the responsible institution for collecting and reporting the data of the indicator (*give contact details of a contact person: Name, phone, e-mail*);
  - o **Valuation date:** Define the date by which the data of the indicator has to be collected and reported and for which time period;
  - o **Reporting and documentation structure:** Describe the reporting and documentation structure: To whom will the data be reported; who is analysing the data, who is taking decisions about the demand for actions and updating the CHIMP; who is writing the monitoring report and to whom will it be communicated (*who is going to read the monitoring report and should act on it? Who is the target audience: citizens, administration, politicians??*)

### 3. Implementation and review of the monitoring

- a. Data collection: Collect, record and process the data of the indicator according to your working and communication structure.
- b. Data analysis: Analyse the data based on the target-setting (*when using the traffic-light methodology, analyse reasons for the developments/trends of the indicators in yellow and red, analyse the demand for action (derive ‘corrective’ actions)*). Record the results of the analysis and the need for actions in a report.
- c. Discussion of results of the data analysis: Communicate the draft report and discuss the monitoring results, in particular the demand for action, with the relevant stakeholders.
- d. Monitoring report and communication: Based on the results of the discussion, finalise the monitoring and action report and communicate it to your target audience to raise awareness, enhance appreciation of the heritage and bear on decisions affecting the historic urban area (*s. working and communication structure*);

- e. Update the CHIMP: Update the CHIMP and implement the defined actions according to the monitoring and action report.



### Examples of indicators to monitor the safeguarding of the cultural heritage

Possible objectives within the field of action "Safeguarding the cultural heritage" might "Preserving the built heritage", "Sustainable use of the built heritage", "Preserving the visual integrity" or "Protection of natural risks". Possible indicators to measure if you are advancing concerning these objectives might be:

#### Preserving the built heritage

- Number of protected (historic) buildings (*i.e. you measure if the number is decreasing or increasing*);
- Demolition of protected (historic) buildings (*i.e. you measure the number of demolished buildings*);
- Number of protected (historic) buildings in need of rehabilitation (*i.e. you measure if the number is decreasing or increasing*);
- Provided funding to preserve protected (historic) buildings (private and public ones) (*amount of funds available and spend for protection/ rehabilitation of historic buildings*).

#### Sustainable use of the built heritage

- Vacancies of protected (historic) buildings

#### Preserving the visual integrity

- Visual view perspectives, silhouettes, townscape characteristics and panoramas are not affected (*for this you have to have defined them*).

#### Protection of natural risks

- Number of protected (historic) buildings, damaged by environmental influences (*i.e. floods*);
- Damage of the cultural heritage by environmental influences measured in your local currency (*i.e. floods*);

## Hints for setting up and selecting an indicator scheme

### General hints

- a. **Use indicators in combination — as mutually supportive information.** Sometimes a single indicator can not give a clear picture about the development. But when using several indicators in combination, it can provide a better overview the development and the indication about the reasons for it (*e.g. number of historic buildings is declining, but there have been no permissions of demolishing such; this could be an indication that demolition was done without permission, as result you might have to improve your control functions; having had just one indicator the reasons for that development would be so clear*);
- b. **It is not about to measure the exact number:** It is about to receive an indication about the development to know if actions have to be taken or not (*e.g. when you have a large historic urban area, but limited personal resources to observe the state of rehabilitation need of each historic building. Instead of capitulating and doing nothing, define an area, which situation is typical for the rest of the historic urban area and measure just there the need of rehabilitation of the buildings (once a while you have to check if this area is still typical for the whole). The development of that area take as indicator for the whole area, thus, minimizing the efforts of monitoring.*
- c. **Adapt the indicator scheme to your local needs and resources:** Do not just take over an indicator scheme from another city; take in as a master and adapt it to your monitoring objectives and available resources for monitoring (*your local needs*).
- d. **Integrate your monitoring in existing structures** if possible to avoid double work i.e. collecting an indicator twice. Use existing structures in your organisation which already do monitoring or collect data. Maybe they can be of help for you.

### Indicators should be

- **Available and cost effective:** Make sure that the indicator is available (*i.e. in your annual book of statistics*) and can be collected with a justifiable and manageable amount of efforts or costs. Thus, prefer indicators that have a high information value (explanatory power) and at the same time acquire low personal and financial resources of retrieving the data (*make sure the costs of collection do not outweigh the information value*). Use as much indicators as needed and as few indicators as possible (*avoid a graveyard of data*).
- **Focused and precise:** Focus your indicators on your local needs, what your organisation is trying to achieve. In particular the indicators should relate directly to the objectives and outputs in your CHIMP (*this often means creating local indicators deducting these from your monitoring objectives*). Be clear and precise about what the indicator exactly has to measure. The indicator has to be unambiguous so that the data can be collected consistently (*i.e. number of "historic" buildings: what are "historic" buildings? Make this clear*).
- **Measuring developments and actionable:** The indicator should allow for reporting on progress and performance over time to put you in the position to get an overview about your development. Also the indicator has to relate to a specific situation which is amenable to influence or control by you (*you can act on these*) (*i.e. concerning natural risks to you cultural heritage you can measure the number of heavy rainfalls and floods, but as you can not change that they exist, the information is not so helpful. More helpful to be able to decide on actions would be for example to measure the damage of floods to your cultural heritage in terms of damaged housing or equivalency in your local currency. If there is little damage or costs your preventive actions are working; if it is increasing you might have to take actions*).
- **Adaptable:** Your indicator scheme has to be (easily) adaptable to changing needs and objectives (*do not make it too complicated*).

## 5 Annex

### 5.1 Basic terms – Glossary

*Please let me know which further terms you would like to have an explanation for!*

#### 5.1.1 Cultural Heritage

The term “Cultural heritage”, as applied in the HerO network, refers primarily to the physical or **“tangible cultural heritage”** which includes monuments, groups of buildings and historic sites that are considered worthy of safeguarding for the future.

The Article 1 of the World Heritage Convention defines “cultural heritage” as follows:

- **Monuments:** architectural works, works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features, which are of outstanding universal value from the point of view of history, art or science.
- **Groups of buildings:** groups of separate or connected buildings which, because of their architecture, their homogeneity or their place in the landscape, are of outstanding universal value from the point of view of history, art or science.
- **Sites:** works of man or the combined works of nature and man, and areas including archaeological sites which are of outstanding universal value from a historical, aesthetic, ethnological or anthropological point of view.

A broader definition of “cultural heritage” includes as well **intangible cultural heritage**, often maintained by social customs during a specific period in history. These include social values and traditions, representations, customs and practices, aesthetic and spiritual beliefs, (artistic) expression, language, knowledge, skills and other aspects of human activity that communities, groups and, in some cases, individuals recognize as part of their cultural heritage.

#### 5.1.2 Historic Urban Area

The term “Historic Urban Area” refers to consider such areas not only as an accumulation of physical (cultural heritage) aspects, but to consider it as a living organism and vital living space for its inhabitants with all its social, cultural, environmental and economic interactions.

#### 5.1.3 Historic Urban Landscape

Historic Urban Landscapes refer “to ensembles of any group of buildings, structures and open spaces, in their natural and ecological context (...), constituting human settlements in an urban environment over a relevant period of time, the cohesion and value of which are recognized from the archaeological, architectural, prehistoric, historic, scientific, aesthetic, socio-cultural or ecological point of view. (...) The historic urban landscape is embedded with current and past social expressions and developments that are place-based. It is composed of character-defining elements that include land uses and patterns, spatial organization, visual relationships, topography and soils, vegetation, and all elements of the technical infrastructure, including small scale objects and details of construction (curbs, paving, drain gutters, lights, etc.)” (*Vienna Memorandum on “World Heritage and Contemporary Architecture – Managing the Historic Urban Landscape”*).

#### 5.1.4 **Cultural heritage integrated management plan**

A Cultural Heritage Integrated Management Plan is an innovative instrument (framework document: document of reference stating basic rules and procedures) to effectively manage the sustainable safeguarding and development of historic urban areas and their cultural heritage to attractive, competitive and multifunctional places. It balances and coordinates the cultural heritage needs with the needs of the (manifold) “users” of the historic urban area and the responsible governmental bodies (demands of and towards the historic urban area and its cultural heritage).

Thus, a Cultural Heritage Integrated Management Plan determines and establishes the appropriate strategy, objectives, actions and management structures to balance the different needs and to use historic urban areas and its cultural heritage as development asset.

#### 5.1.5 **Integrated Approach**

An integrated approach is characterised by two main aspects:

##### **1. Comprehensive, cross-thematic and cross sectoral approach**

- ▶ Taking into account all dimensions/ needs of urban life (**cross-thematic**) in an interdisciplinary way: take the historic urban area as place to live, to work, to relax, to shop and to invest,
- ▶ by intensifying **cooperation** and teamwork between the responsible municipal departments and agencies for these areas/ fields (**cross-sectoral**)
- ▶ to **coordinate** sectoral policies, concepts, plans, actions, etc. (existing as future ones).

##### **2. Communicative and participative approach**

- ▶ Activating and **involving the relevant private stakeholders** (in particular the ones needed for implementation) in an early stage of the safeguarding and further development process of the historic urban area and the implementation of actions/ measures. This with the intention to:
  - identify and mobilise the local potentials and private resources (*public resources will not be sufficient*);
  - direct plans and actions to the needs of these stakeholders (*better solutions; happier people*);
  - coordinate the public and private actions, giving them the same direction (*public and private actions support each other*).
- ▶ Developing **common objectives and actions** (*people are more supportive of objectives and actions when they had been part of the elaboration; the common elaboration/ cooperation also bears the chance that the stakeholders gain an understanding of each others needs, thus being more open to find compromises*).
- ▶ **Coordinating public and private actions** and the implementation of them

These are the main two characteristics of an integrated approach. There are many forms and way of implementing such an integrative approach (formal as informal ones). The system of Local Support Group and Local Action Plan – as it is intended by the URBACT program - is one example for the implementation of an integrated approach.



### 5.1.6 **Management System**

A Management System is the framework of policies, objectives, actions and proceedings applied to ensure that an organization can fulfill its tasks properly to achieve the defined goals (*instrument of implementation*). It is a pro-active approach, not only concentrating on prevention, but inducing and influencing needed development and actions. It not first intervenes when problems come up, it tries to anticipate them to ensure a wanted development. Further it is characterised by continuous actions instead of only singular actions.

There are three main aspects which characterise a Management System:

#### 1. **Process approach**

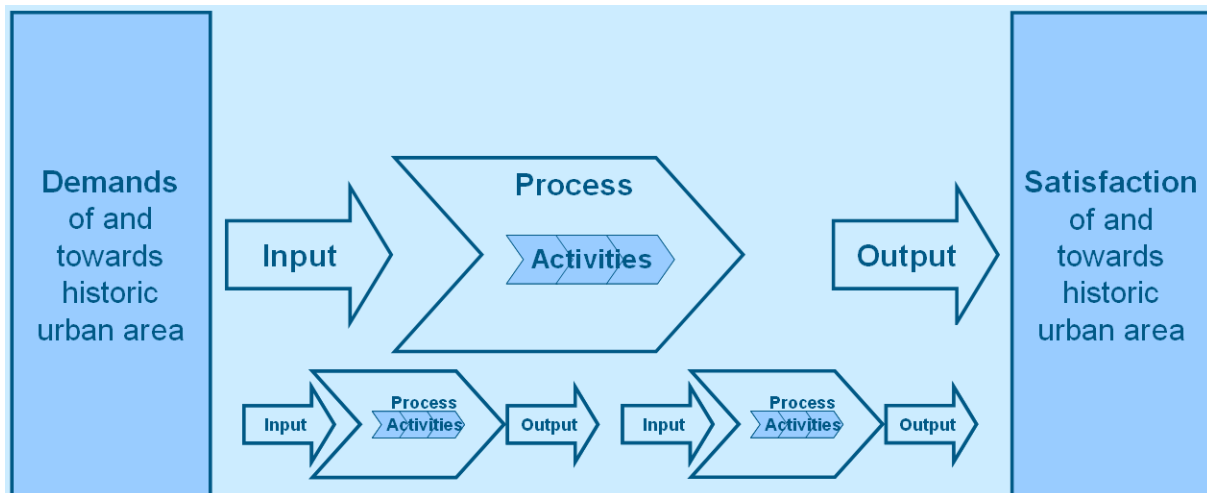
There are certain **demands** of and towards the historic urban area. In general it should be the intention to **satisfy** these demands. A management system manages the **processes** to satisfy these demands.

A process consists of **activities**, which aim to transform **inputs** (e.g. know-how, finances, materials, immission, etc.) to a desired **output**, which will satisfy the needs. Often an output does not directly satisfy the need, but forms the input for another process.

So within a management system the process approach means:

*The application and management of a system of processes, together with the identification and interactions of these processes, to transform inputs to outputs, which satisfy the needs and demands.*

#### Process Approach



#### 2. **Management and Control approach**

A Management system directs (management) and controls (monitoring/ evaluation) the implementation of the processes, which means to manage the developed actions/activities as well as the developed organizational and operational structures. This has to be done in a systematic and transparent manner towards the defined objective to continually improve the performance, addressing the needs of all interested parties.

#### Cycle of this process:

The management and control approach contains four typical steps, which repeat continuously (PDCA-cycle):

**1) Plan** (*Elaboration of the Integrated Cultural Heritage Management Plan*)

- ▶ Define the **objectives**,
- ▶ Define and prepare necessary actions/ activities/ projects (**action plan**) and resources (inputs needed and available: finance, personnel, instruments, etc.),
- ▶ Set up and regulate responsibilities and competences/ powers (**organizational structure** to support the implementation of the actions/ activities/ projects),
- ▶ Determine how tasks and proceedings are to be implemented/ applied and how they are linked (**operational structure** of procedures and processes),

to be able to satisfy the demands of and towards the historic urban area and transform the inputs into the desired outputs.

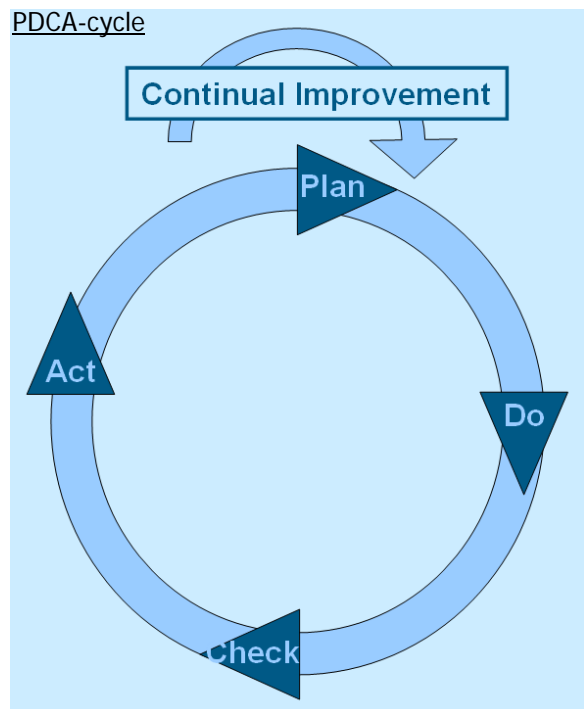
**2) Do** (*Implementation, application and compliance of the Integrated Cultural Heritage Management Plan*)

- ▶ Implement and manage the actions/ activities/ projects and apply the organizational and operational structures of procedures and processes.

**3) Check** (*Monitoring and evaluation of the effects of the Integrated Cultural Heritage Management Plan*)

- ▶ Monitor, analyse and evaluate the results of the processes: target-performance comparison (implementation of actions and structures) to determine if the objectives and demands are achieved; if the actions, structures and procedures are the correct ones, if they function well, if they have to be improved, adapted, etc.

PDCA-cycle

**4) Act** (*Adaptation of the Integrated Cultural Heritage Management Plan*)

- ▶ Take actions based on the results of step "Check" to continually improve the process performance, formalizing changes.

**3. Continual improvement Approach**

The aim of the management system is to continuously increase the performance of the municipality through a process of continuous actions to be capable to satisfy the demands of and towards the historic urban area. So the PDCA-Cycle will be continuously repeated to verify and adapt its declarations and stipulations (*the action plan should be revised each year (monitoring), whereas the whole CHIMP in a 5 years cycle (evaluation)*).

## 5.1.7

### **Management**

Management describes the process of planning, organising, staffing, leading and controlling the efforts of an organisation and its members and of using all organisational resource to achieve stated organisational goals. A manager's job is to maintain control over the way an organisation does things, and at the same time to lead, inspire and direct the people under them.

The basis functions of management, often classified as planning, organizing, leading/motivating, and controlling are:

- **Planning:** Deciding what needs to happen in the future (today, next week, next month, next year, over the next 5 years, etc.) and generating plans for action.
- **Organizing:** (Implementation) making optimum use of the resources required to enable the successful carrying out of plans.
- **Staffing:** Job analyzing, recruitment, and hiring individuals for appropriate jobs.
- **Leading:** Determining what needs to be done in a situation and getting people to do it.
- **Controlling: Monitoring,** checking progress against plans, which may need modification based on feedback.
- **Motivating:** the process of stimulating an individual to take action that will accomplish a desired goal.

#### 5.1.8 **Monitoring**

Monitoring is "the systematic and continuous collecting and analyzing of information about the progress of a piece of work over time, to identify strengths and weaknesses and to provide the people responsible for the work with sufficient information to make the right decisions at the right time in order to improve its quality." (Gosling and Edwards: 1995).

## 5.2 Further readings

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