

# UNIVERSAL RULES AND MODEL FORMS OF MODERN MANAGEMENT OF THE HISTORICAL RUINS

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## PREAMBLE

Historical ruins and, more in general, the whole Cultural Heritage provide a tangible link with our past and are thus fundamental in order to testify the ancient roots and our ancestors' habits and culture within the nowadays society. In this perspective, a sustainable and correct approach to their management is one of the main tasks for Authorities, Bodies and Associations involved in the protection and management of Cultural Heritage. In addition, according to this view, it seems important to provide to the Cultural Heritage a role within the life of the local community where the monument is located.

Nowadays many heritage places have been adapted for new uses, providing them with a function that guarantees their continuing maintenance and relevance to society. The re-use of a building through a compatible use allows the functional recovery of the monument. Restoration to active use of historical ruined sites may be the most viable way to ensure their continued existence.

The term 'management' has been used in a very broad way in the heritage sector: as issues become more complex, there is a need to be more precise. Management approaches must accommodate the shift (which has only emerged very recently in many parts of the world) to a wider, more inclusive approach to heritage management and to a greater emphasis on community engagement.

Designing and realising a sustainable management of historical monuments and ruins needs to take into account several issues and to select the correct solution, in order to preserve the historical monument on one hand, and to evaluate if a reuse of the building is possible, and which one is the best, on the other hand. In this perspective, it is important to design the most appropriate way to manage the monument, in order to assure the preservation of the consistency and of the dignity of the heritage as well as to maintain and, if it is possible, to enhance the role of the historical building within the social environment where it is located and the stakeholders who refer to it. The projecting and running process of a sustainable management of historical monuments includes a number of aspects, from the architectural ones to the financial and promotional ones.

The purpose of this Document is therefore to outline the order of actions and some shared principles that should be considered when approaching to the management of a piece of Cultural Heritage. Through this Document, the interested parties and the involved stakeholders are given some accounts about the proper procedures and operations in order to develop a strong management model for a cultural site and for the context where it is located.



## OBJECTIVES

In recognizing that the project of sustainable management is part of the overall process of cultural heritage conservation and enhancement, this form seeks to establish seven main actions, upon which modern management of the historical ruins should be based.

**Action 1: Preliminary knowledge of the building**

**Action 2: Preliminary knowledge of the context**

**Action 3: Identification of the management model**

**Action 4: Identification of contemporary uses and viable new uses**

**Action 5: Financial activities**

**Action 6: Projecting the adaption to the new use of the building**

**Action 7: Promotional and finalisation activities**

Following from these seven principles, the objectives of this Document are to:

- Outline a scientifically and socially correct approach to the management form of medieval ruined sites;
- Outline the main conceptual steps that characterize a project of management of historical ruined sites;
- Provide all interested stakeholders with synthetic insights on the possible types of modern management of historical ruined sites.



## ACTIONS

### Action 1: Preliminary knowledge of the building

1.1 Every management process of a cultural site must start from a deep knowledge of the state of the cultural good itself, both from the physical and architectonic point of view and from the context where it is located, including the intangible and cultural values that are commonly referred to the monument;

1.2 The preliminary knowledge of the architectonic remains of the monument should start with a deep survey, that has to take into account some main issues concerning the building, such as a building description, an exterior surfaces (facades) survey, an internal survey and a roofing survey;

1.3 It should be advisable to consider the possibility to use non-invasive and non-modificative methods - such as the GPR, the thermocameras or the Electric tomographies – in order to enhance the knowledge about the state of preservation of the monument;

1.4 A second survey should be addressed to know the succession of the construction or alteration phases, details of major repairs or remediation work including exact location and time, or documentation, the date and frequency of ordinary and extraordinary maintenance, information on the existence and use of a manual for maintenance and data about the contextual dangers that could afflict the cultural good.

1.5 A deep survey of the history of the monument is necessary, in order to know when it was built and altered, which were the owners, which were its functions during the centuries, how it modifies the landscape.

1.6 A deep survey of the legal framework is unavoidable, In order to know who is the owner and which laws he and manager have to observe, which are their obligations and their rights, which are the Authorities to be involved in the management process.

### Action 2: Preliminary knowledge of the context

2.1 A Cultural Heritage management project should take into account not only the monument in itself, but also its context and its surroundings. This allows both to ensure a better management of the monument on one hand, but also to ensure a stronger link between the monument and the community where it is located on the other hand.

2.2 It should be considered the role the ruin had in the past within its context (for example, as a landmark for non-urban areas) and the role it could play in the modern context, both in urban and in non-urban areas.

2.3 In order to enhance the valorisation of a Cultural good, it is fundamental to provide a strict accessibility analysis, that can evaluate how strongly the ruin is connected with its territory. Concerning this point, transport facilities are crucial and are to be considered in order to facilitate accessibility to tourists,



including foreigners; facilitate accessibility to the city centre and promote urban mobility; facilitate the mobility around the destination chosen for the visit.

2.4 In order to estimate the possible audience of the site, an analysis of the demand and supply of the territory must be carried out. This kind of analysis defines a “catchment area” of the monument, and through this tool sets out the possibility to exploit the cultural demand of the reference audience for the site. In this way, according to appropriate calculations, the residual demand is determined, given the difference between the potential demand (the set of theoretical users) and the one already satisfied (the subset of those already benefiting from the offer on the market).

2.5 In a project of enhancement of a ruined site, the analysis of the current cultural supply of the territory assumes fundamental importance. The cultural supply should tend to be investigated at the regional scale to get the most comprehensive picture possible and the following cultural services and activities must be identified

2.6 The demographic and social analysis of the context is another important step in order to better calibrate the enhancement project. A very significant indicator of the development prospects of a territory is represented by the demographic dynamics in progress on it; another aspect to consider is employment dynamics. Lastly, an analysis of the settlement needs of the area, which allows to select 'driving' activities, capable of producing income, to which to associate driving activities, capable of satisfying the cultural and social needs posed by the community should be done.

### **Action 3: Identification of the management model**

3.1 In defining the management model of a Cultural good or monument, it is crucial to identify which kind of ownership the good has, and which its the legal framework.

3.2 An important precondition for every management model of cultural heritage is an effective registration and digitalization system of cultural heritage. The registration system should be comprehensive, comprehensive, transparent and the central enrolment of cultural goods accessible to experts, public and investors. Digitalization needs to ensure fast, efficient and quality planning and prioritization in the financing of protection and preservation while determining the conditions of use and the possibility of using each category of cultural heritage.

3.3 Generally speaking, a management form could be entirely public, entirely private or could adopt a Partnership among Public Entities and Private Parties (PPP). It is important to bear in mind that a unique valid form of management doesn't exist, and it has to be chosen on a case by case basis.

3.4 The decision process about the form of management should include all the possible stakeholders.

3.5 In any case, even if not directly included in the decision process, local community should be informed step-by-step about it.

3.6 The policy holder of the PPPs are mainly of three kinds: public Authorities, mainly that are in charge for the management or the conservation of cultural monuments, ruins or sites and that can be at a general or at a local level; private investors or business organizations, that can fill the gap of economic capability that often affect public Authorities; social organizations, deeply rooted in the territory surrounding the site. In



particular, this third party is gaining importance for some years now, because of its role in order to share the responsibility of preserving and valorising the monument with the community that values it. Members of this third part could be nongovernment, social, and community-based institutions, and they may also include people living near a heritage site.

3.7 In any case, the basic aim of any management form should be to preserve the monuments and not to damage their integrity as well as their intangible values. In this perspective, the choice of a new function, being it economic or non-economic, should be taken very carefully and first of all it has to respect the Cultural good.

3.8 Whatever form of management could be selected, it is important to subscribe a shared statement which clearly define which are the duties of each parties involved in the management.

3.9 To do this, it could be helpful to use a management plan, that exactly envisages the actions to be carried out in order to provide a consistent management of the Cultural good. Basically, the management plan helps the managers to (a) perform the planned and expected operations, and (b) constantly check that they are on the line of the organization's mission and of the pre-determined aims.

#### **Action 4: Identification of contemporary uses and viable new uses**

*The forms of use and reuse of historical ruined sites might be different according to the specific characters of buildings and contexts. Each site has its individuality and therefore requires an independent approach.*

4.1 The selection of a contemporary use and re-use of historical ruined sites should explore different kind of functions: cultural, educational, commercial and residential. The presence of multiple uses can be considered, provided they are compatible with each other;

4.2 Generally, the cultural function better fits the criteria of authenticity and compatibility. In this case the ruined site can return to play a key role for the social and cultural life of the community, but also becomes a point of tourist attraction;

4.3 Types of cultural use for historical ruined sites might be: archeological park / site museum, historical, ethnographic, artistic museum, location for cultural events (temporary exhibitions, concerts, theatrical performances, historical re-enactments, tasting of local food and wine products), places for trekking / stages of cultural routes;

4.4 In the case of educational / didactic function, the historical ruined site is used for training and educational activities for schools (workshops, trips, guided tours) or universities (visit to restoration sites, training on restoration techniques);

4.5 Commercial function involves the use of spaces for commercial activities such as accommodation (hotels, bed and breakfast, etc..), catering (dinners, pic-nics, gatherings, refreshments, parties), wedding celebrations, spaces equipped to host seminars / conferences or for other commercial events. In this case, the management structure of the site sets quotas for the rental of spaces for commercial purposes;





4.6 In the case of residential use the transformation of the spaces for residential purposes generally involves a partial reconstruction of the historical ruined site and the insertion of new volumes.

## **Action 5: Financial activities**

5.1 In order to properly build and develop a frequentation of a monument or a site, it is useful to adopt a business plan, that – as well as every other business plan devoted to economic enterprises – should consist of several steps: planning; implementation; output; outcome. These phases make possible to overcome the fact that monitoring, evaluating and feedback became increasingly difficult;

5.2 For managers of Cultural Heritage, the primary reasons for writing a plan will be to: provide a clear, realistic, and practical blueprint for an organization's future development; enable everyone in the organization, including its board or management committee, to agree upon and share common goals; ensure the participation of key stakeholders; ensure that the organization's goals can be achieved with the resources available to it; identify any key risks that could prevent an organization meeting its goals and put plans in place to mitigate these; achieve a smooth handover at times of staff change.

5.3 Core parts of the business plan are an institutional analysis, including a strong SWOC analysis, a market analysis, a deep framework about the human resources and a risk analysis, including both structural and financial ones.

5.4 The finalizing section of the business plan is the financial plan. The Financial Plan helps the organization's management to completely understand the organization or site's financial situation and funding requirements. In this phase, all the actions and requirements identified in the previous analyses, as well as the employees gaps, are transformed in expenses and an adequate budget coverage is established, if it is possible, for them.

5.5 Before starting a cultural or an economic activity based in a monument or in a cultural site, it should be undertaken a feasibility study and preliminary economic assessment. Evaluation must be considered a strategic asset and a methodology for designing the investments, and the central core of the planning process, as it helps to remove discretion for decisional process, especially if the investment is public. The assessment of the feasibility of an intervention is a difficult exercise, arbitrary in case of absence of a precise general methodological framework.

## **Action 6: Projecting the adaption to the new use of the building**

*Historical ruined sites, as places of memory and precious spaces for the community, must be accessible and welcoming to everyone. Accessibility is not limited to the purely physical point of view but also includes the aspects of cognition and usage.*

6.1 The project of adaption to the new use of the building must accomplish the legal framework of the Country and have been authorized by the Authorities in these tasks;



6.2 The project of adaption to the new use of the building should be shared with local communities and with all the stakeholders that are or may be interested in the life of the monument;

6.3 The project of adaption to the new use of the building should be aimed to preserve the consistency, authenticity and dignity of the monument as well as to enhancing its role within the local community;

6.2 The first step of the project should be a feasibility study, that should include, in particular, the analysis of the current status, the SWOT analysis, the framework content of the project and the rough estimate of costs;

6.5 The project of adaption must be monitorable and monitored during the whole process of intervention;

6.6 The restoration and architectonical interventions that cause modifications to the original aspect and consistency of the ruins must be clearly identifiable. In any case, the modification should be, as far as possible, reversible;

6.7 The restoration project must be based on the minimum intervention, ie limited to operations strictly necessary and aimed at avoiding unnecessary additions and unjustified alterations.

6.8 During the realisation of the adaption to the new use, if it accomplishes the legal framework and the laws concerning the safety, it should be advisable to organise some visits to the site for local people in order to share the transformations occurring to a piece of their heritage;

6.9 A sustainable project of use and re-use should guarantee the territorial accessibility to the historical ruined site facilitating the achievement of the building both by public and private means of transportation. Reserved parking spaces for people with special needs should be provided;

6.10 The project must comprise a scheduled and continuous plan of after-work inspections and maintenance operations.

## **Action 7: Promotional and finalisation activities**

7.1 The last step in the realization of an efficient management form for a cultural site is to promote it and to shape it in the most proper way, being the site devoted to be a touristic attraction or a cultural site in itself.

7.2 When the abandonment of cultural built heritage put at risk its conservation, existence and identity, adaptive reuse projects become unavoidable, but this does not necessarily mean to find a new exploitation use. Sometimes non-use projects have more sense. Non-use, but conserving a ruin provides territorial stakeholders with valuable assets capable to produce important externalities. Their attractive power for tourist, citizens and creative industries, must be understood as a real socio-economic asset.

7.3 In order to increase the number of visitors, it is necessary to provide a valid market analysis, that takes into account the desires and the consistence of the public that could eventually be interested in the managed monument or site. Understanding the behaviour of tourists and visitors can be difficult, but having an insight is crucial to successful marketing.



7.4 The first step concerns mainly the site in itself, assessing its quality, availability, its location and accessibility and, lastly, the price. Secondly, it takes into account some external factors, namely some stimuli coming from the everyday world that forces the final result of the product in order to respond to the market's demand.

7.5 The second part is focused on the buyers'/consumer's habits and needs that in this perspective become crucial in shaping both the product itself as well as its communication campaign.

7.6 Then, the task for the business planner is to 'segment' its market, to identify the segments that it is likely to attract, and to 'differentiate' the range of products to match the demands of these different segments. There are a lot of methods to segment the public of a cultural site, and they relate to a number of factors. Basically, they could be demographic, behavioural, psychographic, and geographic.

7.7 Shaping the cultural offer of a managed site and the marketing campaign must relate with the data obtained in the previous analysing phases, from the identification of the market's desires to the segmentation of the possible public.

7.8 In modern times, web and social marketing play a crucial role, especially for the younger segments of the public. It is important to use these instruments in the proper way: the choice among digital and social marketing basically depends on the type of site the organization relies about and which market sector is the most targeted. It is important to know the differences between the different marketing theories so that you can select the most appropriate tools to use in your campaigns.

7.9 As well as for the management and the business plans, also the marketing plan needs to use in a circular way several steps, such as planning, implementation, output, outcome, monitoring, adjusting.