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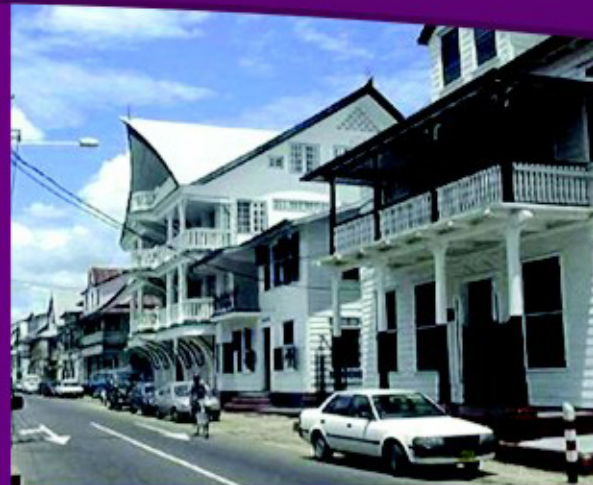


World Heritage Convention

# CCBP

## Caribbean Capacity Building Programme

For World Heritage



Management of  
historic centres.

MODULE

# 5



# Module



# 5

## Management of Historic Cities

Drafted by: Cristina Iamandi



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### **World Heritage Centre**

Francesco Bandarin, Director

#### **Special Projects Unit**

Ron van Oers

Sachiko Haragushi

### **UNESCO Regional Bureau for Culture in Latin America and the Caribbean**

Herman van Hooff, Director

Grazia Piras

Victor Marin

Sandra Varela

#### **Cosultants**

Grazia Piras (Módulo 1)

Ricardo Núñez (Módulo 2)

Herbert S. Stovel (Módulo 3)

Isabel Rigol (Módulo 4)

Cristina Lamandi (Módulo 5)

#### **Designing and Editing**

Juan Ricardo Martínez Bazil

Ivón Peñalver

#### **Translators**

Christian Parrilla

Jacques Bonaldi

Mike Phillips

Marina Lamadrid

Julián Rodríguez

### **UNESCO La Habana**

Calle Calzada 551 esquina a calle D, Vedado,

La Habana 10400

Telfs.: (537) 833 3438,

(537) 832 2840, (537) 832 7638,

(537) 832 1787,

Fax: (537) 833 3144

E-mail: [ccbp@unesco.org.cu](mailto:ccbp@unesco.org.cu)

[www.unesco.org/cu/ccbp](http://www.unesco.org/cu/ccbp)

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## Cultural heritage management programme for the caribbea

The Caribbean Capacity Building Programme (CCBP) is a long-term training programme focusing on cultural heritage management and aiming to create a Caribbean **network** of heritage experts. They, in turn, can share knowledge, know-how and expertise on the *modus operandi* of the World Heritage Convention and on heritage management in general.

The CCBP was conceived to respond to the needs identified in the Latin America and the Caribbean Periodic Report (<http://whc.unesco.org/en/series/18>), which showed that most of the Caribbean States Parties still lack the capacity and expertise needed to enable full protection and management of the present World Heritage sites and to identify new World Heritage sites.

The CCBP was endorsed by the World Heritage Committee in 2004 as part of the Caribbean Action Plan for World Heritage.

The CCBP is composed of a core and mandatory training module on the *Application of the World Heritage Convention* and a **series of other modules focusing on the various aspects of management** (tourism, historic centres, risks and cultural landscapes). Each module lasts 30 hours and encompasses practical exercises, analysis of regional case studies and discussions.

**UNESCO** is pleased to present this first edition of the **Module 5: Management of historic centres**, which have been developed with the contribution of Consultant Cristina lamandi.

Many of the Caribbean World Heritage Sites are historic centres. Historic centres are dynamic entities exposed to constant changes responding to socio-economic evolutions; thus there is a great need to provide guidance in dealing with and foreseeing these changes. Through the analysis of case studies, participants will learn how to find a balance between urban rehabilitation, restoration, reconstruction and maintenance of authenticity and integrity; how to face processes such as gentrification and loss of identity, how to evaluate development projects and how to generate financial resources. This module provides participants with the most up to date methodology on integrated management plans in urban contexts.

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# Introduction

The colonial powers that exploited the Americas mingled with the existing inhabitants and the imported African slaves, and gave rise to a multiethnic cultural heritage. The Spanish, Portuguese, Dutch, English and French colonizers and slave traders established strongholds along coastal areas and islands from which they waged war against each others. Some of these early establishments have been well conserved and give evidence today of a multi-layered historic and cultural past. The architecture and urban planning of these settlements bears witness to the harmonious interaction of European styles and planning traditions adapted to the local climatic circumstances and Caribbean exuberance.

Social and economic changes are rapidly causing many of Caribbean historic cities to decay or to be replaced with modern cities. There is a lack of public awareness of their value, while widespread urban planning activities give little attention to integrating old and new structures into a functional whole and to involving a broader stakeholders group into the planning process, which better reflect community values and priorities.

Conservation and development are not mutually exclusive; they should, and can, be part of a single planning process. Conservation projects need provision for development just as sustainable development requires an adequate approach to determining conservation policy. Developments do not take place in a vacuum but at an existing place, in existing surroundings. This obvious fact has to be understood and accepted before decisions on conservation and development can be made.

The balance is important: what is preserved gives the inhabitants a sense of continuity, of identity and stability. What is newly-created may ensure survival, revitalize or perform a function which could not otherwise be met.

The following training module proposal is meant to enable the participants to understand the complexity of managing a historic city, and to provide the main methodological steps for developing management plans for this type heritage resource. This module deals with the process of understanding the historic city (gathering, analysing and assessing information that bears upon policy decisions) and with the processes of making decisions and implementing them. It offers a common ground for debate, a method and a common language to help achieve a balance between "the old" and "the new" in a sustainable way. The result of these processes is a management plan.

Unlike most training programs of this kind, designed with European cultural heritage in mind and delivered worldwide, this proposal offers both an overview of an updated 'international' approach to this topic, and how this general scheme could be 'customized' as to suit Caribbean cultural identity and preservation traditions. Moreover, most case studies and photos would concern heritage places from the Caribbean region.

The module is designed to meet the needs of individuals, such as in-service planners, future historic city or district commissioners, future site managers operating in preservation offices, or those in career transition, who wish to improve their knowledge and competence in the field of management of historic cities. The primary purposes of this module are to introduce trainees to management of historic cities, and to provide some basic competence in the subject matter. Stress is given to the settlement forms and structures which characterize Caribbean culture.



## Objectives

The aim of the training module proposed below is to provide the participants with the necessary basic knowledge about management of historic cities and proper methodology to develop and implement management plans for historic cities.

1. To provide students from diverse backgrounds with a basic knowledge of the management of historic cities and specifically of management planning including concepts, perspectives and methodologies associated with architectural and urban heritage description, interpretation and analysis.
2. To improve the effectiveness of the conservation movement in the Caribbean by updating qualified professionals in conservation management planning, interpretation and administration, and to foster the effectiveness of this movement by increasing community awareness of the aims and techniques of urban conservation management.
3. To inform participants about the international charters and recommendations, and the main issues of the current debate in the management of historic cities
4. To promote the most updated principles and practices of urban conservation management planning
5. To provide students with a proper understanding of Caribbean urban heritage and build awareness among preservation professionals about its cultural significance, with respect to other cultural traditions
6. To prepare participants for the real project in professional practice by simulating typical activities, and research questions that may be presented to a site manager
7. To achieve ability to analyse, assess and develop policies and strategies
8. To achieve ability to best present the management plan and related projects to decision-makers, donors, owners, and other stakeholders.

## Description

The proposed training module consists of:

1. Identifying and interpreting evidence of the cultural forces - early settlement patterns, transportation, planning, etc. - that shaped the historic city.
2. Methods for researching a historic city using archival and physical evidence, reading and comparing old plans, surveys and inventories, deciphering and documenting the city through professional reports, maps, photography, etc.
3. An integrated examination of the historic cities including the assessment of its significance - establishing why the historic city is important and to whom -, state of conservation, causes of decay, pressures, risks and threats, assessment of the current management context, together with the methods and tools for conducting such assessments.
4. Regulatory issues for the management of the built environment. Basic legal techniques for protection of historic structures (designated conservation areas and buffer zones, protective legislation, urban regulations for the historic city, master plans, regional plans, etc.).

## Module structure

### Lectures

The lectures' content is conceived in 6 parts:

1. Following the formal course opening, the first part introduces the training module: training aims and objective, description, structure, goals and assignments (1 introductory session)
2. The second part introduces the training theme: the management of historic cities. It first provides an explanation of the key-terms and basic concepts used in conservation management of historic cities, the need and the purpose of management, key principles of management, management strategies, urban conservation and sustainable development and the requirement of an integrated and holistic approach, relevant guiding documents (1 session)

3. The third part focuses on developing a management strategy and a Management Plan: Introduction (approach, aims, methodology, actors); Site description; Assessment of site's significance; Assessment of the physical condition; Pressures and change forces; Conservation management policy, objectives and strategies (5 sessions)
4. The fourth part discusses the implementation, monitoring and review of management plans (1 sessions)
5. The fourth part concerns the editing and presentation of a Management Plan Report, illustrated by examples of Management Plan Reports for Historic Cities (1 session)
6. The conclusion summarizes the main challenges of managing of historic cities and the outcomes of the field work and exercises, and recalls the issues of conservation ethics (1session).

#### **Field visit and Exercises (field and class)**

- The preparation for developing management strategies can only be achieved by simulating the field, research and design activities involved in a real project. Therefore, a series of practical exercises, including field and class work, will take place in parallel with theoretical courses.
- Field work enables participants to immediately apply the skills they are learning.
- The exercises supplement class lectures with actual cases, and introduce participant to research and survey methods.
- The outcomes of the exercises, corresponding to the main steps involved in each management planning process, will be discussed in the seminars as described below.

#### **Seminars**

- Each exercise will be finalized by a seminar. Under trainer's guiding and based on recommended readings and skills acquired from the class lectures, the participants will present their work and discuss collectively the theme of the exercise.
- The seminar offers an opportunity for intimate exchange between the students and the teaching staff.

#### **Goals and assignments**

1. The program emphasizes professional applications of management planning methods for historic cities through a series of lectures and field activities. The goal is to provide an introduction to management of historic cities and prepare trainees for the "real world" of professional practice by simulating typical activities, and research questions that may be presented to a site manager.
2. The curriculum is tailor-made to fit the concrete requirements of the historic cities of the Caribbean and to fulfil specific training needs of Caribbean preservation professionals. The applications will concern Caribbean historic cities or historic city centres in need of management plans, selected in collaboration with local preservation authority. The approach of history of architecture and planning, field methods, and the legal and administrative aspects of conservation are based on both international and Caribbean experience.
3. The program would enable the participants to instruct technicians involved in the care and management of historic cities. They could therefore perform the role of both specialist and educator when they reintegrate their offices. This allows an immediate improvement in the quality of conservation and development projects, pending the establishment of a program for technicians.
4. Each group of students is to complete a series of assignments (4 exercises)
5. Exercises would be carried out in teams of 5 or 6 participants each
6. The results of team and individual work will be presented and discussed during the seminars organized at the end of each exercise.
7. Class lectures, field work and seminar discussions are all important parts of this module. Attendance is mandatory.

# Table of contents

Day 1	Day 2	Day 3	Day 4	Day 5
Course Opening				
Introduction to module 5 <b>L1:</b> Introduction to the Management of Historic Cities	<b>L6:</b> : Assessing Physical Condition. The SWOT Analysis <b>L7:</b> Assessing Management Context	Site visit to a historic city: learning how to organize and conduct field work; observations and field notes on site’s values, physical condition, management context  <b>E 1</b> (in situ ): Preparation of a survey sheet to be used for the inventory of the historic city	<b>E2</b> (in class): Assessment of values. Statement of significance	<b>E4</b> (in class): Linking Analysis to Decision-making: establishing policies, objectives and strategies  <b>S4:</b> Presentation and discussion of Exercise 4
<b>Break</b>	<b>Break</b>		<b>S2:</b> Presentations and discussions of Exercise 2	
<b>L2:</b> Developing a Management Plan: the Management Planning Methodology <b>L3:</b> Identifying the Planning Team and a Stakeholders Group	<b>L8:</b> Decision-Making: management policies, objectives and strategies for conservation, development and maintenance of historic cities		<b>E3</b> (in situ ): Identifying the Main Urban Management Issues; Conducting a Management Context Survey	
<b>Lunch Break</b>	<b>Lunch Break</b>	<b>Lunch Break</b>	<b>Lunch Break</b>	<b>Lunch Break</b>
<b>C4:</b> Documenting and Describing the Historic City	<b>L9:</b> Implementation, Monitoring and Review	<b>E1</b> (continued in class)	<b>E3</b> (continued in class)	<b>C11:</b> Best practices in management of historic cities: case studies
<b>L5:</b> Assessing Significance	<b>L10:</b> Editing a Management Plan Report	<b>S1:</b> Presentation and discussion of Exercise 1	<b>S3:</b> Presentation and discussion of Exercise 3	Conclusions and Closing

## Introduction to Module 5

**Theme:** This session introduces module 5, in the framework of the CCBP: objectives, description, structure and content. The participants are informed about the planning and logistic aspects and the resources available

### Course Opening

Formal opening by representatives of the municipality, local conservation authority, and a representative of the UNESCO office in charge of the coordination of CCBP.

SUBJECTS	LEARNING OBJECTIVES
1. Module aim and objectives	<ul style="list-style-type: none"> <li>• Participants acknowledge the module's aim and objectives and relate these to their own expectations and needs.</li> </ul>
2. Module content, structure, and methodology	<ul style="list-style-type: none"> <li>• Participants learn about the module's structure, content and the method to achieve the module's objectives.</li> </ul>
3. Resources	<ul style="list-style-type: none"> <li>• Participants become aware of human, written and web based resources proposed for the module, and how best to use and gain access to them.</li> </ul>

At the beginning of the module, the participants are handed out the detailed programme of the module and the documentation package for the site visit and the exercises.

### Module aim and objectives

- To establish a common ground participants are invited to introduce themselves and provide their educational and professional background, present responsibilities, interests and expectations from the module.
- The course instructor records the participants' expectations and integrates them into the module objectives, as much as possible, in order to satisfy participants requirements whenever possible.
- The aim of the training module is to provide the participants with the necessary basic knowledge about management of historic cities and proper methodology to develop and implement management plans for historic cities.

The main learning objectives for the course are the following:

- To provide participants from diverse backgrounds with a basic knowledge on management of historic cities including concepts, perspectives and planning methodologies associated with architectural and urban heritage description, interpretation and analysis.
- To improve the effectiveness of the conservation movement in the Caribbean by updating qualified professionals in conservation management planning, interpretation and administration.
- To inform participants about the international charters and recommendations, and the main issues of the current debate in management of historic cities

- To promote the use of the most updated principles and practices of urban conservation management planning
- To provide participants with a proper understanding of Caribbean urban heritage and build awareness among preservation professionals about its cultural significance, with respect to other cultural traditions
- To prepare participants for the real life situations by simulating typical situations and research questions that a site manager may have to cope with
- To achieve the ability to analyse, assess and develop policies and strategies
- To achieve the ability to best present the management plan and related projects to decision-makers, donors, and other stakeholders.

Additional course objectives may include:

- Testing and improving course materials and objectives for later use in other contexts.
- Building a regional network of those interested in management of historic cities.

### Module content, structure and methodology

- The instructor shall present both the content and structure of the module by writing the main points on a flip chart and then linking them to the detailed module programme.
- The instructor shall discuss with participants the planned approach to the module and introduce the different pedagogical methods to be used: lectures, interactive discussions, field visits, exercise(s), seminars, etc. It should be clarified that lectures consist of transmitting knowledge and promoting awareness, and that exercise(s) will be used to make participants apply what they have learned during the lectures. The instructor should stress the importance of an interactive approach and the importance of participant's contributions.
- For the exercises, the case study (exact area) will be defined.

### Resources

The instructor should review the resources available for the module. These would include the following:

- Human resources. The course instructor shall introduce himself/herself, providing some relevant detail about his/her professional background. While normally one instructor would run such a module, it is always beneficial to involve local experts as resource persons, especially to support exercise(s) and seminars. If other instructors are used, they should be introduced and their backgrounds described. The instructor should also suggest that the participants are also to be considered as human resources for the course.
- Reference documents. A reference package should be put together in either paper (hard copy) form or digital form for each participant. This should be designed to serve as a reference document during the module but also be substantial enough to assist the participants later in their activity. It should include key readings, to which reference is made during the course, and a selection of relevant international guiding documents, such as charters, recommendations, declarations. It should also include a comprehensive bibliography of written and web based sources.

## LECTURE 1: Introduction to the management of historic cities

**Themes:** The definition and explanation of ‘urban heritage’; The evolution, definition, key principles and purpose of management; UNESCO’s role and the relevant guiding documents.

SUBJECTS	LEARNING OBJECTIVES
1.Urban heritage	<ul style="list-style-type: none"> <li>•Participants learn what is urban heritage and become aware of the evolution of its concept.</li> </ul>
2.Evolution of the concept of the historic city and some key themes	<ul style="list-style-type: none"> <li>•Participants get an inside into the reasons for the occurrence and persistence of historic cities problems, the changes that have occurred in the conservation practice of historic cities, the lessons learnt and best practices case study.</li> </ul>
3.Definition of management and key management principles	<ul style="list-style-type: none"> <li>•Participants learn core management principles.</li> </ul>
4.Purposes of current management	<ul style="list-style-type: none"> <li>•Participants learn why management is necessary for historic cities and how it functions.</li> </ul>
5.UNESCO's role and relevant guiding documents	<ul style="list-style-type: none"> <li>•Participants become aware of the guiding role played by UNESCO in the management of historic cities in general and of World Heritage Cities in particular.</li> <li>•Participants learn about the main guiding documents: UNESCO Conventions, charters, recommendations, etc.</li> </ul>

### OUTLINE OF SUBJECTS TO BE COVERED

#### 1.Urban heritage

The lecture is introduced by an historic overview of the evolution of the concept of ‘urban heritage’ and the gradual paradigm shift from the conservation of monuments, their surroundings, urban ensembles, to the conservation of sites, conservation of city centres, historic cities and cultural landscapes.

The lecture also provides a brief history of the origins of historic cities problems and responses; defines urban management and identifies key principles to guide its

practical aspects; identifies purposes and main issues of current management; and finally, outlines the role of UNESCO conventions and the other key documents.

#### 2.Evolution of the concept of the historic city and some key themes

The instructor explains different policies related to different time periods (e.g. 1950s reconstruction; 1960s revitalisation; 1970s renewal; 1980s redevelopment and integrated urban conservation, 1990s conservation-based regeneration) and

emphasizes their differences in strategy and orientation, key actors and stakeholders, spatial level of activity, economic focus, social content, physical emphasis and environmental approach.

The above themes provide the basis for the definition of management as a comprehensive and integrated vision and action which is based on the significance – or values – of a site and how this significance will be retained in any future use, changes or development. It also seeks to ensure a lasting improvement in the economic, physical, social and environmental condition of a historic city.

### 3. Definition of management and key management principles

The key management principles are to:

- Assess, protect and guarantee the site's significance. Interpretation, presentation and education promote the long life of the site's values.
- Assess the site's condition.
- Define what we want to achieve by managing the site.
- Operate according to the principles of sustainable development. The physical features of the historic city are a non-renewable resource. For its use to be sustainable, it must be managed so that it meets contemporary needs in ways which do not compromise its values and significance.
- Ensure consensus through the fullest possible participation and co-operation of all the stakeholders with a legitimate interest in the management of a historic city. Any significant change require previous consultation with local stakeholders and with the appropriate local or national authorities; this may be achieved through partnership or other effective ways of cooperation/collaboration.
- Set up a good monitoring system.
- Revise initial programmes of implementation.

### 4. Purposes of current management

The purpose of management is to provide a framework to preserve the cultural heritage assets of the historic city. This includes protection and enhancement of the architectural, archaeological, landscape and natural assets and their urban and landscape settings, improving understanding of the site, its interpretation and use as an educational resource, and supporting the local community in its cultural, social and economic vitality.

### 5. UNESCO's role and relevant guiding documents

International guidance and specialized agencies involved in the management of historic cities and settlements are further explained. An overview of the main guiding documents – such as UNESCO conventions, global strategy, operational guidelines; the relevant charters and recommendations and the Nara document on authenticity – will end this lecture.

Documents to which reference is made in this lecture are to be found in the compilation prepared for this course and included in the package handed out to participants.

## LECTURE 2: Developing a management strategy: the planning

**Theme:** This lecture addresses the value-led, integrated and holistic approach to management planning of historic cities, the characteristics of the process and its outcome (the Management Plan) and the methodology to prepare it.

SUBJECTS	LEARNING OBJECTIVES
1.The conservation planning process	<ul style="list-style-type: none"> <li>•Participants understand the need for and the benefits of engaging in a conservation planning process.</li> <li>•Participants understand which are the main elements of the conservation planning process.</li> </ul>
2.The Management Plan: definition, principles, objectives	<ul style="list-style-type: none"> <li>•Participants understand what is a Management Plan, its principles and objectives.</li> </ul>
3.Management planning methodology	<ul style="list-style-type: none"> <li>•Participants become aware of the steps to be followed to develop a Management Plan.</li> </ul>

### OUTLINE OF SUBJECTS TO BE COVERED

#### 1.The conservation planning process

Too frequently, importance is attached to the outcome – the “plan” – while the process for achieving it is undervalued or overlooked. The benefits of the planning process go beyond of the outcome; it is the opportunity to:

- Create a shared vision among staff responsible for the site and external parties who have an interest in the site;
- Involve key players and strengthen relationships, negotiate conflicts and form alliances that will benefit the site;
- Engage in transparent decision making: it makes the decision-making process open and clear to all;
- Reassess, evaluate and synthesise information about a site;
- Take into account the needs of future generations and your own.

A planning process is a powerful tool for:

- Thinking and making decisions in a logical way
- Setting priorities by understanding what is really important about a site

- Explaining and justifying decisions
  - Ensuring that the results of decisions are sustainable.
- The planning process will serve as a road map for making good decisions and managing problems.
- Comprehensive planning for cultural resource management (conservation management or site management) consists of integrated, interdisciplinary approaches to the preservation of the built environment developed to address the changing conditions of contemporary society.
- Integrated planning methodologies have been developed by ICOMOS Australia, the US National Park Service, Parks Canada, English Heritage, and many NGOs. These plans are constructed according to an holistic approach where conservation policies are integrated and take into account a series of issues (e.g. availability of resources, environmental legislation, technical state of conservation) at different level and for different purposes.



## 2. The Management Plan: definition, principles, objectives

Conservation management planning represents a collective vision for the site and engender support for continued investment by engaging the stakeholders in the planning process. Management plans should be value-driven and developed through a participatory and interdisciplinary process. This process places values and the participation of a wide spectrum of interested parties at the core of the decision-making process. This process is adaptable and flexible.

The management planning process is a critical process consisting of surveying, defining and assessing, analysing to enable to formulate programmes for conservation and management of change, including monitoring and cyclic maintenance. The plan should be a continuous process that brings together citizens and interest groups and helps them identify where their diverse goals complement historic preservation and how they can work together to preserve their local heritage.

The planning process is structured in a logical progression from the collection of information through assessment and analysis of all factors that influence management of the site, to decision making.

While the integrity of the process rests on following sequence, it is also important to recognise that this is an iterative process; it is not strictly linear and frequently necessitates looping back to previous steps to check, clarify and modify the assessment.

The result of this process is a plan that makes clear a strategic vision, while it documents and publicise the essence of the process's major phases.

The Management Plan is a document that sets out the significance – or values – of a site and how this significance will be retained in any future use, alteration or development. It is a statement of the community's goals for its historic properties and the actions it will take to reach those goals.

The Plan is most effective when it is integrated to the community's development plan and is coordinated with other policies for housing, economic development, transportation, etc.

## 3. Management planning methodology

The Management Plan follows the principles of qualitative planning. Its main objectives are:

- To preserve the site's significance / values.
- To allow the harmonious evolution of the historic city with regard to contemporary requirements.
- Conservation planning and urban planning are parallel and complementary planning processes: conservation should be integrated to one single management project that manages the activities and needs on the whole territory of the city or region.
- Conservation planning is based upon a conservative approach to change: the focus is on the transformation, augmentation and conservation of what already exists.
- Knowing, Sharing, Planning and Implementing are a chain of actions which synthesize the management planning method. None of the above elements could be dissociated, or considered minor with respect to one another.
- The Conservation Management Plan transcribes the elements gathered in the analysis stage, and makes proposals susceptible to satisfy inhabitants' needs. The instructor will further explain the main steps of the process:
  - Stating the Aims
  - Identifying a Planning Team and Stakeholders
  - Understanding the site:
    - Documenting and Describing the Site
    - Assessing Cultural Significance / Values
    - Assessing Physical Condition
    - Assessing Management Context
  - Decision-making:
    - Establishing Purpose and Policies
    - Setting Objectives
    - Developing Strategies
    - Programme for Action
  - Implementation
  - Responsibilities & Administration
  - Funding & Resources
  - Reviewing & Monitoring the Management Plan

## LECTURE 3: Identifying a planning team and a stakeholders group

**Theme:** To identify the right individuals and organisations to participate in the management planning is critical to guarantee a successful decision making process

SUBJECTS	LEARNING OBJECTIVES
1. Identifying the Planning Team	<ul style="list-style-type: none"> <li>• Participants learn how to select the members of a planning team.</li> </ul>
2. Identifying the Stakeholders Group	<ul style="list-style-type: none"> <li>• Participants learn the principles and criteria for involving key people in urban heritage.</li> <li>• Participants realize the role and the importance of a wide stakeholders group.</li> </ul>

### OUTLINE OF SUBJECTS TO BE COVERED

#### 1. Identifying the Planning Team

- The planning process is in essence about bringing the right people and organisations together; therefore, identifying the individuals and organisations to participate in the process is crucial. The managing authority which will lead and guide the planning process, takes on this responsibility.
- The selection of a core planning team to oversee and guide the process is the first step in **identifying the right people and ensuring continuity throughout the process. Although outside expertise may be required, it is essential to involve in-house professionals since ultimately, they will have a great deal of responsibility to implement the decisions.**

#### 2. Identifying the Stakeholders Group

The second critical group to identify is the stakeholders' group, consisting of:

- those who have a special interest or stake in how the site is used, developed, interpreted (perceived), or preserved;
- those who have the potential to impact the site (for better or worse); and
- those who are themselves impacted by what happens at the site

Stakeholders may include the following:

- Government agencies, such as cultural and environmental agencies, tourist agencies, religious authorities, or nongovernmental organisations (NGOs) with an interest in the site;
- Planners and architects;
- Archaeologists, historians, architectural historians, geographers, and other researchers who have done significant work at the site;
- Groups with an affinity or ancestral relationship to a site;
- Local community members who benefit economically or who want to use the site for commercial purposes;
- Local community members who may be adversely affected by the site as a result of land disputes or influx of tourists and traffic or other types of pressures;
- Private tourist agencies representing the interests of tourists and local or regional business interests, which may have requirements or impact the site;
- Specialised tourists, or groups who come in large numbers and may have special requirements or may impact the site.

**Stakeholders can offer resources, knowledge, different perspectives, and a concern for different values that we need to recognize in order to**

make decisions about the site. If the stakeholders are engaged in the process, they can become very powerful forces for good.

All the main groups and organisations need to be involved so that planning processes will reflect community values and priorities and so that decisions and actions are linked and owned by the stakeholders.

The decision-making group must report back frequently to the wider interest groups to keep them informed.

**Principles for involving key people in historic city management.**

- People have the right to be involved in decisions affecting their cultural heritage, and in the ongoing management of places, which embody their

heritage. This involvement in management should be continuous and at the appropriate level.

- Identifying which organisations, authorities, and individuals, have rights to speak for the place, and/or have interests in the place, must be done by **wide and inclusive consultation**, at the beginning of and throughout the process. All specialist community groups, organisations and individual owners or custodians with a possible interest in the place should be involved. This involvement should be supported by competent technical planning and effective negotiation and mediation processes.
- Decisions which have an effect at the local level should have full local level involvement. Regional planning should accommodate local level input. Local level planning should be integrated with regional planning.

## Lecture 4: Documentation and description of the site

**Theme:** This lecture discusses the first step in the process of understanding the site, which consists of defining its components, collecting and analysing information and documentation

SUBJECTS	LEARNING OBJECTIVES
1.Documenting the historic city	•Participants learn about the methods used for documenting a historic city.
2.Describing the historic city	•Participants learn which are the main elements to be considered when describing an historic city.

### OUTLINE OF SUBJECTS TO BE COVERED

- Documenting and describing the site establishes what is known about the site and what needs to be understood.
- This phase involves identifying and inventorying important documents and archives. All pertinent literature relating to the site should be collected, catalogued and made accessible.
- This phase also involves defining or refining the boundaries of the site and its buffer zones (both

- legal and cultural), if so needed for the purpose of the management plan.
- This stage in the process offers an opportunity to identify gaps in knowledge that will influence decisions about the site; this is a time to assimilate and synthesize what is known and identify what is not known.
- The instructor should point out that the mistake that can be made with this activity is to see it simply as

compiling information for its own sake. The activity needs to be strategic: the results will inform the assessments and contribute to establishing policies for the site.

## 2. Describing the historic city

The description of a historic city consists of city characteristics and associated features. "Historic city characteristics", "historic city components", "historic city features", or "character-defining features" are among the most commonly used terms in the literature for this kind of classification systems. A review of the classification systems and their associated terminology show many commonalities. Most of classification systems list the following characteristics:

- Topography
- Spatial organization
- Land use
- Cultural traditions (land use practices, methods of construction, patterns of land division)
- Circulation (paths, roads, highways)
- Building and structures
- Views and vistas
- Small-scale features (fences, benches, monuments, signs, road markers)
- Archaeological sites (surface or subsurface features such as road traces, fortification traces, irrigation system ruins)

The above list of characteristics is just indicative; it rather provides a basis from which the relevant characteristics can be identified.

If the boundaries of a historic city need to be defined, the issues to consider in establishing working boundaries are:

- the topography of the area
- the values of the site
- connections with other parts of the city or the natural setting
- local community interests

- sensitivity of any specific parts of the area
- buffer zones
- who has interests in what
- local and regional planning and administration

Boundaries may change depending on the outcomes of consultation, archival study and field survey.

Site history provides a historical description of the site through every historic period up to the present, and it identifies and describes the historic context and period(s) of significance associated with the historic city. Site History refers to the stories of individuals or groups associated with the physical development of the historic city, and not only memorable figures but also those traditionally forgotten, overlooked or under-represented. Site history should also take into account design intent, previous design principles, patterns, features, and individuals or events that have shaped the historic city (transportation networks, legal aspects, ownership, etc.).

Work is based on research and historical documentation, with support material to illustrate the physical character, attributes, features, and materials that contribute to the significance of the historic city.

Research involves the study, analysis, evaluation and use of primary and secondary, written and visual source materials, including:

- manuscripts, historic city plans, design plans, maps, surveys and drawings, paintings, period illustrations, postcards, historic and recent photographs, period literature, journals, oral histories, historic, etc. Site history may include projects or design intents which were never implemented.
- recent studies and scholarship, reports, inventories.

- The way of conducting documentation is determined by management objectives, the complexity of the historic city and the availability of relevant documents.
- Research depth is commensurate with the complexity of the historic city in terms of physical character, multiple periods of developments and degree of change.

# Lecture 5: Assessment of significance

**Theme:** Establishing why the site is important and to whom, and how values get prioritised, negotiated, and balanced

SUBJECTS	LEARNING OBJECTIVES
1.Values and conservation planning	•Participants became aware of the role of values in conservation planning.
2.Evolution of the notion of ‘cultural significance’	•Participants learn about the emergence and evolution of the notion of ‘cultural significance’.
3.The valuing process	•Participants became aware of the role of stakeholders in the valuing process.
4.Statement of significance	•Participants learn about the statement of significance .
5.Authenticity and integrity of historic cities	•Participants learn how to ‘measure’ the authenticity/integrity of a site.
6.Significance and management	•Participants learn about the role of significance in management planning.

## OUTLINE OF SUBJECTS TO BE COVERED

### 1.Values and conservation planning

- Assessment of significance is the first and most important step of the assessment and analysis phase, which follows the documentation and description phase. Assessment and analysis is the core of the planning process. Decisions made about the site will flow directly from this phase.
- The assessment involves, next to collection of information, principally the evaluation and analysis of information, in which value is revealed and relationship analysed – cause-and-effect relationships and those between people and institutions.
- Values depend on society and can change over time.
- In the case of historic cities, as part of cultural heritage, particular attention should be paid to cultural significance, although the socio-economic aspects should not be ignored.

### 2.Evolution of the notion of ‘cultural significance’

The evolution of the notion of ‘cultural significance’ will be explained in reference to the following documents:

- Venice Charter (1964): cultural significance and “aesthetic and historic values”.
- Burra Charter (1982, Australia ICOMOS): conservation as a value-driven process centred on the notion of cultural significance ; approach to conservation planning based on this assumption.
- Nara Document on Authenticity (1994).
- Declaration of San Antonio (1996).

The multiplicity of values attributed to a historic city derives from the varied perspectives and judgments of persons, professional groups and communities. The assessment of significance serves to identify the

range of values that people have attributed to the site, which in turn drives the decisions about why and how to preserve and protect the site.

The stakeholders group provide a broad understanding of the varied meanings associated with the site. In this key step of the planning process, the stakeholders play a major role. Giving voice to their varied perspectives through a participatory process helps to ensure that conservation is responsive to professional and academic ideals as well as to social needs and concerns. Conservation professionals can play a very important role in facilitating participation and guiding the conservation process.

The instructor will focus on widening the net of values and broadening participation in conservation. The end goal is bringing a meaningful representation and balance among heritage values as held by outsiders as well as insiders to the process of decision making and planning.

### 3. The valuing process

The work of those in charge with prioritising, negotiating, and balancing values can be guided by the notion of sustainability:

- take into account the needs of future generations;
- wide participation in conservation planning processes;
- maintain diversity (cultural diversity and biodiversity);
- generate tangible and intangible benefits;
- use scarce resources wisely and strategically: this applies to financial, human, and environmental aspects;
- recognise that some actions are irreversible, therefore they have to be approached with extreme caution;
- recognise interdependence: heritage is part of a system connected to society and environment; conservation must, therefore, be approached holistically, considering the many values of heritage and seeking to integrate heritage into other social activities (development, education, etc.)

### 4. Statement of significance

- All the values need to be assessed, recognized, and put into a statement of significance, but potential conflicts need to be identified and acknowledged.
- The value of heritage places to local communities is one aspect of significance which has been poorly represented in conservation thinking in the past. There are many heritage sites which are valued by communities for reasons which are unknown to the wider society. These special sites often contribute to the community's sense of stability by reflecting the historic, scenic, recreational or social experiences common to that community.

- Integration of the community value into the Statement of Significance needs the involvement of the local community, by way of consultation, to discover what aspects of the heritage place are important to it, and in what ways it is significant to that community. Discovering these views will give the historic city significance another dimension, and will strengthen support for the conservation of that particular historic city.
- It has to be also pointed out that scholars and specialists tend to concentrate on artistic achievement, grandeur and major historic events. They often neglect the commonplace, the story of the everyday lives of people at such heritage places, and the element of continuity and connection with the present population which might in fact be of more interest and relevance to them.
- The multifaceted significance of important heritage places in communities which share several cultures or religions has also led to conflict and heated debate about conservation interpretation and ownership.
- The significance of heritage places to different groups has important consequences for the investigative and evaluative processes that determine the cultural significance of heritage places as a basis for conservation policy. The concerns and interests of traditional custodians and community are relevant to every heritage place as a basis for conservation policy and should feature in every Statement of Significance, and in the conservation management plan.
- The Statement of Significance is a summation of cultural significance. It is crucial to management decisions, but it does not take into account the management problems, condition of the place, needs of society, or other values.

### 5. Authenticity and integrity of historic cities

- Many aspects of significance can be lessened by the loss of authenticity / integrity or completeness of the historic city. To assess significance, the manager must look carefully at the authenticity / integrity of the heritage place, to see if it still demonstrates or represents adequately the claimed significance.
- Authenticity is a crucial aspect in the assessment of cultural heritage in general, and of historic cities in particular. Generally, authenticity is ascribed to a heritage resource that is materially original or genuine as it was constructed and as it has aged and weathered in time.
- Authenticity may be understood in different ways depending on the context of its historical significance.
- Authenticity can be jeopardised by the destruction of historical strata, or the modern replacement

of original elements and the addition of new elements. A heritage resource that passed the test of authenticity maintains its original integrity, as created or as it has evolved through time.

- According to the Operational Guidelines (2005, II.E, 82), several aspects of authenticity should be considered:
  - authenticity in form and design
  - authenticity in materials and substance
  - authenticity in use and function
  - authenticity in traditions, techniques and management systems (workmanship)
  - authenticity in location and setting
  - language, and other forms of intangible heritage
  - spirit and feeling.

In the Caribbean context particular attention should be given to spirit and feeling (“Attributes such as spirit and feeling do not lend themselves easily to practical applications of the conditions of authenticity, but are important indicators of character and sense of place, for example, in communities maintaining tradition and cultural continuity.”(Operational Guidelines).

To be nominated to the World Heritage List, the heritage resource must maintain its integrity with respect to these types of authenticity.

To know more on this topic, refer to the Declaration of Nara and the application of the ‘test of authenticity’, in the “Operational guidelines”.

**6. Significance and management**

- The next step in the process, is the preparation of a condition report, followed by a conservation policy or management policy, which takes the Statement of Significance and puts it together logically with other management constraints and requirements, to come up with a strategy or plan for the management of the heritage place.
- The essential element to remember is that the significance assessment and statement is an essential prerequisite for further plans. We cannot make decisions about the site until we have objectively and separately sorted out all the elements of the historic city’s value or significance.

**LECTURE 6: Assessment of physical condition**

**Theme:** This lecture discusses the condition of the site and the threats to the site

SUBJECTS	LEARNING OBJECTIVES
1. Condition assessment	• Participants learn what is a condition assessment and its purpose .
2. Conducting a condition survey	• Participants learn how to conduct a condition survey.
3. The SWOT analysis	• Participants become aware of the threats to and opportunities of the site .

**OUTLINE OF SUBJECTS TO BE COVERED**

**1. Condition assessment**

The condition of a heritage place can be examined by undertaking a condition survey and report. This is a process of observing and documenting problems, which results in a better understanding of what forces are physically affecting the historic city. The purpose

of a condition survey is to document and assess the physical state of a site. The end product of a condition survey is an archive of valuable graphic and written documentation representing baseline data about a site, which can be used to make recommendations for the future use and treatment and to monitor change over time.

## 2. Conducting a condition survey

A condition survey proceeds in 3 basic stages:

1. Collection of historical documentation relating to past condition, use, and previous interventions to structures or site.
  2. Objective recording of the physical condition – an objective record of what exists. It concerns primarily the effects, rather than causes. A comprehensive inventory is an essential tool for this stage. The instructor should underline that the inventory should include all buildings - not only the remarkable ones, but also the modest, vernacular, and new construction - and all open spaces (designed gardens and parks, landscape elements, vacant lots or land that became available from demolition).
  3. Diagnosis and prognosis. Diagnosis is concerned with examination and analysis of current condition to determine probable causes of deterioration. It requires an integrated approach through analysis of the whole site using the knowledge of specialized disciplines and may necessitate further research and long-term monitoring. Implicit in diagnosis is prognosis. By linking existent conditions with historical documentation and diagnosis, rates of deterioration may be estimated, and risks assessed, thus priorities of intervention are brought to the fore in decision making.
- Other type of information should be gathered and analyzed as regard to: urban form and landscape, townscape, relationship between streets, buildings and green spaces and their integration through scale, style and materials, statues and monuments, colour (existing and historic colour schemes), traffic, circulation, relation with the wider infrastructure on the city, public space and streetscape (storm water drainage and paving, signs, tree planting, lighting, footpaths, shopfronts, police boxes, telephone boxes, bus stops, signage), socio-economic data.
  - Findings from the analytical stage include a series of thematic maps and schemes.
  - Recording the present condition of the heritage place can provide a benchmark for monitoring changes to a heritage place brought about by natural agents or human interference.

## 3. The SWOT analysis

- Making a simple list of the Strengths and Weaknesses, Opportunities and Threats will assist us to get an overall view of the management context.
- Condition reporting is basically an assessment of the present physical condition of the main elements of the historic city and immediate surroundings.
- Both natural and human impacts need to be assessed.
- The instructor should stress that 'condition' refers to not only damage to the site, but also to the positive aspects of the historic city's condition.



# LECTURE 7: Assessment of the management context

**Main theme:** This lecture discusses the current constraints and opportunities that will affect the conservation and management of the site

SUBJECTS	LEARNING OBJECTIVES
1.Pressures and other forces for change	•Participants become aware of the pressures affecting the site and other forces for change.
2.Management issues	•Participants become aware of the management issues.

## OUTLINE OF SUBJECTS TO BE COVERED

### 1.Pressures and other forces for change

This step in the planning process concerns the assessment of the existing pressures affecting the site, its management context, user groups, stakeholder interests and legal controls, that affect the significance of the site, and other forces for change

The following constraints against change may apply:

- The incompatibility of the values and significance of the historic city with its intended new use;
- The limitation or the lack of skills available for research, planning, conservation, design, construction, interpretation and presentation, management, operation and maintenance;
- The time and cost requirements of education to achieve sustainable use through adequate management, operation and maintenance activities, of providing implementation skills, and of promoting awareness through the media, academic and technical institutions;

The following forces for change and opportunities for development may be at work:

- The demand for new uses and adaptations that may be required to satisfy that demand;
- Opportunities for beneficial use and change such as adaptive re-use and conservation-led regeneration;
- Opportunities for new and complementary uses that bring revenues and benefits to the community and to the operation and maintenance of the historic environment;
- Opportunities for education and tourism through improved interpretation and presentation for the public

### 2.Management issues

Examples of major issues, which may need to be considered when assessing the management context, include:

- Regional and local development context
- Legal and legislative context
- Ownership
- Land use patterns and development pressures
- Existing plans and proposals
- Restrictions resulting from significance of the heritage place
- Other cultural or social constraints
- Key stakeholders views, input and planning
- Local community involvement
- Management structures
- Physical condition of the heritage place and its environment
- Physical or environmental constraints
- Infrastructure condition and planning
- Human, material and financial resources
- Present and projected visitor use patterns
- Political attitudes and degree of support
- Financial base
- Power base
- Structure and organization
- Staff resources and expertise
- Monitoring and maintenance systems
- Visitor numbers, profile, and impact
- Research assessment

This assessment must be prepared by a multidisciplinary team.

Any plans for the future of a historic city will not work unless all key players are involved in the conceptualization of the plan and feel that they are participating in the ownership of the proposed outcomes.

## LECTURE 8: Management policy, objective, strategy for conservation, development and maintenance of historic cities

**Theme:** Determining goals, objectives and policies for management

SUBJECTS	LEARNING OBJECTIVES
Management policy and objectives	Participants learn how to determine goals and policies.
Management strategies	Participants learn how to formulate strategies Participants get aware about the main management tools.

### OUTLINE OF SUBJECTS TO BE COVERED

- **Goals** are general statements of long- term desired outcomes. **Policies** are rules for the ongoing management of the historic city.
- **Objectives** refer in this context to shorter term, more specific goals. Often we find that goals for historic cities, and for heritage sites in general, have a lot in common. For instance, all heritage sites will have as a goal the conservation of cultural heritage, and probably something about community use, education, and/or research. Objectives are used to state in more detail in what way and to what extent we will achieve these overarching goals.
- **Goals and objectives** derive from a careful study of the statement of significance, and the management conditions. A necessary primary aim will be the conservation of the site's cultural values; but the way we do this, and the extent to which we can do it, depends on the assessment of the management situation. Knowing these from our earlier analysis will allow us to write objectives which meet our goals by specifically addressing these issues.
- **The Conservation Policy**  
The governing principle of the Conservation Policy is the need to protect and enhance the significance of the historic city. Limits of potential change should be identified which will cause the least loss of value and significance, while also ensuring sustainability. This information should be brought together into a conservation policy including:
  - Policies for retaining value and significance of the historic environment (urban areas including buildings and their details, buried archaeology, landscape elements, etc.) under any future management, use or alteration, and in accordance with all relevant legislation, government guidance, local or structure plan policies;
  - The principles to be followed in repairing conserving, maintaining and reusing the site;
  - The conservation principles to be followed for land-use and urban planning both within and adjacent to the historic environment.
  - The conservation policy should be comprehensive and cover all significant aspects of the site. It should be understood by all the stakeholders and should be accepted and adopted by the relevant planning authorities.

Once the conservation policy has been agreed and the forces for change, the constraints, and the opportunities have been assessed, it will be possible to develop a variety of options for defining detailed policies for all aspects of the site's management. This will require an iterative process, since countering some of the threats may create new opportunities, while exploiting some of the opportunities may put the significance of the historic environment at risk.

Each policy option should:

  - Be effective in responding to the issues that have been identified;

- Be realistic and appropriate to the local social and political conditions, to the availability of skills, and to the financial and economic constraints;
- Ensure that resource requirements associated with its management and implementation are adequately considered.

The stakeholders should be involved in the development of the various options. Their understanding of the economic and social benefits will promote financial, social and political support for the strategy.

The process of examining options will lead to a series of specific preferences with their feasibility, but only one will become the preferred option upon which the management and business plans can be assessed. Subsequent detailed development of the preferred option, after the management strategy and business plans have been approved, will be required.

**Objectives** are often best written under the headings of the key issues we have identified in our previous courses on the present management situation and physical condition of the historic city.

**Strategies** set out what has to be done to achieve the objectives, by the adoption of specific actions or groups of actions. The decision-making group, together with the people who will be involved in the day-to-day management of the site, should decide upon strategies and actions to meet the goals and objectives.

Strategies outline personnel, resources, management structures and technical requirements, and may detail the timing and sequence of particular conservation or management actions. The strategies should be listed in their order of priority so that the most important things are done first, or as soon as possible.

Some of the most commonly needed strategies can be summarised as follows:

- Conservation and, if change is involved, the planning, design and construction requirements;
- Maintenance/ Monitoring/ Environmental assessment
- Institutional and management organisation; the key managers and their roles; the programmes for implementation of the policies, and for the subsequent works, equipment, staffing, operation and maintenance;
- Business planning
- Visitor management
- Site research needs
- Community education and involvement

Strategies must:

- Be consistent with the identified cultural significance of the site, the statement of policy and objectives
- Be worked out so that the most important things are done first
- Describe the decision-making process, policies and structures
- Take into account any impacts
- Support objectives and be in line with policies
- Describe what needs to be done to achieve the objectives

The phasing of the work plan for large urban areas requires an overall vision of how the historic city should change. This can be developed into long-term aims (usually 30 years), and medium-term objectives (usually 5 years) to develop prioritised work programmes, identify individual projects, take into account available resources, benefits and constraints, budgets, costs and business plans, and to balance expenditure with funding.

Costing for all strategies must be realistic and must be based upon the likely resources of skill, technology, and funding available. Sometimes funding may be central to the choice of the preferred strategy. Expenditure on essential maintenance may well be justified, even if the long-term future of a historic city is still uncertain. Some historic environments may be so culturally important that conservation is required by the authorities, even if in the short term no direct or indirect financial or economic benefit can be recognized. It may be necessary to give priority to works that will generate income to help finance the rest of the programme, or to provide basic infrastructure or to respond to external development priorities. New works requiring change should be undertaken only if the consequent revenue generation and annual expenditure on operation and maintenance can be met, and if the viability of any work to the historic environment is proved.

Where a strategy requires broad support, involving many of the stakeholders, its justification by means of adequate management and business plans may be essential for promoting support.

**Actions** are the actual steps we will take to change things. Actions are strategically programmed in a specific document: the **Action Plan**.

The Action Plan document is designed according to the guiding principles, which stem from the character of the site and the aim to enhance it, while the overall objective for the future development and improvement of the historic city summarize the vision for a long term sustainable improvement in the environment and economy, by promoting a balance

between different interests (residents, business and visitors). The guiding principles are transposed into Issues and Guidelines. Each issue is elaborated and detailed recommendations are given for each one. Issues are proper to each site and based on thorough assessment, diagnosis and analysis. Most commonly, issues concern:

- Environment and Urban Fabric (street pattern; paving; street furniture; archaeology; conservation of existing buildings; new development; public green space; specific planning controls and guidelines, etc.)
- Traffic and transport (Circulation Plan; parking; servicing; public transport; facilities for pedestrians, tourist coaches and cruise boats, cyclists, etc.)
- Shopping (retail studies; local shopping; specialty shopping, etc.)
- Housing (demographical studies; future housing development; tenure pattern)
- Employment and Training, Business and Institutions (offices; small business / workshops; institutions; community facilities)
- Tourism and Leisure (tourism strategy; increasing and stabilizing the number of visitors; deriving the maximum benefit from visitors for the local economy; support of cultural activities; encouragement of leisure and sport facilities; improvement of the interpretation of the historic city; provision of a full range of accommodations for visitors; improvements of the quality of service and of products to the visitor; improvement of visitor management)
- Public information and awareness (information actions such as technical assistance to owners, financial assistance to owners, tenants, traders, information of visitors, awareness building in schools)
- Research (preparing manuals for the conservation and maintenance of historic buildings; developing design guidelines; developing studies required by other management issues)
- Capacity building (specialized training for architects, planners, developers, craftsmen)

The Action Plan also includes Improvement Schemes and Development Opportunities. They may concern historic buildings, non-protected buildings to be modified, altered or demolished and re-constructed, streetscape improvements, commercial street improvement, signage and advertising projects, paving schemes, planting schemes, requalification of squares, etc. For all the proposed improvement schemes precise timeframes, costs, source of funding, description of works, responsible bodies, should be provided. Drawings, schemes and other graphic material will illustrate this section. Improvement projects that may be included in the Action Plan are: Re-qualification

of degraded areas, Revitalisation of commercial streets and the neighbouring buildings, Rehabilitation programmes, Improvement of public lighting: set up a public lighting program, Paving projects for pedestrian areas and squares, Public green space and children playgrounds, Improve public equipment.

In order to identify the development opportunities, a map indicating the vacant lots and the buildings that could be demolished in occasion of projects (recent, inappropriate construction, inconsistent with the historic context, and in poor condition) should be prepared as part of the Action Plan. Based on this map, the real development opportunities have to be established, by verifying the ownership status and other issues for each vacant lot. For each identified development opportunity - infill design or multiple lot development - a project has to be developed, which should comply with the regulations for the historic city and the design guidelines prepared for the given site. The site manager and a special Commission should evaluate each of these proposals and check their appropriateness.

The Conservation Plan is a detailed design drawing that shows graphically the proposed changes and addresses the treatment of the site features. Additionally, the plan might identify the phases for implementing the proposed work. Detailed conservation plan is to be produced for designated conservation areas and supplemented with regulations.

Regulations should:

- ensure appropriate conservation works
- limit the new extensive development projects, which are not compatible with traditional land-use patterns
- avoid aggressive development projects, unsuitable location or design
- allow a controlled number of visitors and avoid over-development of tourism
- favour small-scale developments and quality commercial structures
- control commercial signage and advertising
- prohibit building large-scale structures within the historic city

Guidelines may include the following recommendations:

- Avoid over-restoring the site to an appearance it never had.
- Avoid sub-division or, at the contrary, adjoining two or more lots for building one single construction
- Changes in plan and function should be based on studies that establish the limits of acceptable change.

- Avoid imitating an earlier style or period of architecture in new additions, except in rare cases where a contemporary design would detract from the architectural unity of an ensemble or group.
- Mechanical services should be installed and built in areas that will not cause damage to the plan, materials, and appearance, in places where they will be a visual intrusion.
- Safety and code requirements.
- Complying with safety requirements in such a manner that the essential character of the property is preserved and providing access for the handicapped without damaging the character of a property.

Instructors should stress that particular care and study is required for the development of Design Guidelines for the historic cities in the Caribbean, since their authenticity and integrity is seriously threatened by the inconsistent new construction. High quality and appropriate new design is rare in the historic cities of the Caribbean. Inconsistency is manifested in architectural composition and detail, rhythm, scale, massing, height, bulk, setback, character, materials, colour, roofing, that impact negatively on existing buildings, landscapes and skyline.

Conservation guidelines could be developed as a Conservation Manual. Conservation Manuals are intended to be used as a tool for contractors and property owners, to ensure that the planned changes to the property are retaining and enhancing the outstanding universal value and the historic character of the buildings, streetscapes of the protected urban area. The manual defines major structural elements and local key materials, and recommends a range of economically feasible conservation measures. This guide is also intended to promote responsible conservation practices that help preserve the irreplaceable heritage resources of the site. The Manual recommends appropriate and realistic measures to maintain and preserve their buildings and suggests guidelines for alterations to historic fabric, replacements, additions or new construction.

Maintenance issues can be also addressed in this manual, or constitute a separate document. Maintenance recommendations would suggest appropriate preventive and remediative measures property owners can take to preserve their buildings. The guidelines are generally organised by architectural components and incorporate also sections on streetscape and landscape features.

This theme presents some difficult issues of crucial importance and needs to be well illustrated with concrete examples; the exercise dealing with the same theme will help these issues be properly understood *ejemplos concretos, el ejercicio que trata del mismo tema ayudará a que estas cuestiones se comprendan debidamente.*

## LECTURE 9: Implementation, monitoring and review

**Theme:** Requirements for implementation, monitoring and review

SUBJECTS	LEARNING OBJECTIVES
1.Implementation	<ul style="list-style-type: none"> <li>•Participants become aware of how to implement a management plan.</li> </ul>
2.Monitoring	<ul style="list-style-type: none"> <li>•Participants learn how to establish indicators to measure the state of conservation.</li> <li>•Participants learn the monitoring tools and get familiar with the archives and databases.</li> </ul>
3.Review and revision	<ul style="list-style-type: none"> <li>•Participants become aware of the need for periodic review and revision.</li> </ul>

### OUTLINE OF SUBJECTS TO BE COVERED

#### 1.Implementation

Any management plan must state how and by whom it is to be implemented. A team with relevant professional skills should be set up to oversee the plan's implementation. This team needs to have sufficient institutional continuity in order to be able to embark on a long-term vision. Key stakeholders must be informed and consulted on all major decisions.

The following management framework should be used by the team for carrying out the implementation process and should be carefully defined in the plan itself:

- Understanding the resource, the agreed policies, and the problems to be resolved
- Planning the work and its programme of execution
- Organising people and tasks
- Co-ordinating and monitoring the execution of the work, and recording, with reasons, the actions taken
- Regularly reviewing the resource, the management plan policies and the resolution of problems, before further planning and programming of works

Implementation requires the following:

- Instruction and approval of the plan (publication - public hearing - approval - legislative effects of the plan)

Logistics / personnel resources to be established, being:

- a Site Manager employed by the Municipality or by the Commission for the historic city. Responsibilities include planning the implementation of the Action Plan; initiating and managing projects recommended in the Plan; liaising with key stakeholders and the local

communities; and compiling and updating annual action programs drawn from the Action Plan. The annual review of the Action Plan is also the responsibility of the WHS Manager.

- a Partnership Group: Chief Executives and Chairpersons of key stakeholder organizations.
- Working Groups will be established to facilitate implementation of specific themes or projects within the Action Plan, such as research; interpretation; promotion and outreach; or an environmental improvement project.

#### Monitoring

- The historic cities and settlements include distinct neighborhoods, with characteristic features, functions, land-uses, which need to be monitored. Taking the most recent surveys and other sources of information as a baseline, change could be monitored in different ways. The Management Plan should indicate the appropriate way to best monitor a site of this size and degree of complexity. Archives and archival records constitute an important asset for the monitoring purposes.
- Local requirements for monitoring fall under the responsibility of those organizations, or individuals, in charge of the conservation of the heritage values in the nominated site.

#### 3.Review and revision

Management policies should never be considered as definitive. Periodic review of the strategy is essential. The management plan should, therefore, be produced in a format that can be modified to adjust practice to changing demands. Regular revision will ensure that it continues to meet current needs.

# LECTURE 10: Editing a Management Plan Report

**Main theme:** guidelines for editing and presentation of a Management Plan Report for a historic city

SUBJECTS	LEARNING OBJECTIVES
1.Editing the Management Plan Report	<ul style="list-style-type: none"> <li>•Los participantes aprenden a preparar un Informe sobre el Plan de Gestión: su estructura, contenido, formato y estilo.</li> </ul>

## OUTLINE OF SUBJECTS TO BE COVERED

### 1.Editing the Management Plan Report

The instructor will explain the different formats of management plans and their common characteristics (holistic and integrated, short, concise and accessible, comparable and compatible with other plans, legally binding)

A typical Management Plan Report is structured as follows:

An **introductory section**, which may include the following:

- Management summary describing the purpose of the project
- Historical overview that provides a brief historical context for the historic city
- Scope of and need for the Management Plan and methodology for preparing it (purpose of the Management Plan, issues to be addressed in the Management Plan report, Process for conducting the work and techniques used to complete it, format of the report)
- Description of boundaries (the physical limits of the historic city: the "core zone" and the "buffer zone(s)").

The main text consists of two parts, corresponding to the 'Understanding of the site' (Part 1) and 'Decision-making (Part 2).

**Part 1** provides documentation about and evaluation of the historic city characteristics, features and qualities. Site history, existing conditions and analysis and evaluation sections identify the values associated with the historic city and define its significance and authenticity/integrity. Description and assessment is presented in both narrative text, and graphic material – plans and maps, photographs, etc.

**Part 2** articulates the preservation strategy for long-term management of the cultural landscape based on its significance, existing condition, and use. Part 2 also considers management goals and objectives for the site (policies, strategies, action plan, regulations, guidelines and manuals for the protection, conservation and maintenance of heritage, its contemporary use and interpretation, and for new development). Response is described in both narrative text, and plan and/or design alternatives (i.e. conservation plan).

The instructor will show the participants several copies of different exemplary management plan reports and comment on their different formats.

## LECTURE 11: Best practice in management of historic cities: case studies

**Theme:** Illustration of theoretical courses with case studies representing best practice in the field

SUBJECTS	LEARNING OBJECTIVES
1.Characteristics of best practice	<ul style="list-style-type: none"> <li>•Participants learn how can best practice be identified and what lessons can be obtained from the study of the key characteristics of such practice</li> </ul>
2.Examples of best practice in America, Europe and the Caribbean	<ul style="list-style-type: none"> <li>•Participants get a better, less abstract, understanding of conservation management through case studies</li> </ul>

### OUTLINE OF SUBJECTS TO BE COVERED

Previous lectures of this course have provided a variety of insights into the evolution and current state of management of historic cities worldwide. Although management of historic cities is still in its infancy and no definitive assessment of best practice is available yet, we still can consider the following criteria:

- the contributions made to the conservation of city's values
- the contributions made to the economic regeneration of the area
- the extent to which a project has acted as a catalyst for further conservation management of the area
- the contribution made to community spirit and social cohesion
- the contribution made to building the capacity of local people to plan and influence the conservation and sustainable development of the area

- the environmental sustainability of the project
- the range of partners involved

A series of case studies illustrates best practice in management of historic cities elsewhere:

- American experience (Canada: Quebec city; Mexico: Campeche and Oaxaca; Uruguay: Montevideo; Ecuador: Quito),
- European experience (UK: historic cities of Bath and Edinborough; France: historic centres of Bordeaux and Lyon; Austria: historic centres of Vienna and Graz; Italy: historic cities of San Gimignano and Sienna), and
- Caribbean experience (Cuba: Old Habana; Curaçao: Willemstad).



## Conclusions and closing

The last session sets out the conclusions to the module and to the exercises.

After an overview of all themes the information gathered by the participants during their field and class work is summarized.

The instructor recalls the concepts related to conservation and its benefits to the historic city and how heritage can be a catalyst for social and economic regeneration.

The link between conservation and sustainable development are underlined, stressing that re-using buildings and improving public spaces help reinforce a sense of place, while new large-scale developments risk losing the fine grain that characterises historic areas. Moreover, restoring the historic buildings creates jobs and helps underpin local economies. **An attractive historic city can help to draw in external investment as well as sustaining existing businesses of all types, not just tourism-related.**

The historic city contributes to quality of life and enriches people's understanding of the diversity and changing nature of their community. Mixed use, high-density, human-scale historic neighbourhoods are a model for new sustainable communities. Historic places are also a powerful focus for cultural activities.

Finally, the session ends with a brief review of the conservation ethics.

The participants are invited to create a regional network to continue the debate and the exchange of experiences and skills.

The course ends with the official closing by key representatives of the local conservation authority.

## Field visit

**Main objective:** to allow participants to apply the concepts learned in the course by simulating a real project situations and to collect background information for the exercises.

SUBJECTS	LEARNING OBJECTIVES
1. Defining the boundaries of the 'historic city'	<ul style="list-style-type: none"> <li>• Participants became aware of the criteria to define the boundaries of a historic city – core and buffer zone.</li> <li>• Participants become aware of the relationships between the historic area and the larger city.</li> </ul>
2. Knowing the historic city	<ul style="list-style-type: none"> <li>• Participants learn how to look at and how to 'read' a historic city with management objectives in mind.</li> <li>• Participants learn how to record the field data.</li> </ul>
3. Planning and conducting the field visit of the study area	<ul style="list-style-type: none"> <li>• Participants learn how to plan and conduct a field visit, according to different purposes.</li> </ul>

- The first part of the site visit concerning the historic city and its built and/or natural environment will be done with all the participants, while the second part will involve work in smaller groups, focusing on the case study area
- The site visit will be organized in advance. The instructor should prepare a package containing all the elements of the place's history and topography (written documents, plans, cadastres, iconography and a current tourist map). This material should be provided by the instructor the first day, during the 'Introduction to the module'. Sufficient copies of all this information should be prepared to provide one copy for each participant.
- Guided by the instructor, the participants start the visit in one strategic access point in the historic city (a city gate, for instance) and walk along and beyond the established borders of the site (the 'conservation area' if already designated at national level, or the 'World Heritage Site' if inscribed on the WH List)
- If the historic area is not identified yet, the instructor should prepare in advance a proposal of boundaries for a potential historic area to be considered for protection. **The participants are encouraged to review the proposed boundaries, according to their own findings and criteria.**
- The instructor will explain the criteria for defining the 'conservation area' and highlight the complexity of this task

### 2. Knowing the historic city

- The instructor should mention that the definition of a historic city, for management purposes, may be quite different to the definition of a historic city for research or conservation purposes. For example, the historic city management project may be confined to making changes within the designated conservation area, but planners will also have to consider broader geographical factors (buffer zones, the whole city, or its region) in order to manage the protected area of the historic city effectively.
- The instructor will explain the importance of the context (built or natural environment surrounding the historic area), its positive and negative impacts on the site, the imperative integration of the historic area within the larger city, the role the historic city play (or may play) in the development of the greater city

Issues to consider when thinking about boundaries are:

- the geography of the area
- connections with other heritage places
- local and indigenous community interests
- sensitivity of any specific parts of the area
- local and regional planning and administration.

### 3. Planning and conducting the field visit of the study area

- The visit will continue inside the historic city area. The instructor will point out the main characteristics of the site: the main monuments, the vernacular architecture, the architectural styles, the main typologies, the urban morphology, the main uses and their localization, the commercial areas, etc.
- The instructor should identify in advance the study areas within the historic city boundaries - one per team - and assign them to the teams.
- Each team will acknowledge the limits of the study area (a block or neighbourhood); the team leader will divide tasks and establish a time schedule for

observations and notes and for relating field data to other types of data

- The participants will make field observations and take field notes (written notes, free-hand sketches, photographs) to enable them to:
  - analyze the relation of the study area with its surroundings (natural or wider city)
  - identify the character-defining features of the site
  - identify the main development stages in the urban history of the site
  - identify the main architectural typologies and architectural styles

## Exercises and seminars

**Main objective:** to allow participants to apply the concepts learned during the lectures

SUBJECTS	LEARNING OBJECTIVES
1.Setting up the field visit / exercise	•Participants learn about the objectives of the field visit / exercise, and get familiar with the expectations of the organizers, the time schedule and other logistical matters. Participants should receive their background information packages during the introductory session, so that they can reflect on the themes and anticipate questions.
2.Development of the field visit / exercise	•Participants are guided through the work sessions.
3.Conclusions of the exercise and presentation	•Participants present conclusions to professional / public audiences, and receive feedback on their work.

### 1.Setting up the field visit / exercise

- The exercise is site specific and should take in to account strengths and weakness of the chosen site. The site, its characteristics and size, should be chosen according to: 1. the location of the course; 2. easy access to it; 3. the profile of the participants and their expectations; 4. the challenges the site

presents; 5. and finally its capacity to best illustrate the themes taught in the course.

- The exercise encourages team work. Smaller groups of participants shall work together on a common theme but different locations, or on different sub-themes at the same location, depending on the exercise. This allows participants with diverse

backgrounds to exchange and share experiences, while approaching the theme from different, complementary angles, and to build consensus by integrating different, often divergent, perspectives.

- During the first introductory session, the instructor asks participants to make teams and choose team leaders.
- The composition of teams should consider mixing participants with different backgrounds, to better simulate real situations.

The subjects of the 4 exercises are related to specific lectures, and include the following themes:

- Inventory of built structures and open spaces from a section of the historic city (a block, or a neighbourhood)
- Assessing values. Statement of Significance (or Statement of OUV, for World Heritage Cities)
- Identifying management issues; conducting a management context survey
- Linking analysis to decision-making: establishing policies, setting-up objectives, formulating strategies, preparing the Action Plan

#### **Development of the exercise**

- Enough time should be allowed for participants to be fully briefed on the requirements, expected outcomes, to read and carry out research, to visit the site, and to work together. Time should be well calculated for each activity, given the tight schedule of the module.
- The site visits should be well organized and necessary background information for the purposes of the exercise prepared in advance: introduction to issues, summary of local experiences in the past, constraints and available resources. A local resource person to assist during the one-week course should be identified.

- An exercise package should be prepared well in advance with all basic reference data useful for the 4 exercises: maps, drawings and photographs of the site, and its important features, chronology of main historic events, copies of relevant regulations, procedures, commitments, protection plans etc. This information can not usually be obtained quickly; therefore, its acquisition should be planned well in advance. Each participant should receive an exercise package.

#### **Conclusions of the exercise and presentation (Seminar)**

- The conclusions of the exercises and the results of practical work will be presented during the seminars following each exercise.
- Enough time should be allowed for each team work presentation, feedback and concluding discussions of all presentations.
- The presentations will follow an established format (a general introduction of the theme in relation to the study area, a brief presentation of the work plan, the work method, and results), and strict time guidelines.
- It is recommended to invite in the audience those responsible for matters related to the subjects of the exercise, as to get a more realistic feedback.
- The role of feedback in the whole exercise should be emphasized by the instructor in charge with generating and leading the interactive discussion. Several levels of feedback will apply: feedback from the other teams, from the instructor(s), from the audience.
- Each seminar will end with concluding remarks by the participants, who are asked to evaluate the effectiveness of the exercise.

# EXERCISE 1: Inventory of built structures and open spaces

SUBJECTS	LEARNING OBJECTIVES
1.Planning methodology for the inventory of built structures and open spaces	<ul style="list-style-type: none"> <li>•Participants become aware of the main steps of conducting an inventory of built structures and open spaces of a historic city.</li> <li>•Participants learn how to plan the inventory-tasks, timescales, resources.</li> </ul>
2.Introduction to the use of GIS	<ul style="list-style-type: none"> <li>•Participants get familiar with the use of information systems in inventories.</li> </ul>
3.Designing draft survey forms	<ul style="list-style-type: none"> <li>•Participants learn to design a survey form, specific for each historic city.</li> </ul>
4.Surveying and recording	<ul style="list-style-type: none"> <li>•Participants learn to conduct the survey of built structures and open spaces and to computerize the field records.</li> </ul>

## Guidelines for conducting the exercise

- This exercise refers to a section (a sample) of the historic city: a block, or a neighbourhood and involves both field and class work.
- The work place should be equipped with enough computers to enable each team to computerize a survey form sample.
- It is best for this exercise to have an instructor for each team, to best supervise field and class work.
- The exercise focus on planning the inventory, including the preparation and use of a customized survey form.
- Planning includes a preliminary phase consisting of documentation and collection of maps and previous inventories from local repositories. This material should be provided by the instructor the first day, during the 'Introduction to the module'. Sufficient copies of this information should be prepared to provide each participant with one copy.
- The instructor will explain the work schedule and assign the tasks. The established groups become the survey teams.
- The participants will check on-site the accuracy of the available cartography and indicate if an updating is needed. Then the study area will be divided into sectors and blocks, and each block and sector will be identified.
- At this stage in the process, the construction of a GIS and the computerization of the above will be explained. However, for the sake of this exercise, the record of survey data will be done in Excel, since the purpose of the exercise is to simulate the planning methodology of the inventory rather than the use of GIS, which can stand on its own as a module.
- The team will prepare collectively 3 types of survey forms - for remarkable buildings, for public open spaces (private open spaces being included in buildings forms), and a simplified one for ordinary buildings - containing descriptive and prescriptive data and 1 or more photos. Each form should have no more than 2 pages.
- The participants will test the survey forms and review them. Then, each participant will fill-in one form, corresponding to a built structure or an open space. Each group has to cover all the categories above mentioned.
- The surveyed data will be further computerized (Excel)
- The instructor will outline how to create, use and manage a GIS database.

## EXERCISE 2: Assessment of values. Statement of Significance

- This exercise involves class work only
- The exercise will simulate a consultative process involving stakeholders. Therefore, the participants would act as stakeholders
- Given the nature of this exercise, it is preferable to have an instructor for each team

SUBJECTS	LEARNING OBJECTIVES
1. Assessing and balancing values	<ul style="list-style-type: none"> <li>• Participants become aware of the methods used to identify and analyze a wide range of heritage values.</li> <li>• Participants learn how to ascribe and prioritize site's values</li> </ul>
2. Statement of Significance	<ul style="list-style-type: none"> <li>• Participants learn how to formulate a statement of significance (or a statement of outstanding universal value, for a world heritage site)</li> </ul>

### Guidelines for conducting the exercise

- The cultural significance of the study area can only be assessed in relation to the historic city and the wider Caribbean cultural context. The multi-valence of Caribbean heritage suggests a pluralistic, eclectic approach to value assessment. Comparisons with similar properties in the region are necessary for best assessing the cultural significance of the given site and its singularity.
- Each team will work independently, under the guidance of the instructor(s).

Participants are invited to:

- Ascribe values to the site and list them in a hierarchic order
- Relate values to features and characteristics of the site
- Draft an updating Statement of Significance for the study area, if the site is not inscribed. Draft, or update, the Statement of Outstanding Universal Value (OUV) of the site, if inscribed on the World Heritage List.

- In order to facilitate the assessment, the instructor should propose a provisional typology of heritage values. By suggesting such a typology the views of different participants can be voiced and compared. However, the instructor should highlight its provisional nature, since this typology may not be appropriate for the given site, but simply an attempt to create a common starting point from which another typology, specific to the study area, can be constructed. The provisional typology may include cultural values (Historical, Aesthetic, Symbolic, Spiritual/Religious, Political) and socio-economic values (Social, Use, Non-use value).
- The participants will place different values and establish a hierarchy of each heading.
- Then a list of significant elements, features and characteristics of the site in which the above values are embodied shall be established during this exercise (i.e. juxtaposition of architectural styles, distinctive urban layouts, urban form and natural elements, townscape, landscape setting and views, historic buildings and interiors, statues and monuments, multicultural communities, etc.).
- Based on this assessment, the participants will draft a Statement of Significance, as a concise synthesis of cultural significance.

## EXERCISE 3: Identifying the management issues; conducting a management context survey

- This exercise involves class work only.
- Given the nature of this exercise, it is preferable to have an instructor for each team.

SUBJECTS	LEARNING OBJECTIVES
1.Current management context and its impact on the future conservation and management of the historic city	<ul style="list-style-type: none"> <li>•Participants become aware of the need to assess the current management context.</li> <li>•Participants become aware of the current constraints and opportunities that will affect the conservation and management of the site.</li> </ul>
2.Management issues	<ul style="list-style-type: none"> <li>•Participants learn to identify key management issues</li> </ul>
3.Conducting a management context assessment	<ul style="list-style-type: none"> <li>•Participants learn how to conduct a management context survey</li> </ul>

### Guidelines for conducting the exercise

- Relevant factors other than the state of conservation that may affect the management of the site can include: legal framework, resources availability, regional and local development context, research and education, land use and development pressures, tourism development, community needs.
- Participants first collectively identify key management issues of the entire historic city and then, in smaller groups, the specific issues relevant to their study area.

Examples of major issues, which may be considered, are:

- Regional context and planning
- Ownership of heritage resources and legal regime
- Regional land use patterns and development pressures
- Existing plans and proposals
- Restrictions resulting from significance of the historic city
- Other cultural or social constraints

- Key stakeholders views, input and planning
- Local community involvement
- Management structures
- Physical condition of the historic city and its environment
- Physical or environmental constraints
- Infrastructure condition and planning
- Human, material and financial resources
- Present and projected visitor use patterns
- Power structure at local, regional, or national level
- Political attitudes and degree of support
- Financial resources

Based on the identified key issue(s) a provisional checklist of questions shall be prepared by each team, to be adjusted and completed during the seminar discussions, as to suit the specific context of the study area. This questionnaire may be used in “real life” situation for interviews, or addressed in printed form to key stakeholders, as an assessment tool.

At the end of this exercise, the instructor will indicate how to analyze the collected data and use it for management purposes.

## EXERCISE 4: Linking analysis to decision-making: establishing policies, setting-up objectives, formulating strategies

- This exercise involves class work only.
- Given the nature of this exercise, it is preferable to have an instructor for each team.

SUBJECTS	LEARNING OBJECTIVES
1. Summarizing the assessment phase: main values, issues, conditions of the historic city	• Participants acknowledge the passage from analysis to response and get a clear understanding of the balancing process.
2. Establishing policies	• Participants learn how to establish management policies.
3. Setting up objectives	• Participants learn how to set up management objectives.
4. Formulating strategies	• Participants learn how to formulate management strategies.

### Guidelines for conducting the exercise

- The objective of the fourth exercise is to understand a critical step within the planning process: the way the descriptive and analytical phase is translated into decisions. This exercise would thus simulate the linking of findings to plan assumptions.
- A preliminary concise summary of the main values, issues, and conditions of the historic city should be prepared in order to facilitate the balancing process resulting in 3 levels of response, progressing from general to specific: policies – objectives - strategies.
- The group discussions will then focus on the development of policies, management objectives and strategies.
- It is proposed to choose one element identified by the participants in exercise 3 as one of the significant characteristic of the historic town, such as 'outstanding townscape', for instance.

Different levels of risks to the city's townscape will be chosen from the assessment summary – one per team, i.e. "Loss of quality of historic city's outstanding townscape through:

- loss of traditional materials and inappropriate or poor maintenance of the public space;
- negative impact of vehicular traffic and its poor management;
- fire or flooding;
- inadequate planning controls or their poor application;
- insensitive developments in or adjacent to the site, etc."

For each risk, one or several policies will be formulated. For example, for risk (1), the policies may sound as:

- To manage the public space of the site in a way that respects, promotes and enhances its cultural significance
- To encourage the availability and use of traditional materials
- To promote the retention or re-establishment of conservation skills
- To promote best practices in the design of streetscape improvement and traffic management
- To respect the existing color scheme in new work and in the maintenance of the existing historic fabric
- To reduce the proliferation of street signs and other street furniture (stops, parking meters, benches, traffic signs, etc)

Based on policies, objectives will be set up (i.e. "To conserve the public open space and enhance those features from which its character is derived"), and appropriate strategies to achieve them will be defined.

In reference to our example, strategies would concern: paving, street furniture, conservation of historical buildings, public art, specific planning controls for signs, advertising, tree planting, color, air conditioning, satellite antennae)

Another outcome expected from the 4th exercise is the identification of issues to be addressed in priority.



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For World Heritage



United Nations  
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Regional Bureau for Culture  
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MODULE

# 5

PATRIMONI  
WORLD  
HERITAGE