

# GUIDELINES FOR ELABORATION OF PLANS OF MANAGEMENT, USE AND PROTECTION OF HISTORIC RUINS

---

D.T4.1.1

04/2019

---





## Guidelines for elaboration of plans of management, use and protection of historic ruins

### Introductory issues/characteristics of the management plan

The Management Plan is developed and implemented as part of the management system operating in a given place/country. The management plan in the legal systems of the monuments protection is not an obligatory document. The management plan is a long-term strategic document that should cover all the basic issues related to the protection and management of a given site.

The management plan should be treated as a tool that should serve to optimize conservation activities, but also as a document which indicates ways to manage, use and develop a site and its use for the public purposes.

With such basic assumptions, a certain model of the structure of the management plan with its essential elements can be proposed<sup>1</sup>. The proposed model of the management plan consists of three main parts, which cover the entirety of issues related to the protection and management of the cultural heritage.

#### **PART I - DIAGNOSIS**

- 1. Characteristics of a site**
- 2. Characteristics of the value of a site**
- 3. Characteristics of the state of a site**

#### **PART II - CHARACTERISTICS OF THE SYSTEM OF PROTECTION AND MANAGEMENT OF A SITE**

- 4. Components of the protection and the management system of a site**
- 5. Threats and monitoring of a site**

#### **PART III CHARACTERISTICS OF USE OF A SITE**

- 6. Characteristics of stakeholders of a site**
- 7. Presentation, Sharing, Education, Tourism**

---

<sup>1</sup> The structure of Management Plan has been elaborated and presented in monographs: B. Szmygin, *Światowe dziedzictwo kultury UNESCO - charakterystyka, metodologia, zarządzanie*, Warszawa-Lublin 2016



The development and implementation of the management plan can be considered as the introduction of a standard for the management of selected historical objects of a special value, which is to improve the quality of protection and management at the level of a particular site.

*A management plan is a document that presents a comprehensive vision of the assumptions, objectives, methods and instruments for the protection and management of a given site*<sup>2</sup>. It is a long-term document, of strategic importance for defining the policy of protecting, using and managing a site.

The management plan should be comprehensive - it should take into account all the major factors that affect (or may affect in the future) the site and take into account the various activities and tasks that the manager (interacting with stakeholders) should undertake and perform to meet the stated conservation and management goals .

A management plan is a document that should be prepared by the manager of a site (or in close consultation with the manager), because the manager is its main contractor.

The management plan as a long-term strategic document should assume a certain type of flexibility resulting from the changing economic, social, and political conditions.

## PART I DIAGNOSIS

### Introduction

Part I of the Management Plan referred to as the "Diagnosis" is an in-depth presentation of a site and definition of its value. This is an indispensable step in the process of creating a management strategy that requires a comprehensive recognition and understanding of the essence of a given site. Characteristics of the site, determination of its value, both in the dimension of the scale of comparison with other sites in a given category, as well as in the internal context, own structure of the property value, indication of attributes of values and reference to problems of integrity, authenticity, and preservation of the site, are the basic activities through which the data is sorted out, which then allow to construct a rational protection strategy developed in subsequent parts of the study.

The quality and effectiveness of the management strategy depend on the correct definition of the value of the site and the proper separation of the attributes of the value.

The part I "Diagnosis" focuses on a comprehensive presentation of the value of a site. This is extremely important because the task of protecting these values sets the goal of actions covered by the management plan, while defining the meaning of the proceedings, which is a fundamental statement in the protection management of cultural sites. Defining a set of values constituting

<sup>2</sup> Ibidem, p. 221



the essence of a site is also necessary to indicate the opportunities and threats associated with them, which is the subject of findings in subsequent parts of the study. It is also an indispensable starting point for building a monitoring system of a site, and indirectly also monitoring the effectiveness of activities covered by the management plan.

Thus, "Part I Diagnosis" focuses on the characteristics of the site, to specify the purpose of the management plan, which is understood as an indication of optimal actions for protection, ensuring the durability of specific values of the site, while maintaining the functionality - active and positive presence of a site in contemporary social processes and economic development<sup>3</sup>, which finally appears to be a prerequisite for effective and socially acceptable protection<sup>4</sup>.

The development of the part "I - Diagnosis" requires:

- participation of specialists in the field of protection of cultural sites,
- field prospecting of the site, making photographic documentation of the current state,
- comprehensive acquaintance with the current state of research on a given site,
- close cooperation with the manager - the host of the site in the recognition of conditions and verification of arrangements.

The available materials, published and unpublished papers should be used, which are at the disposal of stakeholders of the management process.

Pragmatics of developing this part do not involve conducting specialized research, supplementing the recognition state of a site through in-depth studies, e.g., historical, urban or landscape. In the case of deficiencies in the recognition of a site in a given field, the indication of their completion appears as a request and postulate to the stakeholders of the management process in the final part of the Management Plan.

The adopted structure and methodology of the study make it possible to systematize information about a given site and define its value in accordance with the standards applicable in the UNESCO world heritage system, i.e., a group of sites of the highest value in the scale of human civilization. The adoption of such standards in relation to site with a potentially lower value allows for the actual verification of this value, secondly, it leads to the construction of a management system appropriate to a certain rank of a site.

## 1. Characteristics of a site

This is an introductory chapter that should be developed synthetically, using the basic and the latest literature of the subject and in relation to the findings of the field vision of the current state. The characteristic of the site serves to gather information necessary in the subsequent

<sup>3</sup> This statement does not mean that the site at any price is to become an autonomous source of income, e.g., a company in the tourism industry system. The role of a site can remain in the sphere of perfect contemplation, memory, landscape phenomenon, but in each of these cases, the ties with the social and economic systems can be seen and defined, for which even "isolated" or "access limited" site can/should be a partner.

<sup>4</sup> This "active" aspect of protection has already been given a role in the classic doctrinal document of the protection of monuments, which is the Venice Charter. This concept is continuing and developing in contemporary doctrinal statements, such as the HUL Recommendation.



stages of valuation and identifying attributes of values. The characteristic answers questions about the historical, artistic, and scientific value of a given site. Since the objects of interest (management) are objects, groups or monumental areas, historical conditions are of fundamental importance for the characterization of the site.

In accordance with the requirements of the analytical method, the element of a characterization of the site is a specialist description, taking into account both:

- spatial conditions,
- form,
- special properties of a given site <sup>5</sup>.

Due to the specificity of the management plan, the specific separation of the characteristics of the property requires the following issues:

- borders of the site,
- function of the good,
- ownership conditions.

Hence these issues are distinguished in particular subsections of the characteristics of a site.

The characteristics of a site is enclosed by the subsection "conclusions and recommendations" in which the reflections resulting from the basic identification of the site are gathered. These findings will be recalled again in the summary of the study and will be used to draft the conclusions and recommendations of the final management plan.

### **1.1. Historical characteristics of a site**

In the sphere of protection of cultural site, works and areas of significant historical importance, which results from their historical, artistic or scientific values, and the preliminary element of the characteristics of the site must be the historical recognition. With reference to published historical studies (especially monographic studies of a given site), cartography and historical iconography as well as available conservation analyzes, it should be presented in a synthetic form:

- historical and cultural genesis of a given site (the historical - cultural background that conditioned the creation, development, evolution, form, and functioning of the past and contemporary of a given site).
- chronology of the creation, development, transformation of a site in its physical form in close connection with the chronology of the functional evolution of the site.
- depending on the nature of the separation and a more detailed discussion, a specific historical thread related to the specific properties of the site may be required, e.g., a relationship with important ideas, beliefs, social theories (e.g., idea of the social utopia,

---

<sup>5</sup> We refer here, depending on the specifics of the site, to the scientific workshop on the history of urban planning, architecture, garden art, art history, archeology or landscape architecture, but the nature of the description must be subordinated to the logic of the document. The description is to lead to the separation of the attributes of the value, and finally to formulate and justify management recommendations.



the concept of the ideal city, the philosophical or religious doctrine, the military or humanitarian concept), or connection with outstanding historical figures (creators of the site, its users, but also researchers or authors of artistic reflections), or characteristics of specific functions of a site (discussion of the specificity of a specific economic field, which is specific to the characteristics of the site - e.g., mining of raw materials, production specialty, military, cult or representation function).

The historical characteristics of a site should form the basis for clarifying the scope of the field of the site, showing the stages of development and transformations of its formal structure, and should contain information showing the functional conditions of a site in both historical and contemporary perspective. This is information that will then be used to determine the value, integrity and authenticity of the good, and ultimately defining the objectives of protective measures.

The historical characterization should lead to the identification of conditions of the current state, identifying social, political, and economic processes to which site belongs and is subjected.

An important element included in the historical characteristics should be the facts related to the perception of the value of a site, establishing the status of a historic object, and the activities and conservation concepts related to the goods.

## **1.2. Formal characteristics of a site**

The formal characteristics is a part of the process of documenting a site for analytical purposes. This characteristic should be carried out by the authors of the management plan in the first place on the basis of the current field prospectus and data provided by the administrator - the owner of the property and obtained from specialist studies remaining under his control.

The formal characteristic concerns the current state of the site, taking into account contexts and historical conditions. Repetitions should be avoided as a result of the historical characteristics of the site contained in the previous chapter, while the indication of the dependence of the current state and historical conditions is justified.

The formal characteristics require the presentation of:

- 1.2.1. Location of the site
- 1.2.2. Description of the site
- 1.2.3. Discussing the boundaries of the site
- 1.2.4. Characteristics of the function of the site (historical and contemporary)
- 1.2.5. Characteristics of the property state of the site (historical and contemporary)

Data should be presented synthetically, so that they can be easily linked to the management issues in subsequent parts of the study.

It is important to choose illustrations (plans, projections, photographs), which should complement and shape the text part of the formal characteristics, and especially the description



of a site. This part of the study should be the most intensively saturated with illustrations correlated with the text.

**The subsection "Location of the site" should include:**

- geographical location - definition of the region, sub-region, according to the physiographic classification, indication of the relevant elements of landform and coverage, relation to the communication network (historical and contemporary), water network and other relevant physiographic factors influencing the functioning of the site (e.g., climate issues, or determinants of the development of specific economic activities - trade, cultivation, extraction, etc.). The obvious complement to the information should be sections of maps showing the location on the macro, meso, and local scale, as well as illustrations showing the location and layout of elements of the site.
- location in a landscape context, which in the basic framework results directly from geographical conditions, but requires additions, with the display of particularly important for a given characteristic feature of this landscape (if any).
- location in the administrative and legal sense - determination of nationality and location of subsequent levels within the field administration units. The basic information should concern the current status, however, in justified cases (e.g., particularly historically complex) it can also refer to the historical situation. It is important to precisely determine whether the site falls within specific administrative boundaries in its entirety or whether it is divided between different units of local administration (state, local government, but also special, e.g., in the case of religious sites, administration of a given religion).
- cultural location - in this case it should be considered whether the site is situated within the boundaries of a specific historical land, the ethnographic area, or the area of particular historical conditions that are related to its character. This is a reference to the "spirit of the place" present in the conservation doctrine<sup>6</sup>. Attention should also be paid to the context of the "cultural space", which is increasingly taken into account in the deliberations on intangible heritage<sup>7</sup>.

**The subsection „ Description of the site”:**

Individual disciplines co-creating substantive facilities for the protection of cultural sites have developed their own systems for describing sites/goods of a particular type. History of the art, history of architecture, urban planning, rural studies, landscape architecture, history of gardens, archeology, history of engineering and technology, or monuments science use appropriate descriptions, language and terminology suitable for the discipline and subject of research.

In the case of a management plan, the description of a site must on the one hand be as synthetic as possible, and at the same time appropriate in terms of content, on the other hand it should be prepared in such a way that even the reader who does not have the full conceptual apparatus

---

<sup>6</sup> Declaration on the genius loci preservation (the spirit of a place), Quebec 2008, Vademecum of the Monument Conservator, ed. B. Szmygin, Warsaw 2015, s. 179 - 182; <http://bc.pollub.pl/Content/12727/PDF/vademecumpl.pdf>

<sup>7</sup> The UNESCO Convention on the Protection of Intangible Cultural Heritage, done at Paris on October 17, 2003, art.2, par. 1. [http://niematerialne.nid.pl/Konwencja\\_UNESCO/Tekst%20Konwencji%20o%20ochronie%20dziedzictwa%20niematerialnego/index.php?sphrase\\_id=9351](http://niematerialne.nid.pl/Konwencja_UNESCO/Tekst%20Konwencji%20o%20ochronie%20dziedzictwa%20niematerialnego/index.php?sphrase_id=9351)



of the discipline can use it. It results from the essence of the document, which is to serve both professionals and the general public, politicians, local governments, or enthusiasts of the history of the area.

The description of a good is created in accordance with the rules of the inventory descriptions appropriate for a given monument category (e.g., urban planning, architecture, greenery compositions, or archeology). We pay attention to the brevity and desirability of the description - it is finally intended to illustrate or possibly verify the adopted management strategy by allowing the identification of individual components of the site.

The description should be constructed from the general to the detail. From the general disposition of a given site in a space, through the specification of components and their mutual relations, to the characteristics of particular elements of a given site. If possible, we should seek to synthesize the information. For example, repeating elements, ornaments, details should be collectively discussed, and not repeat these data with the characteristics of subsequent, individual components of the assembly.

The description should not repeat the information contained in the historical part, but should make it possible to perceive the layers or the historical structure of a site.

The description should refer to the existing state. It should generally take into account the state of preservation and the function of objects. The description should indicate the places of losses - shortages of elements of a given site, which are important in a historical, compositional or functional perspective.

It should be remembered that the description is one of the ways to bring the essence and form of a given site to people from outside the circle of specialists in a given field.

### **Discussing the boundaries of the site**

Due to the importance of delimitation for the identification of a site and for the management and protection process, the boundaries should be analyzed and presented separately.

The role of the boundaries of the site, the range of its surroundings, possible protective zones (buffer), is one of the key protection problems. It is inseparably connected with the problems of the integrity of the site, and partly also with the issue of authenticity<sup>8</sup>.

<sup>8</sup> Operational guidelines for the implementation of the World Heritage Convention (WHC.15/01 of 8 July 2015): art. 99. Defining the boundaries of a good is a basic requirement in establishing effective protection of candidate goods. The boundaries should be designated so as to guarantee a full reflection of the unique universal value of the good and its integrity or authenticity





For sites of a special value, reference should be made to the pattern of the World Heritage pragmatics. For this category of sites, the significance of the boundaries of a site is defined extensively in the Operational Guidelines for the implementation of the World Heritage Convention (WHC.15/01 of 8 July 2015)<sup>9</sup>. At the same time, the "Guidelines" indicate how the protection boundaries of a site should be drawn in order to obtain the "effective protection". The Article 100 provides: *In the case of sites declared for inclusion in the List due to the criteria (I) - (VI) /cultural criteria/, the boundaries should be determined taking into account all those areas and attributes that are a direct, tangible expression of the unique universal value of a site, as well as those areas which in the light of future research possibilities will potentially contribute to cognition and provide a better understanding of the good.*

In addition, to clarify the area relevant for defining the good and its protection, the problem of the environment, the protection zone, and the pragmatics of world heritage known as the buffer zone should be taken into account. Its character is defined in the Article 104 of the "Operational guidelines", which states: *The buffer zone, established in order to effectively protect the site which candidate to enter the List, is the area surrounding the site in which case complementary legal or customary restrictions imposed on the way of use and development of this area have been introduced in order to supplement the protection with an additional layer. The zone should encompass the immediate surroundings of the candidate site, important views and other areas or attributes that have a functional meaning for the site and its protection. The areas forming the buffer zone should be determined in each case by appropriate mechanisms. The application should contain information such as details on the size of the area, characteristics and acceptable forms of use of the buffer zone, as well as a map with the exact boundaries of the site and its buffer zone.*

For the considerations about the boundaries and their character, the statements of the Article 112 are also inspiring of the *Operational guidelines for the implementation of the World Heritage Convention*, which combine the problem of management with a broad understanding of spatial dependence and protection of the site. It also indicates a multi-dimensional understanding of the boundaries, referring to the intangible sphere and various socio-economic-spatial processes<sup>10</sup>.

The boundaries of a site should be presented in descriptive form and on maps on a scale adequate to the specifics of the site.

<sup>9</sup> Operational guidelines for the implementation of the World Heritage Convention (WHC.15/01 of 8 July 2015): art. 97. All goods listed on the World Heritage List must be provided with adequate long-term legal, regulatory, institutional or traditional protection and management aimed at preserving them. This protection should take into account appropriately delineated boundaries of the good. /.../; <http://swiatowedziedzictwo.nid.pl/media/uploads/dokumenty/wytyczne-operacyjne/wt-operacyjne-pol/wo2015-tekst-glowny-pl148421293082.pdf>

<sup>10</sup> Art. 112. of the *Operational guidelines for the implementation of the World Heritage Convention: Effective management includes a series of short, medium and long-term actions undertaken to protect, preserve and present the good, which is the candidate. An integrated approach to planning and management is essential to manage the evolution of goods over time and to ensure that all aspects of their unique universal value are maintained. This approach goes beyond the limits of the good and includes both each buffer zone (buffer zones) as well as the wider environment. Wider surroundings may refer to topography, natural and built environment, as well as other elements such as infrastructure, land use model, spatial organization or visual relations. It may also include related social and cultural practices, economic processes and other intangible dimensions of heritage, such as feelings and associations. Managing a wider environment is related to the role which it plays in supporting the unique universal value.*



The presentation of the boundaries of a site should take into account the historical and contemporary state. At the same time, any existing boundaries of an administrative, proprietary and legal nature (e.g., boundaries of the conservation protection zones or nature protection) need to be indicated.

When defining the boundaries of the site, a compositional and functional context must be taken into account. Traditional connections between a site and other components of a space and the role of the site in the landscape, i.e., the boundaries of scenic relations. In view of the multiplicity of the boundary categories in question, it is necessary to highlight those that are essential for the identification and protection of the property.

The formulation of conclusions regarding the mutual relation of physical boundaries - the identified form of property and the limits of established protection is important for the management plan. The ratio of these ranges and their properties is a particular problem of considerations within the formulation of management strategies.

#### **Characteristics of the function of the site (historical and contemporary)**

Functional characteristics of a site should partly result from the historical characteristics and description of the site. However, due to the importance of the function for the use and management of a site, it needs to be discussed and exposed separately.

The leading function and complementary functions of a given site should be presented in a historical and contemporary perspective.

In the case of complex, multifunctional sites, gradation of functions should be presented depending on the leading activities within the boundaries of a given site. For example: historical city - industrial city - production, commercial, and residential functions - complementary functions (e.g., transport, education, sacred, recreation).

It is important to capture the processes of the function evolution, e.g., gentrification of the historical downtown of the city, or commercialization of open spaces - the cultural landscape.

It is important to distinguish between primary and secondary functions and the indication of permanent and ephemeral functions. In the case of a characterization of the existing state next to the function catalog, objects, areas, assemblies temporarily devoid of functions should be indicated - in different ways and to a different extent excluded from functioning in a given area of interest.

For further analyzes and formulating management conclusions, it is important to determine which functions of a given site result from its nature, and are an internal element of the site (e.g., local prayer function) and which are derived from the influence of various external factors (e.g., place on the cross-border pilgrimage route to a distant sanctuary that works thanks to the success of the destination...).

#### **Characteristics of the property state of the site (historical and contemporary)**

The Polish legal system, like most systems originating from the European tradition, makes the owner responsible for the fate of the object - the site. Characteristics of ownership status of the



site are the basis for recognizing the significant conditioning of management and protection processes.

The current state of ownership is important for the management processes. However, for historical characterization, and often for an understanding of a number of cultural conditions, it is necessary to learn about the historical structure of ownership and its transformation.

In the case of complex sites with a multi-element structure and multiple ownership divisions, systematized data on the ratio of public, communal, institutional, and private property should be presented. Identification of private owners is not expected. It is recommended to visualize data in the form of plans and maps on a scale adequate to the character of a site.

### **1.3. Conclusions and recommendations**

Part 1 - Characteristics of a site should be ended with conclusions and recommendations resulting from the initial recognition of the site. Historical and formal characteristics allow to articulate initial conclusions useful in the subsequent evaluation process, especially as to the typological and chronological specificity of the site. The characteristics of the location of a site, description, boundaries, functions, and status of the property (historical and contemporary) are a site introduction to formulating preliminary conclusions in the field of valuation, but also the state of protection or the state of presence of the site in contemporary social and economic processes.

Bulletin of conclusions and recommendations in the preliminary stage of the study is aimed at the current observation of the reflections, which are combined with the presented characteristics, and will be the subject of further considerations in the strategic parts of the proposal. There is a phenomenon of repeating statements about the nature of conclusions and recommendations, which will appear again in the following parts of the study. However, this repetition on the one hand involves reflection with analytical material, and on the other hand, in the further parts of the study, it allows to build a coherent message of a strategic and managerial character.

The conclusions should result directly from the presented analyzes and descriptions, they should be formulated concisely and should relate to issues related to the valuation of the good, its authenticity, integrity, and functional - protective issues.

## **2. Characteristics of the value of a site**

This is the most important element of the analytical part of the study. Properly carried out characterization of the value of a good determines both the further perception of the good and the directions of considerations aimed at developing a protection strategy<sup>11</sup>. It is justified to

---

<sup>11</sup> Szmygin B. Theory and criteria of heritage evaluation as the basis for its protection. *Wiadomości Konserwatorskie - Journal of Heritage Conservation* 2015;44:44-52.



refer to the developed systems of valuation and expressing values through attributes, which means methods perfected in the world heritage<sup>12</sup>.

The basis of the action is the assumption that monuments cannot be evaluated on an absolute scale, but only on the scale of references appropriate for a given typological group. Separating the proper comparative group is therefore a preliminary task, which then allows external valuation, on the scale of the resource of a specific type of historic buildings.

The analysis process of a site leading to the characterization of values aims to dissect the attributes of values, which in the next parts of the report become the basis for the construction of protection and management strategies.

## **2. 1. Characteristics of features of a site that are important for determining a comparative group**

To determine a comparative group that allows the value of a given site to be assessed, it is necessary to precisely determine the nature of the site. Also, understanding and presenting its leading features that can be benchmarked in relation to other objects in this category.

In view of the complexity of the nature of site with the highest value, it is advisable to stratify the analysis fields and present them in the following thematic areas (scales of observation):

- Spatial scale
- Building scale /architectural scale/
- Detail scale /movable monuments/
- Function of the good /intangible values/

The characteristics of a site in the given scales should be made to distinguish features that will ultimately be helpful in defining the evaluation criteria and in extracting the attributes of values.

The information presented in the introductory chapters are subjected to the synthesis process, which allows to indicate conclusions on both the attributes of values, areas, and activities relevant to the strategy of protection and management of a site.

### **Spatial scale**

It refers to the relation of a given site with the space in which it is situated, with the manner of distribution, extension, and incorporation into the landscape.

The following factors should be taken into account:

- historical location,

<sup>12</sup> Szmygin B., Światowe Dziedzictwo Kultury UNESCO - charakterystyka, metodologia, zarządzanie, Lublin - Warszawa 2016.



- type of landscape (e.g., urban or fortified),
- a system of historical communication systems,
- disposition of public spaces,
- historical greenery compositions,
- relations of building areas and water system,
- other, spatial attributes appropriate for a given good.

In relation to each of the factors, the original features of a given site should be considered, it should be answered the question of how the characteristics of a good under investigation look in a given category.

#### **Building scale /architectural scale/**

The building scale entered in the spatial scale should be analyzed by means of the typological stratification of the buildings (e.g., the permanent ruin, residential buildings, military architecture) and specification of special features that distinguish the development of a given site among others (limiting possible reference points - specifying a comparative group).

Special features can be noticed in the chronological as well as formal or functional specifics of a given building.

#### **Detail scale /movable monuments/**

Another scale of approximation is the analysis of the scale of the detail or equipment elements of a site. The search for distinguishing features should be carried out in the chronological (stylish), formal (artistic values and typology of movable monuments) and functional contexts, in the case of sites with complex functionality or distinguishing functions (e.g., in the case of technical monuments or equipment of a sacred complex of significant cultural significance).

Architectural detail can be divided into two categories - elevation (visible in urban space) and internal, accessible only after entering a given building.

Movable monuments, usually mainly interior furnishings and inventory of collections or museum collections can significantly relate to the characterization and valuation of a site, or merely complement its specificity, remaining in the sphere of repeatable solutions with limited artistic, historical or scientific value.

#### **Function of the good /intangible values/**

For both the characterization of the value of a given site and the separation of a comparative group, the functional characteristics of a given site play a significant role.

Leading functions should be defined as precisely as possible - significant functions in the characteristics of a site and link them with the formal characteristics of the site.

An intangible value exists in many forms, from historical values, through relationships with significant figures or ideas, the importance of a given site in the perception of a local or supra-local community, identity functions, embedding in a cultural space, or culture-creating functions.



## 2.2. Identified values of a site

In this part, reference should be made to documents (particularly of protection forms) and literature on the subject, and to distinguish the current approaches to the definition of the value of a site.

As a summary of the findings presented, a list of values that characterize the site on the basis of the above-mentioned sources should be compiled, but also with reference to the analysis carried out for the purposes of the study.

It is important to see the original values of a given site in standard reference scales, e.g.:

- historical values - the specificity of the place, the ideological context;
- historical values - functional context;
- urban and architectural values;
- landscape values;
- artistic values.

The summary of this part should be the indication (definition) of the superior value - leading to the characterization of a given site.

## 2.3. Determination of the type of a site and indication of the reference group constituting the comparative context

The identification of the category of a site, the definition of a typological group for a given site, is a necessary condition for completing the analysis of the valuation of the site.

The Convention on the Protection of the World's Cultural and Natural Heritage divides cultural heritage into three groups:

- 1) *monuments: architectural works, monumental sculpture and paintings, archaeological elements and structures, inscriptions, caves and groupings of these elements, which have an exceptional universal value from the point of view of history, art or science;*
- 2) *assemblies: separate or combined structures, which due to their architecture, uniformity or fusion with the landscape have a unique universal value from the point of view of history, art or science;*
- 3) *historic sites: man-made works or works of man and nature, as well as zones and archaeological sites, of exceptional universal value from the historical, aesthetic, ethnological or anthropological point of view*<sup>13</sup>.

The reference to the above division is the first step in shaping the reference group.

---

<sup>13</sup> Convention on the Protection of the World Cultural and Natural Heritage, adopted in Paris on November 16, 1972 by the United Nations General Conference for Education, Science and Culture at its seventeenth session. (Journal of Laws of September 30, 1976), I. Definition of cultural and natural heritage. Article 1. [http://www.unesco.pl/fileadmin/user\\_upload/pdf/Konwencja\\_o\\_ochronie\\_swiatowego\\_dziedzictwa.pdf](http://www.unesco.pl/fileadmin/user_upload/pdf/Konwencja_o_ochronie_swiatowego_dziedzictwa.pdf)



Additional criteria for selecting comparisons are:

- chronology of the uprising,
- development motives,
- design,
- materials,
- territory,
- historical function.

#### **2.4. Defining the evaluation criteria - verifying the features defined as the basis for valuation**

The rational design of the management plan requires the hierarchisation of the value of a site and the recognition of the attributes of this value. They are derived from the features identified as the basis for valuation.

Verification of the features defined as the basis for valuation occurs by comparing the given site with others from the resource that belong to the same typological categories.

Comparative analysis on the scale of a typological resource enables the hierarchisation of site and shows the original value against the background of related sites.

It is a way to verify and finalize the definition of the value of a given site.

#### **2.5. Analysis of the value of a site - defining attributes of values and assessing their authenticity and integrity<sup>14</sup>**

The result of the analysis of the value of a site should be the identification of attributes - understood as the key features and elements of a good that are decisive for the assessment of its historical value.

According to the methodology of World Heritage included in the Operational Guidelines for the implementation of the World Heritage Convention, it is necessary to assess whether the selected attributes meet the condition of authenticity and the condition of integrity - so important in assessing the value of the World Heritage property.

A tabular list of attributes ranked into categories can be used, referring to: spatial scale, architectural scale, scale of detail, and scale of intangible heritage.

---

<sup>14</sup> Defining and understanding a good /in:/ Preparation of applications for entry on the World Heritage List - Guide - UNESCO World Heritage Centre, Warsaw 2011, s. 59 - 97.



## Attributes and their contexts

Attribute category	Attribute	Attribute elements	Characteristics of attribute elements	Evaluation of authenticity	Integrity assessment
--------------------	-----------	--------------------	---------------------------------------	----------------------------	----------------------

### 2.6. Conclusions and recommendations regarding the need to conduct further scientific and research works related to getting to know the site

Concise conclusions indicating the areas and research problems important for clarifying the essence of a site, its monument characteristics, historical, artistic, and scientific value, intangible assets, state of preservation, authenticity and integrity, or functional characteristics in a contemporary or historical context.

The result of reflection related to the review of the state of research and an attempt at a comprehensive characterization of a site.

Recommendations focused on activities aimed at building a protection and management strategy of a site, identifying problems related to conservation issues.

### 2.7. Conclusions and recommendations on how to deal with a site

Summary of the characteristics of a site indicating the purpose and sense of management and protection activities related to the pursuit of maintaining the value of sites revealed as a result of analyzes and comparisons.

Conclusions and recommendations systematized in relation to the category of attributes and attributes of the value of a site.

This part should define the strategic goal of management and protection activities as well as intermediate goals for the implementation of the target vision.

## 3. A brief characteristics of the condition of a site

The third part relating to the state of a site should be developed on the basis of available analyzes and conservation expertises at the disposal of the owner of the good, conservation offices, and on the basis of interviews with the host of the property and its users and with reference to field publications. Such collected material requires confronting with the current state of a site assessed on the basis of a field prospecting.

The state of a site is understood broadly - both in the sphere of behavior and completeness of elements determining its value, as well as in the sphere of technical condition that determines the functionality and safety of the site.





It is not planned for the needs of this characteristics to carry out own research, outcrops, and expert opinions. An indication of the need to perform this type of research or diagnosis may be included in the conclusions and recommendations of this part of the study.

### **3.1 The condition of the historical substance**

This is a summary of a recognition of historical character referring to the issues of integrity, completeness, authenticity, as well as the relation of historical substance and contemporary stratifications<sup>15</sup>.

We perceive the site as a historically and comprehensively motivated whole composed of elements contributing to its essence (e.g., urban complex, a complex of buildings, a specific cultural landscape, or a complex of monuments of technology related to historical dependencies).

First of all, the site is assessed in its entirety, then the individual components of the site.

The condition of the historic substance should be considered on a macro scale, i.e. landscape, composition - urban (rural), archaeological, as well as on a local scale, i.e., individual elements of a site (architectural, detail and equipment, functional).

In the analysis of the historic condition of the substance, the problem of intangible assets should be taken into account, the degree of their preservation, readability, connections with particular components of the site.

The synthesis of information should be sought.

Characteristics should be collective, brief, giving an overview of the general structure of the site and key processes in its components.

The applications may include indications necessary to perform analyzes, studies, expert opinions, treated as a forward-looking program, which is intended to supplement the shortcomings of the site characterization and periodic updating of the management plan.

### **3.2 Technical condition**

It is a summary of the technical-conservation diagnosis referring to the problem of preserving the readability of the composition of a site, but first of all to the state of preservation of the structure and matter of the individual components of the site.

This part should be drawn up with reference to the documentation that is at the disposal of the host of the site (analyzes, expert opinions, periodic reviews, intervening information) and the current field review of the site.

The barges found in the documentation of a site should be displayed in the part "conclusions and recommendations", as recommendations for performing specific tests or analyzes.

<sup>15</sup> B.J. Rouba, Autentyczność i integralność zabytku - wyzwania konserwatorskie, [w:] Zamki, grody, ruiny. Waloryzacja i ochrona, Warszawa-Białystok 2009, s 100-110.



Analysis and conclusions should be ordered in a sequence from general to specific, including the system of attributes and their physical form.

Determining the technical condition of a site is particularly important for the next stage of identifying areas and mechanisms of threats and spheres of monitoring the site, and above all for protective actions, the aim of which is to preserve the site in its form that carries value.

### **3.3 Conclusions and recommendations defining conservation tasks resulting from the assessment of the state of a site**

Conclusions should answer questions about the state of preservation of substances and technical properties, and presented in connection with the value attribute system, so that these conclusions and recommendations can be used more easily in the part of the strategic study.

Conclusions should contain a list of tests, expert opinions, condition evaluations, studies, which task is to complete or cyclically update data on the state of preservation of a site.

The conclusions and recommendations should include a catalog of the main activities - renovation and conservation works, investments that are important for the preservation and protection of the property.

Proposals should include a valuation answer (site state, bad state, threat state, etc.) on the question of the state of site preservation in terms of value, function, and technical condition.

The conclusions of this part are a direct reference and introduction to the strategic part of the management plan.

## **PART II**

### **CHARACTERISTICS OF THE SYSTEM OF PROTECTION AND MANAGEMENT OF A SITE**

The second part of the management plan is a comprehensive description of issues related to the system of protection and management of the cultural heritage, in the context of a specific object being the subject of a management plan. This part should include the characteristics and analysis of components that make up the protection and management system at the national and local level, as well as issues related to threats and monitoring.

Programming a development while maintaining the value of a good is one of the main goals of the management plan. A management plan should be not only a tool that protects the value of a good and improves the mechanisms for this purpose. An equally important goal of the document is to properly use the good that is to be used for development. Therefore, the important task of the plan is to identify national and local conditions that affect or may affect planned use and development.

The management plan is an integral part of the protection and management system, therefore it must be based on the assumptions of a functioning national and local protection system (including legal, financial, organizational issues, etc.).



At the same time, the management plan may also include such tools and instruments that, as a part of the adopted protection and management system, will improve the operation of certain mechanisms functioning under this system, in order to optimize protection, use, and development of a good.

The management plan is prepared for a particular good (monument), but it should be remembered that every property functions in some environment, both in the sense of the area surrounding it, as well as in the understanding of social, political, and economic conditions. Therefore, the management plan should also include such a broadly understood surroundings and environment. Firstly, in the case of historical ruins, their location in the landscape is an extremely important element, both in the assessment of the value of the good, as well as the possibilities of use and management, therefore the management plan should refer to the wider spatial scale. Secondly, each object functions in a complex, usually dynamically changing, external environment, therefore the conditions of this environment must be included in the management plan.

#### **4. Components of the protection and management system of a site**

##### **4.1. Regarding the characteristics of the elements of the national protection and management system:**

- the applicable national legal regulations regarding the protection of monuments and the care of monuments should be indicated;
- the applicable national legal regulations regarding landscape protection and nature conservation should be indicated;
- the current forms of legal protection, specifying the subject and scope of the protection should be identified and characterized, and the current status of the good should be presented;
- institutions and procedures that regulate the protection and functioning of a property as a historic object should be synthetically described;
- principles and methods of financing/co-financing should be characterized:
  - current maintenance of the monument,
  - research works, renovation and conservation activities at the monument,
  - financing operations related to the use and development,
  - possible sources of financing from national resources;
- it is necessary to present the main goals, priorities and directions of state policy measures in the field of a monuments protection, which are included in the most important strategic documents that may affect the protection, use and development of a good; the management plan should take into account the coherence of the objectives of the management plan with the state policy.

#### **Conclusions and recommendations**

Proposals and recommendations should be formulated to optimize the protection and management of a good in relation to the national system, with particular emphasis on the subject, scope and boundaries of the protection.



#### **4.2. Regarding the characteristics of elements of the local protection and management system:**

- the property manager should be characterized taking into account his rights and obligations related to the maintenance and development of the historic facility;
- the existing forms of legal protection at the local level should be defined and characterized, defining the subject and scope of protection of the property and its surroundings - including the protection of monuments, spatial planning, protection of the cultural landscape, and protection of the natural environment;
- all protective and management conditions resulting from the duties and rights of local government units at various levels should be characterized;
- current sources of financing the good by the manager should be characterized;
- potential sources and possibilities of obtaining financial resources from the budgets of local government units at various levels should be identified;
- basic objectives, priorities and directions of policies of local government administration units at various levels in the field of the monument protection and management should be presented, included in the most important strategic documents that may affect the protection, use and development of a good (development strategies for voivodships, communes, towns, revitalization programs, monument protection strategies, nature protection strategies, tourism development strategies, cultural development strategies, etc.) - analysis of the coherence of the local development policy with the goals of the management plan.

##### **4.2.5. Conclusions and recommendations**

Conclusions and recommendations should be formulated to optimize the protection and management of a good in relation to the local system.

## **5. Hazard characteristics**

### **5.1. Characteristics (definition) of threats that should be identified and monitored**

The threat for historical ruin and its value may be a number of negative factors - natural factors as well as those caused by human activity. Identification and hazard characterization should be done for several separate issues. Effective management of a historical ruin (like other types of monuments) requires assessment, characterization and analysis of threats in three basic aspects - threats affecting:

1. directly for the good/attributes;
2. protection and management system;
3. surroundings and environment (in which the good is present).

It should be noted that the hazard analysis should be considered taking into account the negative factors that have already occurred (current threats), as well as those that may occur in the future (potential threats).



It is assumed that both threats and monitoring should be assessed and diagnosed using indicators understood as parameters that allow for the objectivity-related evaluation of changes and threats that may adversely affect the good and its value.

### 5.1.1. Threats directly affecting the historical ruin/attributes

The essence of the protection of the historical ruin should be the preservation of all values represented by previously identified and characterized attributes, and features that testify to its authenticity and integrity (quality of a good). With such a goal, the identification of threats to particular attributes, the assessment of their impact on the authenticity and integrity of the historic ruin, and the indication of preventive measures or rescue operations is an essential element that allows optimization of protective and management activities.

Identification of threats directly affecting a good can be presented in a tabular form defining indicators for individual attributes (identified and characterized in the first part of the management plan), occurring or potential threats to these attributes, and defining proposals to counteract specific threats, with an indication of the responsible unit/institution.

Attribute category	Attribute	Attribute elements	Indicator	Threat	Counteraction

### 5.1.2. Threats affecting the protection and management system

The second group of threats - real and potential - is related to all factors that have a negative impact or may affect individual components of the protection and management system. The system of protection and management of a good described (national and local) gives the basis for indicating the basic threats in this area. The identification of negative factors affecting individual elements of the national and local protection system is important, as threats in this area (although indirectly) may also contribute to adverse changes in the value of the good.

#### Exemplary threats to historical ruins in relation to the protection and management system

##### Doctrine and conservation pragmatics:

- deviations from the principles of a conservative maintenance, consolidating the ruins in the existing form and substances in favor of the tendency to various types and scope of investment activities, consisting in the reconstruction (most often partial) or conservation creation. The consent of a part of the conservation environment to reconstruction, contrary to the assumptions made in the theory.
- lack of standards developed in the area of:
  - methodology for assessing the technical condition and methods of a conservation intervention,
  - technical testing methods,



- methods and measures of securing and preserving the historical ruins
- acceptable forms of the use and management
- good management patterns

#### Threats resulting from legal regulations:

- lack of precise specification of the subject and scope of protection in the decisions on entry into the register
- no protection of the surroundings of a historical ruin or the inclusion of too little space within the protection limits
- no regulations preventing the complete reconstruction of a permanent ruin
- lack of rigorous law enforcement by the conservation services,
- threats related to leaving the ruin "alone" and ceasing to take any actions - primarily security works. Permission for destruction or lack of activities at the monument, leading to the degradation of its value, substance, and form - judgments of courts without penalty, due to low social harmfulness
- difficulties in maintaining standards and regulations resulting from the construction law, while simultaneously dealing with the matter of the monument in a manner ensuring the minimum necessary interference, in order to preserve the authenticity of form and the substance.

#### Risks related to financing:

- difficulties with maintaining the monument due to the specificity of the ruin and the lack of the possibility of introducing many commercial functions
- threats related to the financing (and settlement) of large investment and conservation projects - the need for too fast pace of work, which implies sometimes the implementation of works without full research and analysis that facilitate the making of optimal conservation decisions regarding the manner and scope of works.
- subsidies for renovations and maintenance works are too low in relation to the needs
- non-use or limited use of external sources of financing by the owners of historical ruins

#### Threats related to functioning and policy implemented by conservation services:

- way of implementing the conservation policy:
  - issuing decisions for undertaking renovation and conservation activities, omitting the pre-emptive (in relation to the activities) a wide spectrum of necessary research (primarily archaeological and architectural)
  - accepting the conduction of restoration and reconstruction works without scientific research foundations (including iconography), leading to the blurring of the fixed silhouette of the historical ruins
  - failure to enforce the absolute necessity (in relation to the activities) of conducting comprehensive research (primarily archaeological, architectural, landscape, and historical)



- permission to carry out repair and maintenance works, omitting professional conservation supervision
- undertaking investment activities (renovation and conservation) without a targeted vision of the manner of use, development and modern use of the historical ruins, its surroundings and cultural landscape
- undertaking renovation and conservation works in an ad-hoc manner, while omitting a deliberate, long-term strategy of protective measures
- non-use of an integrated protection - protection of the substance and historical form of the ruins as well as protection of landscape and scenic values - silhouettes, views "on and from the ruins", panoramas, perspectives, points and view sequences
- lack or insufficient cooperation with nature protection services in order to combine protective activities - protection of historical ruins and cultural landscape in connection with nature protection
- personal and professional issues, work organization etc.:
  - insufficient human resources - too few posts in relation to the number of cases, sometimes resulting in shortcuts
  - not always satisfactory competence of employees of the conservation services
  - lack of negotiating skills (soft skills) - excessive submission to the vision of the managers of the ruins
  - lack of additional education, participation in scientific conferences, knowledge of the current theory and practice recommended by the community;
  - operation under pressure of execution time and formal reception of works

Threats associated with the implementation of construction, renovation and restoration works on historical ruins:

- incorrect technical solutions during renovation works, resulting in inefficiency or too much interference and destruction of value
- lack (or insufficient in relation to the needs) of number of specialized, competent companies, carrying out repair and maintenance works
- replacing conservation activities on the historical matter (substance) of historical ruins with strictly construction-oriented activities
- lack of the professional conservation supervision



**Exemplary threats to historical ruins in relation to the local protection and management system**

Element of the local protection system	Threats
Manager of a good	Changes in the positions of decision-makers Lack or insufficient competences Improper management of human resources Misunderstanding of the meaning of the value of a good Excessive striving to increase profits at the expense of the commercialization of the ruin and its surroundings
Human resources	Reduction of employment Lack of appropriate qualifications of employees Internal conflicts
Local government	
Local law and strategic documents	Lack or insufficient consideration of the protection of ruins and its surroundings in the local zoning plan and strategic documents Lack of developed and enacted strategic documents related to the protection and management of heritage at the local, poviát, and voivodship level Disregarding the protection of ruins in strategic documents Lack of common, complementary activities of local self-government in the direction of protection, promotion and development of the museum, which are a reflection of the strategic planning
Financing	Lowering the subsidy of the founding body Not using external sources of financing

**5.1.3. Hazards affecting the surroundings and environment in which the good is located**

Threats affecting the surroundings and environment in which a good is located is another group of factors that should be identified and characterized in the management plan. This group covers a wide range of various economic, social, political, and demographic factors, etc. The manager of a good has no direct influence and the ability to respond to such threats on a regional and supra-regional scale, but he can and should take actions to minimize these threats at the local level.





### Threats in relation to the immediate surroundings and cultural landscape

The surroundings and landscape in which the historic ruin is located has a direct impact on various aspects of the functioning of the property (e.g., scenic relations, exhibition, direct transport accessibility, the course of tourist routes, functional link with other parts of the town, ecological cover, economic competition, investment pressure, depopulation or social degradation of the surroundings of the historic complex).

### Threats related to socio-psychological issues:

- perception of a historical ruin as a "worse" monument, which creates permanent protection problems and one that can not be used effectively, utilized for the purposes of social and economic development
- lack (or insufficient) education in the field of the monument protection, hence low social awareness of the specificity and values represented by the historic ruin
- identifying the value of a building/historic object with its aesthetic side (this point of view is also found in the conservation environment). "The monument has regained its former splendor/former glory" is a phrase that is very often used in media reports (also by representatives of the conservation services)
- strong investment pressure (especially among private owners of historical ruins) associated with reconstruction, in order to adapt the monuments to modern utility functions. Economic reasons - the rebuilt castle and new functions introduced in it in the opinion of the owners can bring faster the expected profit and prestige - the rebuilt castle is an expression of the owner's social position

Ideological issues - reconstruction of the historical ruins of castles is ideological and political determinant of conduction.

## **5.2. Monitoring of a site**

Within the meaning of management theory, monitoring is defined as regular qualitative and quantitative measurements or observations of the phenomenon carried out for a predetermined time.

The monitoring characteristics of a good should include:

- resource monitoring - monitoring of the state of a good and its values, the carriers of which are distinguished and characterized earlier attributes,
- monitoring of other factors that may affect the good and its environment (including components of the protection and management system as well as the use and development).

The monitoring should be carried out by the manager of a good (in terms of the state of preservation, the current protection system, threats) and specialized cooperating institutions.

The attribute monitoring allows observation and measurement (identification of trends) of possible changes affecting the good, in order to prevent factors adverse to the value of the site.



Indicators associated with specific attributes are primarily used to measure and assess factors that determine the state of preservation or threat to the value of a good. Indicators understood in this way are parameters that monitor particular attributes and serve to assess possible changes in the attributes status. Observation, measurement and examination of indicators defined for individual attributes allows for the assessment of the status of these attributes and gives the opportunity to adjust the strategy of action depending on the emerging threats.

Monitoring of the status of a good and its values, the carriers of which are distinguished and characterized earlier attributes, can be presented in a tabular form, taking into account the following elements:

Attribute category	Attribute	Attribute elements	Implementation (unit/institution responsible)	Monitoring indicator/ measurement method	Frequency of observation

Monitoring of other factors affecting the good and its surroundings implemented by the administrator of the good.

Name of the monitoring element	Name of the indicator	Measurement method
Management system		
Use and development		

### 5.3. Conclusions and recommendations

It is necessary to formulate conclusions and recommendations resulting from the analysis of issues (existing deficiencies, problems and threats in the specific areas), regarding the elimination and counteracting identified threats in all aspects - a good, protection system, surroundings and environment.

Proposals and recommendations resulting from the monitoring of a good should be formulated.

## PART III

### CHARACTERISTICS OF USE OF A SITE

The third part of the management plan concerns the contemporary use and functioning of the site. This part consists of 3 chapters. In a simplified way, they contain an analysis of elements and non-conservation factors that have a significant impact on a historical object. Therefore, they should be recognized, analyzed and included in the management of the given facility. Individual chapters are dedicated to stakeholders, sharing and contemporary use of the site.



## 6. Characteristics of stakeholders of a site

Chapter 6, which opens third part of the Management Plan, aims to collect and analyze information on the main groups of stakeholders who have connections or may have an impact on the protected historical facility. Stakeholders are all individuals and institutions that have connections with site (current or potential). The identification of stakeholders is very important because it helps to identify partners who can participate directly or indirectly in the protection and management of a historical facility. The analysis of groups of stakeholders who are already involved in the process of protection and management of a historic building is aimed at establishing their potential of actions and limitations. In turn, the identification of potential stakeholder groups is aimed at finding new partners who can become involved in the process of protection and development of a historical facility. In Chapter 6, two problems should be analyzed: identifying groups of stakeholders and identifying the areas of their activities to protect and use a historical facility.

### 6.1 Characteristics of the main groups of stakeholders /related and affecting the protection and use of a site/

A very important element in the analysis of the use of a historical object is the recognition of the main groups of stakeholders. First of all, the institutional stakeholders who are already involved in the protection and development of a historic facility should be identified. Most often, the main stakeholders involved in the protection and management of a historical facility are:

- the owner of the object
- the user of the object
- conservation/supervision services for the object protection/
- local government/to which the object is subjected/

Individual stakeholders, depending on the specificity of particular national administrative, legal, organizational systems, etc., and depending on the specificity of each individual historical site, they may have different characteristics, powers and possibilities of operation. The roles and functions of stakeholders can overlap. For example, the owner of an object can be its user at the same time, and the local government can simultaneously be the owner and user of a historic building (combination of three functions). In many cases, there may be many object users, and their characteristics may be very different. However, this does not change the fact that the juxtaposition of these four relations/functions should be the starting point for determining the main groups of stakeholders. The activities of each of these stakeholders are regulated to some extent by law, and therefore they can be treated as institutional stakeholders (even if in some cases they are individual persons).

However, in most of the historical objects there is more institutional stakeholders, who are involved in their protection and use. For example, organizations/associations interested in the historical values of these facilities and actively participating in their protection may play a significant role. They may have a formal status (then they are an institutional stakeholder), although they may also be formally unorganized groups of citizens. An institutional stakeholders may be tour-operators who organize tourist traffic in a given facility. Yet another institutional



stakeholder may be nature protection or landscape protection services, as historical ruins are often located in zones of protected nature.

An important institutional stakeholder may also be technical services, which are authorized to inspect the technical condition of historical objects. Each historical building must meet the appropriate safety standards, both as a building and as an object performing utility functions.

Institutional stakeholders are relatively easy to identify and then determine their requirements, capabilities, and expectations related to the protection and use of historical objects. Their formalized nature also facilitates contact with them and establishing cooperation (organizations and institutions have in principle a hierarchy, competences and powers).

However, it is more difficult to identify and cooperate with non-institutional stakeholders. Such stakeholders may be, above all, various types of communities living and operating in the vicinity of a historical facility. For example, residents who live near the facility - possible investments may disturb them, the development of tourism can be very troublesome for them. In such a situation, they become a committed stakeholder. Stakeholders are also local entrepreneurs who can benefit (or lose) on the protection and use of a historic object. The stakeholder is also the so-called "public opinion" in whose name various media can appear. Formation by the media of opinions on the protection and use of a historical object is extremely important, it may decide their fate. Individual tourists are also a very important stakeholders, who may have a decisive role in shaping the program of protection and use of a historic building. This group of stakeholders should be recognized due to the possibility of creating a functional program for a given facility.

The management plan should identify all groups of stakeholders in the most possible complete way, characterizing their possible participation and influence on the process of protection and management of the historical facility.

## **6.2 Definition of areas of cooperation with stakeholders**

The identification of stakeholder groups is a stage which necessary continuation is the recognition of their ability to act in the field of protection and management of a historical facility. In the case of some institutional stakeholders, this is a relatively simple task. The role of such stakeholders as conservation services, nature protection services, technical supervision or local government is determined by law. These provisions define the scope of rights of these stakeholders, and in some cases (e.g., technical conditions), even the detailed requirements which historical facilities are to meet - thus they define the field of cooperation with a given stakeholder.

However, in most cases, the area of possible cooperation needs to be determined. What is more, defining the scope of activity of individual stakeholders should not be limited to getting to know their current activities and plans. This is obviously necessary, but it may also be necessary to propose new plans to stakeholders. Proposals for new activities should be based on identifying the potential and possibilities of current stakeholders. Such actions should be taken first, but it should be accompanied by an indication of the extension of the possibilities of action.

In many cases, it may also be necessary to introduce new stakeholders. Such actions may be necessary, for example, when expanding the program of using a permanent ruin. The use of such an object requires specific utility functions, which should be adapted to the needs of protection of this type of facility. It is therefore likely that it will be necessary to find new users/stakeholders who will be able to implement these functions.



---

In general, however, the composition of stakeholder groups is a constant factor - the majority of stakeholders are local and permanently linked to a given historical facility. Therefore, in the first place, the program of protection and management of a historic facility should be based on their potential. That is why it is so important to thoroughly recognize this potential and their limitations (objective and subjective).

### **Conclusions and recommendations**

Conclusions and recommendations should include indications regarding a set of stakeholders (possible extension of this set), use of their potential, and removal of detected limitations.