# Interdisciplinary Handbook on Heritage Protection, Management and Communication

Volume II

# MANAGEMENT

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# Interdisciplinary Handbook on Heritage Protection, Management and Communication

## Volume II – Management

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**Key Action 2: Strategic Partnership Projects**

# Interdisciplinary Handbook on Heritage Protection, Management and Communication

## Volume II – Management

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EDUGAME

# MANAGEMENT OF A HISTORIC SITE

**EDUGAME HANDBOOK chapter**

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## 2. Management of a Historic Site

Management of a historic site should be an activity that encompasses all tangible and intangible aspects of the reality in which the site is located and functions. However, it is not possible to manage, or even just analyze, such a complex whole. Therefore, it is necessary to focus on the aspects which are crucial for the preservation and use of the monument and at the same time are within the manager's scope of activity.

Bearing in mind the key tasks and problems of a monument manager - protection, management, use, three problem areas can be distinguished, within which the manager should gather information and undertake actions.

The first area is the general characterization of the monument, which should include key information about the site regarding its ownership, technical characteristics, management and operational conditions. This characterization should include information important to the management of the monument with the exception of information regarding its preservation and management systems.

The second area is the preservation and management system of the historic site. This area should analyze the current solutions and identify problems related to the management and protection of the monument. On this basis, solutions to improve these systems should be proposed.

The third area is the use of the monument. This broad term entails the use based on the historic values of the monument and all other utilitarian functions that the monument can perform as an object (without direct relation to the historic values).

Characterization and analysis of the situation in these three areas is at the same time the basis for identifying problems that should be solved by the monument manager. The analysis of the collected information should also be the basis for proposing solutions to the identified problems. This is also the task of the monument manager. The collection of information, identification of problems, and development of solutions are the sum total of necessary actions that should be performed within the framework of monument management and should be presented in Management Plans - documents that should be developed to ensure the proper protection and use of monuments.

## 2.1. General characterization of a monument

The first area requiring identification and collection of information is the overall characterization of the monument. This characterization should first include information that presents the monument as an object with specific parameters, existing under specific conditions that determine the possibility of its protection and use. It is therefore a characterization of the object and the context in which it exists. Second, it is necessary to characterize the historic values of the historic site. Precise determination of the monument's value and its material supports is the basis for defining the subject of protection and the scope of possible interference with the monument. Thirdly, the overall technical condition of the monument should be characterized. This is an obvious basis for planning conservation works, their costs and completion dates.

### 2.1.1 Characteristics of a monument and the conditions of its functioning

Characterization of the monument should include the essential elements and aspects, important for the representation of the property, primarily as a building existing in a certain reality. The characteristics include, first of all, historical, administrative and localization information, description of the material form of the monument and a number of information concerning its contemporary functioning.

The first group of information should be the data concerning the history of the monument. In historic sites, the amount of information that relates to facts, people, and events associated with them can be very large. From the management point of view, not all of them are significant. Instead, two groups of information are important.

First, information about key events and figures that were directly related to the history of the site is important, especially if they had broader historical value. The events and people associated with a site form its historical context, which accounts for its intangible values. If the events or people associated with the site are of special value (historical, symbolic, artistic), the elements of the site from that period may be subject to special protection or display.

In the history of a site, information related to its material transformations is also important. Most historic buildings, especially those that have been in existence longer, have been transformed. This was due to changes in architectural fashions, functional transformations, changes in standards, various types of destructive events (fires, wars, floods, etc.). Interferences and disasters transformed the object, changing its value. Therefore, it is necessary to collect information about the history of transformations of the object and relate it to the materially existing elements of the monument. This information is important for the concept of monument preservation.

The second group should include information regarding the material characteristics of the monument as a contemporary existing object. Also in this case, it is necessary to choose the information that is important from the management point of view.

First of all, it is necessary to characterize the monument as an object. We need information about the location, individual elements, surface, volume, number of floors, plot of land on which the monument is located, etc. This is basic information that the manager of any building needs.

Information about the owners and users of the building is also important for the manager of the monument. In some cases these are explicit, but most often there are more partners managing a monument - owners, users, managers. Their powers, objectives, and capabilities may be very different, which complicates the management of a historic monument. Therefore, it is necessary to identify all stakeholders who are directly involved in the management of a monument.

Information that characterizes the manager is also very important. The manager's actions are critical to the protection and use of the historic site, so information about the manager's capabilities must be collected. This information includes the organizational structure of the managing institution, its competencies, qualifications, size, financial possibilities and experience. Gathering and analyzing this information allows to assess whether the monument can be managed properly, what actions should be taken to improve the quality of management, and what are the possibilities of using the monument and introducing new functions.

Basic information about the use of the monument can also be collected and presented in this data package. However, these should generally be the subject of a separate, detailed analysis (Section 3 of the chapter).

The third group is information characterizing the environment in which the monument functions. The protection and use of a historic site should be determined by its historic value, use potential, and the plans and capabilities of the manager. In practice, however, each historic site functions in a specific cultural, social, economic, legal, locational, etc. reality. These factors greatly determine the protection and use of a historic site. Therefore, it is necessary to recognize them by characterizing the most important elements that can be used by the manager.

Crucial factors are the economic conditions and the economic situation of the environment in which the monument is located. The level of residents' wealth and the condition of the economic environment determine the forms of the monument's use and the possibility of supporting its protection. The tourist attractiveness of the surroundings, which is very different in character, is also a factor that significantly influences the possibility of the monument's use.

The cultural, social, and demographic potential of the surroundings is also important. A historic site in a large city can be developed even for niche cultural purposes and function well.

Assessing the location of a monument on a smaller spatial scale can also be very important. For example, the location of a monument in the city's structure is important; central districts, where there are many potential users, are generally better. However, transportation accessibility, parking lots, and proximity to other attractions are also important. The importance of such factors depends on the specificity of the monument's function.

In general, the analysis of information regarding the broad context of a monument is important both for its protection and use. It should be emphasized that the information about the current situation and the planned actions is important (the source of information should be the regional development plans and strategies).

#### 2.1.2. Characterization of the historic values of a historical site

Characterization of the historic value of a building is the basis for creating an appropriate concept of its protection and use. The characterization should include information and analysis of all parameters that are important from the point of view of the monumental status of an object. In practice it means possible to precisely define historic values of an object and parameters characterizing its condition (as a monument), i.e. authenticity and integrity. A thorough and clear presentation of these elements is very important as it is the basis for determining what is the subject of protection and what should be the limits of interference with a historic site.

The subject of the first analysis is therefore historic values. Adopting the perspective of the monument manager, it should be assumed that the determination of the monumental values of the object should be carried out by the conservation services. Historic monument status is granted to a historic site based on a formal decision by an authorized authority, which justifies it. The justification for the decision should indicate the values that the object represents.

The range of values that a monument may represent can be very wide. Historic values are not formally codified, although conservators use various typologies of values. For example, the Polish law governing the protection of historical monuments, while defining a monument, generally indicates its historical, artistic and scientific value. Therefore, in each case the specialists should individually determine the value of the monument. It should also be emphasized that the qualifications and experience of the specialists analyzing the monument are really important, as there are no formal schemes indicating how the monument values should be identified.

Determining the value of a monument is comparative in nature. This means that the monument (element, feature) being analyzed is compared within an appropriate reference group. This is the only way to determine the value of a monument. Valuation also requires the establishment of criteria based on which the comparison is made. Another determination must involve the adoption of a measure to evaluate the criteria. These three elements must be established to make a value judgment. Both their determination and their use - the making of the valuation process - require specialized qualifications. You greater that it is always an individual process.

Appraisal of monument values also requires linking them to material carriers. The tangible carrier of value is a physically existing historic site or its elements. Also the intangible values of the monument require specific representation, as the monument is the "embodiment" of such values. The relations between the values and their material carriers must be established, as the subject of conservation is the physically existing monument. The conservation activities aim at consolidating, completing, and creating such a form of the monument/object so that it represents the historic values to the fullest extent possible. Therefore, determining the material value carriers should be the basis for planning the conservation works.

Determining the material value carriers is also of key importance for the use of the monument. Modern utilitarian functions generally require interference with the monument, even if the use involves the least invasive adaptation. Monument managers therefore need to know what elements of the monument can be transformed to some extent. This knowledge is the basis for expanding the use program, which is now a frequent task and goal of managers.

Thus, assessing historic values and identifying their tangible supports is very important to the preservation and use of a monument. This analytical process should be performed by historic preservationists, but the manager of a historic site must understand it. Interpretation of the valuation analysis of a monument is a part of his/her everyday work - all activities interfering with the historic form and substance require it. In addition, the factors influencing valuation are changing, which means that the evaluation of historic values is a dynamic process in which the manager should also participate.

The initial source of information regarding historic values should be the documentation of the monument. In Poland, the basic document is the entry in the Register of Historic Monuments and various documentation gathered by the Voivodeship Historic Monument Conservation Officer (e.g., white cards). In the case of UNESCO World Heritage Sites, it is the official nomination documentation accepted during the monument's inscription on the List (mainly the so-called OUV ruling).

The second object of analysis should be the authenticity and integrity of the monument. These two complementary features/parameters together allow to determine the state of preservation of a monument - this refers to the monument's value, not its technical condition, which is assessed by other methods.

Authenticity is considered to be the key feature, describing the state of conservation of a monument and at the same time the criterion which allows to assess the correctness of works carried out on it. Authenticity is the assessment of the genuineness, reliability, identity of the object/element examined in relation to the accepted prototype. Authenticity analysis is therefore the examination of an object, consisting in comparing it to its original state (to which a value has been ascribed).

As in the case of valuation, the evaluation of authenticity must be based on criteria which allow the monument to be assessed in selected aspects. In the European tradition, authenticity of form and substance was evaluated. However, the process of broadening the criteria led to the adoption of the so-called Nara Document in 1994, which stipulated that the evaluation of authenticity should be carried out only within a given cultural context. Depending on this context, the criteria for authenticity evaluation - besides fora and substance - may also include location, workmanship, material, and other factors accepted in a given culture. Thus, on a global scale, the evaluation of authenticity has been relativized, although in the case of European monuments, the evaluation of fora and substance is still mainly applied.

Authenticity assessment may be carried out in relation to the whole monument as well as its individual elements. However, there is no scheme for summing up the evaluation of individual elements, which would allow to make a comprehensive assessment of the authenticity of the monument. Neither is the summation of assessments of individual criteria (parameters), in the light of which authenticity can be assessed. On the other hand, the authenticity of the existing historic monument, the authenticity of the restoration works carried out (or planned) and the changes in the authenticity as a result of the introduction of utility functions can be assessed separately.

The information presented here indicates that the assessment of a monument's authenticity can be carried out in many aspects. Since the assessment of authenticity involves comparing the current form of the monument with its original forms, this activity requires in-depth knowledge of the monument in different periods. This is specialized knowledge, often requiring research of the object. For this purpose, monument managers need specialized assistance. On the other hand, the results of these assessments should be known by the managers and taken into account in the protection and use of the monument.

The second characteristic that reflects the condition of a monument from the point of view of historic preservation is integrity. Integrity is a parameter that evaluates the completeness of the monument. An integral monument is a monument that has retained all of its constituent elements relevant to the form that has been determined to be of value. As with authenticity, integrity is assessed by comparing the present form of the object with the original form. And, as with authenticity, measures of integrity are not introduced - estimates of integrity expressed as percentages are used.

Integrity assessment is not directly applicable to strictly conservation work. It can, however, provide guidance for possible restorations. An increase in the integrity (completeness) of a historic complex may justify the performance of contemporary restorations. On the other hand, lowering integrity is a factor that may be helpful in evaluating actions that will result in the destruction/reshaping of, for example, less valuable elements of a historic complex.

Thus, also the assessment of integrity requires knowledge of the different phases of the historical development of the monument. In turn, an understanding of this parameter is needed by the manager in planning activities that transform the historic site/complex.

### 2.1.3 Characterization of the technical condition of a historic site and the conservation tasks

One of the most important tasks of the manager of a monument is to maintain it in an appropriate technical condition. Monuments are buildings which in most cases perform various contemporary functions, therefore, they must meet the applicable functional, technical, usable, aesthetic, safety, accessibility standards. Therefore, they must be maintained in an appropriate technical condition, monitored and repaired.

In historic buildings, an additional difficulty arises from the need to meet conservation requirements, which may far exceed the level of maintenance of an ordinary building. This is due to the requirements concerning the quality of conservation work, the materials used, the pace of that work, and of course, the cost.

The manager of a historic building should therefore carry out two types of work - repair and conservation. In some areas, these works may overlap and complement each other. However, most conservation work must be treated separately, carried out by other professionals, to a different standard, and using different materials. The monument manager should take into account the separateness of these two groups of activities.

The basis of maintaining a monument in an appropriate technical condition is its regular evaluation. Technical condition assessment is a complex activity. Generally, the scope of technical condition assessment of buildings is individual, as it depends on many factors resulting from the specificity of the building, such as its age, degree of wear, forms and intensity of use, research capabilities, users' needs, renovation or adaptation plans. Therefore, in practice, no universal assessment standard is applied. Out of many elements of a building and parameters, which determine its technical condition, only those needed in a given situation are examined. The limitation is also the time of testing, cost and possibility of execution - assessment of all the elements of the object is therefore an exceptional activity. Therefore, in engineering practice, there is no standard of comprehensive assessment of the technical condition of an object.

However, monuments constitute a special group of building objects. They are distinguished by several features, which are important for the assessment of their technical condition. First of all, historical buildings were built a long time ago, so the technical solutions and materials used in them usually do not meet the contemporary standards. The passage of time also causes that the processes of their deterioration take a long time, which results in their considerable advancement. Monuments represent values that justify their special status and treatment. The objects that support them should be in good condition, which requires their comprehensive diagnosis. Finally, historic buildings are adapted to modern utility functions, which often requires complex interventions in the substance and form of the monument. Thus, a comprehensive assessment of technical condition is needed for many reasons.

In recently built objects, documentation that includes a technical description and relevant drawings can be used to assess the technical condition. In historical objects usually documentation is only fragmentary or does not exist at all. Therefore, it is necessary to prepare technical description and drawing inventory as the basis for technical condition assessment of the monument. Moreover, in the light of the ongoing processes of destruction and transformation of the monument, such documentation is also treated by contemporary conservators as a form of its protection. This gives the documentation additional value and justifies its preparation.

If the monument documentation is not complete, then, apart from the condition assessment, it is also necessary to carry out the technical description. The basis for these activities is the analysis of the existing documentation materials and local inspection (from the expert's perspective) or systematic monument inspection (from the manager's perspective). Local inspection serves the purpose of comprehensive collection and updating of information about the historic monument condition. The information can be supplemented with research conducted in situ and in the laboratory (on the basis of collected samples).

A systematic survey of a monument thus involves the collection of information in several forms. It includes the following activities:

- interviews with direct users and managers
- detailed photographic documentation
- making (updating, supplementing) the inventory
- uncovering important building elements (walls, ceilings, plaster, etc.)
- macroscopic examination of wooden elements, walls, plaster, paintings,

- collection of materials for laboratory tests
- documentation of significant destructive processes threatening the safety of the object (sketches, notes),

The information gathered during the inspection of the monument will make it possible to prepare or supplement the technical description, which historical objects do not have, but which is useful in management.  Such document should include the following elements:

- general characteristics of the object
- architectural description
- structural description
- structural description
- description of restoration works carried out

The information gathered during the described activities is the basis for the assessment of the technical condition of the monument. The assessment is usually made by dividing the elements, grouping them in accordance with the division in the technical description. This allows to establish their hierarchy - for the safety of the monument and its users, the assessment of structural elements is the most important.

The assessment of technical condition of a building is a complex operation requiring competence and experience of structural engineer. On the other hand, the administrator of the monument should acquire information helpful in planning its protection and use. The information about the condition of the building should be the basis for repair, renovation and maintenance works for the manager of the monument.

The technical condition assessment carried out by the specialist should be detailed and include the description of the damage, analysis of its causes and repair suggestions. From the management point of view, it is also important to assess the overall condition of particular elements of the facility, which is related to the urgency of intervention. Usually 5-grade scale is used - emergency, insufficient, sufficient, good, very good. It is also possible to sum up the assessment of particular elements and determine the overall assessment of the monument's condition. Such assessment is approximate, but has an informative value, especially useful in external evaluation of the monument.

The technical condition assessment performed from the construction perspective includes the whole facility. However, special treatment should be given to elements significant for the historic value of the historic building. Assessment of the condition of these elements must be particularly careful. In many cases it requires specialist qualifications - from the assessment of the condition of the basic building materials to the assessment of the condition of elements of architectural design. Evaluation of historic elements is complicated by the fact that the expert is also not expected to indicate how to preserve (not replace) the authentic element. In this aspect, building evaluation differs from conservation evaluation.

The most valuable historic elements should obviously be preserved in the best possible condition. This may require specialist conservation works. Their essence is to consolidate the historic form and substance, to protect it from destructive factors and to make it more legible. In conservation work, even more important than in construction, are the specialist qualifications of the contractors and their compliance with the principles of conservation.

As in the case of construction work, the manager should prepare a conservation work plan, taking into account first of all the historical value of individual elements and the urgency of the work (the advancement of the destruction process).

To sum up, it can be said that the technical condition assessment should lead to a comprehensive knowledge of the condition of the building, the impact of destructive factors and the concept of repair and conservation works. The technical condition assessment should also result in the development of a plan and a schedule of repair and conservation works. Documentation of the technical condition, if it is comprehensive and also includes technical description with inventory and photographic documentation, is also a form of monument protection.

## 2.2. Monument protection and management system

The second major area requiring identification, information gathering, and development of an action plan is the historic preservation and management system. Historic preservation is often treated as an autonomous activity focused on protecting its historic values, which is carried out by specialized preservation services. In practice, however, it is a part of much broader activities involving many stakeholders, and the most important role is played by the owner or user of the monument.

Therefore, monument preservation should be treated as an integral part of its management.

Management of a historic site is the sum of the actions taken to maintain the site by the various parties who have the authority and are required to carry them out. These entities are usually several, which results from the specificity of the monument. The most important position is held by the owner of the site, who may be its user or manager. These three functions - owner, user, and manager - may be combined in various configurations. The second important entity is the conservator who may act at the site in various ways, from agreeing to and ordering the works, through financing the works, to taking over the site (in extreme cases). The third entity is the state - which makes laws regarding monuments, and local government, which at its level can also make various laws directly affecting the monument. The state and local government may also influence the management of the monument in other ways, such as funding various works. In practice, there may be more entities influencing management as it depends on individual circumstances.

An analysis of the monument management system should include all partners who are involved in the process. Each should be identified, assessed for their ability to act, and their actual participation in the management process. This information should be gathered and used to create an optimal management system for a particular site. This task should be performed by the manager directly responsible for the site, which is most often the owner. This means that the owner's perspective can be used to analyze the management system and the other partners should be treated as stakeholders in the management process.

The management of a monument should include all aspects related to its conservation and use. Each of them should be analyzed, evaluated and possibly improved. Therefore, heritage management can also be defined as the manager's activities in which he or she should make optimal use of external support opportunities. Of course, the complexity of the elements important to the management of a monument varies, depending primarily on the scale and function of the monument and the characteristics of the manager. Single historic buildings and most historic complexes do not form complex structures from the management point of view. Their managers are usually private individuals or small entities. Therefore, the management process of most historic buildings and complexes can be reduced to a few main elements at the analytical level (this does not apply to historic old town complexes, the management of which is a complex problem).

From the point of view of managing a historic site, the following elements are key:

- formal and legal status of the object
- organization and qualifications of the managing entity
- financing of the object
- material resources of the manager
- cooperation with stakeholders
- utilization of the monument
- maintenance of the monument in the proper technical condition
- protection of historic monuments

The characteristics and importance of the various elements that make up the management of a historic site vary. Some problems can be solved directly by the manager in a sustainable manner, while others require participation in complex, dynamic processes involving many partners, often independent of the manager. This group of problems includes the protection of historic values, collaboration with stakeholders, and the use of the historic site. Their complexity requires a separate presentation. However, the less complex issues may be briefly characterized collectively in some of the most common forms of contemporary monument use.

### 2.2.1 Forms of contemporary use and management of monuments

The great diversity of historic buildings, their uses, financing, ownership, etc., would require separate separation and analysis of many groups of historic buildings. This goes beyond the framework of this study. Therefore, in some simplification, we can distinguish several main groups of buildings, for which it is possible to create common characteristics, taking into consideration several factors important for their management process.

<u>Objects performing public utility functions</u>

Monuments defined as objects performing public utility functions are such objects as offices, schools, representative buildings. The essence of separating this group is the public function that is performed in the historic building.

In such buildings, the current utility function is often the same as the original one (e.g. a school or a town hall) or in some way similar (e.g. the seat of the authorities in a former palace). Therefore, the realization of such utility functions does not require radical interference in the historic form of the building.

In case of this group of functions the manager of the institution located in the monument is at the same time the manager of the building. Thus, the manager's competences result from the specificity of the institution's operation; they are not related to the protection of the historic building. Usually such managers appreciate the importance of the historic site, but their priority is the efficient implementation of the essential function.

The funds used to maintain a public historic site are part of the institution's budget. Their size is therefore a function of the financial condition of the institution (which can vary widely). Current maintenance of the building is usually financed, while additional funds are needed for the maintenance repairs.

Historic buildings in many cases are good places for public functions. Managers usually understand the need to protect historic values. However, the priority of utilitarian functions means that such buildings require careful conservation oversight.

Objects Serving Cultural Functions

Historic sites identified as facilities that serve cultural functions are primarily museums of various types and facilities for public tours. Typically, these facilities are owned by the state or local government.

The management entity in such facilities is appointed and controlled by the owner. The way such facilities are managed is directed by the functions the facility is intended to perform. Therefore, the organizational structure of management entities and the qualifications of the people employed are usually adapted to the specific functions performed. In many cases, the professionals employed are qualified and have an understanding of historic preservation needs.

Managers of such sites generally have a budget from public funds that, to a basic extent, cover the costs of day-to-day maintenance of the site, personnel costs, and the costs of carrying out statutory activities. Funds for major conservation works must be obtained by the managers from the owner of the monument or from various public subsidies.

Additional funds in the budgets of such institutions (including those for conservation work) may come from revenues related to the basic activity (e.g. tickets from visitors) or other revenues related to the functioning of these institutions (e.g. room rental, advertising, sponsorship). The funds obtained in connection with the activities of such institutions depend on many factors - including the attractiveness of the facilities, location, attractiveness of the programme offer, volume of tourist traffic. In some facilities they may constitute a significant supplement to the budget, however, as a rule they are not sufficient to fully cover the costs of such institutions' functioning.

Implementation of cultural functions in historic buildings is generally an appropriate setting for these functions and is usually beneficial for the protection of the historic values of the facility. Managers demonstrate an understanding of preservation needs and the resulting constraints. Preservation needs are usually addressed in the manager's substantive and financial plans.

Sacral Objects.

Historic religious buildings make up a significant portion of the heritage collection. These are primarily churches of various denominations, monasteries, and accompanying buildings. Churches are often the main component of complexes of accompanying buildings that perform various functions resulting from the program of these institutions.

The continuation of religious functions is beneficial to maintaining the historical values of historic buildings. Modern interventions are usually limited to retrofitting the buildings with various types of fixtures and installations to ensure current utility standards.

Religious associations are the owners of religious buildings. These institutions appoint managers for individual buildings, who are generally clergy. Clergy do not have specialized training in the administration of historic buildings, but they usually appreciate the value of these objects. Especially since Catholic churches, for example, have a special status as places of liturgy, which further promotes respect for these places. The status of places of worship also generally motivates administrators and religious communities to keep these facilities in good repair. Within the structures of the Catholic Church in Poland, there are diocesan conservators who should assist in maintaining the historic values of religious buildings. Of course, these monuments are subject to all the regulations concerning historic buildings.

Sacral monuments are maintained from the budgets of church institutions. The budgets of individual parishes vary widely, of course. In the case of restoration work, parish priests usually ask parishioners to raise funds to pay for it. In the case of conservation work, managers of sacred monuments also have to apply for public subsidies.

In general, it can be concluded that the continuation of religious functions in religious buildings is beneficial for the protection of their historic values, as is their management by church institutions.

Residential Facilities.

A large group of historic buildings are those with a residential function. These structures range in scale from historic single-family homes, to residential residences of varying scales, to large townhouses in metropolitan centers. The group of buildings with residential functions also includes an increasing number of structures which formerly had other functions, but which are currently being adapted for residential use.

Generally, the continuation of the residential function in historic buildings which were built for this purpose is a good solution from the point of view of the protection of historic values. Housing standards are changing, but usually modern interventions can be limited to retrofitting buildings with modern installations and equipment. This allows to preserve the architectural form of historic buildings and valuable elements of architectural design.

Monuments adapted to residential functions are a separate problem. In case of buildings with large volumes (e.g. industrial buildings), the introduction of residential functions allows to preserve the architectural form and clarity of internal features, and at the same time provides modern use and funds for maintenance of these buildings.

Residential facilities are usually managed by their owners or managers acting on behalf of the residents. Managers of this group of buildings do not have the professional training to protect historic values. Their priority is to ensure appropriate utility standards, although in many cases they are concerned with protecting historic values. However, the monuments belonging to this group should be under the careful control of preservation services, as often their managers undertake unconsented interventions.

Funding for the maintenance of monuments serving as residential buildings comes from their owners or tenants. If these are buildings in which the owners live, their technical condition is a function of their financial possibilities. The condition of some buildings - mansions or palaces - may be very good, including costly conservatory repairs.

In the case of multi-family buildings, tenants' rents should cover maintenance costs, including repairs and conservation work. However, the situation is very different, especially in communal buildings, where a long-term renovation gap has developed. In such objects, larger maintenance works (e.g. façade renovations) require external subsidies.

Commercial Objects

Historic buildings defined as commercial buildings are buildings whose primary utility function is commercial in nature. The most common functions include food service, hotels, various services, and offices. These functions share a common goal of generating revenue to cover at least all of their operation and maintenance costs.

The scope of adaptation of historic buildings to the functions they perform varies greatly, depending on the original form of the building and the new functions introduced. The conservator's supervision, which usually agrees on such actions, ensures that the new functions should not drastically interfere with the historic values of the building. However, in practice the character and needs of these functions require many different transformations.

The form of ownership of such facilities varies; many of them - especially smaller facilities - are private, while in the case of larger facilities the owners may be business entities. Depending on the scale of the facility and the form of ownership, the manager is therefore a person or an appointed management entity. The management of such facilities is, in principle, to ensure the effective realization of the commercial function, therefore the structure of the management entity and the qualifications of the managers are subordinated to the realization of this function. The managers are therefore not competent to protect historic values.

The funds for maintenance of such objects come from the commercial activity. The financial plan of functioning of such objects assumes that the current maintenance - including works to keep the object in an appropriate technical condition - is covered by the activity. Costly conservation repairs may require external subsidies. In the case of a small group of prestige or highly utilitarian facilities, revenues from commercial operations may cover comprehensive renovations, including conservation work.

From a commercial standpoint, it may be advantageous to conduct business in historic buildings (despite preservation restrictions) because of their individual character, historical connotations, and identity. Usually, however, functional needs are prioritized by managers over preservation needs. Therefore, these objects require particularly careful, independent restoration supervision.

The separation of the presented groups of objects is indicative. First of all, it is aimed to show the differences resulting from the possible contemporary forms of use, which at the same time are connected with the specific scope of interference in monuments. This information is important from the point of view of monument management.

At the same time, the characteristics of particular groups of sites show the differences in the forms of use, drawing attention to other forms of ownership, management, and financing. This information is also very important for the manager. Of course, in practice, each of these aspects should be analyzed individually and it may turn out that the actual characteristics differ from those presented in the list.

## 2.3 Monument protection system

Protection of a historic monument should be treated as an element of the management process. However, the specificity and importance of these activities in the case of a historic building justifies their separate presentation.

Monument protection consists in preserving its historical form and substance, as well as maintaining them in appropriate technical condition. This is a difficult task as various processes destroying the monument take place all the time, and at the same time the technical and usage standards change. These phenomena concern all objects, they are natural and last all the time. Therefore, renovation of existing buildings and adapting them to new standards and needs is a common and fully justified practice.

Preserving an object in its historical form and limiting the possibility of adapting it to contemporary requirements is therefore an unnatural process and requires special organization. In practice, it is necessary for the conservation services to cooperate with the owners of historic buildings and to provide support, including legal, financial and organizational solutions. The protection system must combine all these elements and ensure their functioning. It is important and difficult because the owners, users and managers of historic buildings are primarily interested in their use for modern utility purposes. Protection of historic values is not their priority, and is often even treated as a costly impediment to the use of the site.

Limitations resulting from preservationist recommendations make it necessary to create a system that will support activities aimed at preservation of historic buildings and compensate for these limitations to some extent. Considering all the activities related to historic preservation, a complete system of historic preservation should include five elements necessary for this process:

- creation of legal foundations, which form the basis for the activities of the various stakeholders in the preservation process (the law limits the freedom of action of monument owners, defines their obligations, and gives powers to the preservation services)
- establishment of conservation services which exercise professional supervision over the protection of historic monuments (state and local government services)
- determining the value of the monument, its material representation and the manner of its protection (specialist activities carried out by the conservation services)
- support compensating for the additional difficulties and costs connected with the conservation works (the conservation requirements and works are an additional burden for the monument owners - they should be subsidized to some extent)
- provision of professional consultancy to support the planning of conservation works and the use of the historic building, respecting the protection of historic values (this activity is carried out by specialists, in agreement with the conservation services)

Fulfillment of the listed conditions allows to conclude that there is a system enabling preservation of historic monuments. The manager of a historical site should recognize each of these elements in the environment of his activity, as they create the framework and possibilities of his work.

<u>In practice, however, the activities for the protection of monuments are classified taking into account the relationship between the monument and the entity that performs certain activities at it.</u> Due to the nature of the relationship, two areas are distinguished - care of monuments and protection of the monument. The specificity of

these areas justifies their separate presentation, in accordance with the delineation introduced even in the title of the *Polish Act on Monument Protection and Care of 2003*.

The system of historic monument care consists of activities directly performed on the buildings, primarily by the entities directly involved with them - owners, users and managers. Of course, the status of these entities may vary - they may be individuals, local governments, the state, companies or institutions. The key features that distinguish *care* from *protection* are the direct involvement, relation to the monument, and action. *Protection* involves indirect actions, which create conditions for proper management of the historic monument, whereas *care* involves direct actions, which are mainly related to material activities at the monument.

The difference between *protection* and *care* is also related to the qualifications of the people who carry out these activities. Protection, i.e. creating conditions for proper handling of historic monuments, is carried out by specialists in the field of conservation and heritage studies. Care, on the other hand, is provided by the owners or users of the historic monuments, who most often do not know anything about monument preservation and therefore need professional support (protection).

The care of a monument is therefore in practice related to its contemporary maintenance and use. Therefore, it will be characterized in a separate subsection discussing the use of a historic monument.

The first element of the historic monuments' protection system are all the laws under which the system operates. The most important is the law enacted at the national level. The pillar of the entire legal system concerning historic monuments is the act passed by the Parliament, which is the legal act of the highest rank. In Poland it is the *Act on the Protection and Care of Historical Monuments* passed by the Polish Parliament in 2003 (Journal of Laws 162/03, item 1568, as amended).

The Act is a comprehensive document, which in over 150 articles defines the key issues related to the protection of historic monuments. The articles are grouped into 13 chapters, corresponding to important aspects of the historic preservation system. A brief description of the key chapters is warranted to highlight the most important issues in monument protection.

Chapter I is a kind of introduction to the Act and provides an explanation of key terms and concepts. This is much needed, both in terms of the many terms that define different types of monuments and the definitions that define the scope of activities performed on monuments. This chapter also defines the areas of activities assigned to the term protection and care.

Chapter II defines the forms and means of historic monument protection. These provisions define the forms of monument protection, i.e. specific tools that serve to protect historical buildings and areas. In Polish system the forms of protection are: entry in the *register* of historic monuments, entry in the List of Treasures of Heritage, recognition as a monument of history, establishment of a cultural park and arrangements in the local spatial development plan. In particular articles the rules of using these forms are described, the most comprehensively presenting the entry of an object in the so-called *register of monuments*. The chapter also includes the articles concerning the creation of the so-called monument *inventories*, i.e. forms of identification and documentation of monuments, which cover the largest part of the national heritage resources.

Chapter III deals with the management, research and works on historical monuments. First of all, it sets forth the formal rules of undertaking various types of activities that may transform historical monuments. It also specifies the powers of the preservation services, including those related to inspections and permits for works on historical monuments. The regulations even specify the qualifications of the people who can carry out works on historical monuments.

Chapter IV deals with preservation supervision. The individual articles define the procedures and powers of the Voivodeship Historic Preservation Officer with respect to the supervision of works carried out on historical buildings. It is clear from these provisions that the Voivodeship Historic Preservation Officer has the authority to supervise and inspect all the work, starting from obtaining building permits until the work is completed.

Subsequent chapters of the act deal with other aspects of dealing with historical buildings, including the provisions regarding the organization of conservation services or movable monuments. There are also issues that are important to the managers of immovable monuments, such as financing the works (Chapter VII) or penalties (Chapter XI).

Therefore, the Act is a document that comprehensively defines the framework for handling historic buildings. The manager of a monument should become familiar with it in order to understand the limitations and obligations which they are subject to and the support options available to them.

A very important provision of the Act defines the so-called forms of historic site protection (art.7). Roughly speaking, these are the forms in which historic buildings and sites are given a certain status and are covered by a set of regulations designed to protect their value. Each of these forms operates under specific regulations, enacted at the national or local level. This makes it possible to differentiate these forms of protection.

Based on national regulations, there are two forms of protection of historical buildings - entry in the register of historical buildings and recognition as a monument of history. *Register entry* is the basic form of protection used in the Polish system. The historic site is entered in the register by the Voivodeship (Provincial) Conservator of Monuments. On this basis, the object acquires the status of a historic monument and comes under the conservator's jurisdiction. In Poland, there are over 70,000 objects and areas registered with Voivodeship (Provincial) Conservators of Monuments.

The second form of protection created at the national level is recognition as a *monument of history*. The status of a monument of history is granted only to monuments of the highest value, by decree of the President of the Republic of Poland. A monument may only be a building already entered in the register of historic monuments and therefore already covered by conservator's protection. Therefore, recognition as a monument of history does not entail additional forms of protection. There are 108 monuments with this status (as of the end of 2020).

The law also provides for the possibility of creating forms of protection at the local level. Local created regulations can be adapted to the specifics of a particular monument and the context in which it functions.

The local government may first of all introduce into the local law, which is the *local spatial development plan*, provisions which regulate investment activities in the area. In this planning document, by virtue of arrangements with the Voivodeship Conservator of Historical Monuments, it is possible to introduce provisions for the protection of historical values. This instrument is primarily applicable to modern investments carried out in the areas under conservation protection.

The second local form of protection is a *cultural park*. It is also a form, which can be created by a local government unit, based on a resolution. In consultation with the

Voivodeship Conservator of Historical Monuments, the local government defines the area of the cultural park and its regulations. This formula, therefore, allows for truly individual development of regulations that protect the heritage without blocking development in the area.

At the local level, apart from the above-mentioned forms of protection, it is also possible to use such instruments as the *inventory of historical monuments* and the *Municipal Historic Monument Care Program*. Both instruments are obligatory, but the local governments are free to develop them. This makes it possible to shape the local policy on monument conservation with their help.

All the national and local regulations regarding the protection of historic monuments obviously influence the actions taken by the administrators. Therefore, the manager of a historic site should first of all check which regulations apply to the site. He or she is obligated to comply with the applicable regulations. However, on the other hand, these regulations can be used by the manager to support his activities. For example, he can use conservation guidelines or obtain public funds for conservation works.

The second element which forms the area defined as the *historic monument protection* is the conservator's service. In the Polish legal system, the powers to protect historic monuments are vested in the state conservation service, which operates in the form of Voivodeship Monument Protection Offices. These offices operate within the structure of the state administration - they are part of the Voivodeship Offices.

The scope of authority of the Voivodeship Conservator of Historic Monuments is defined by the Act on the Protection and Care of Historical Monuments and can be characterized as follows:

- issuing various types of permits related to the conduct of research, works on the monument and its surroundings, functional changes, installation of technical elements on the monument and any other actions that may affect its form
- conducting inspections in terms of the implementation of the provisions on monument protection and issuing the resulting recommendations
- issuing decisions to stop any kind of renovation, maintenance, construction, archaeological works performed on the monument and its surroundings, if they pose a risk to its value

- issuing decisions ordering the execution of specific works that are necessary to protect the value of the monument, including the decision to restore the monument to its original condition
- supervision of the proper conservation, restoration, construction works and other activities on the monuments, as well as archaeological research
- keeping registers of monuments and provincial records of monuments.

Another instrument at the disposal of the Voivodeship Conservator of Historic Monuments are the powers to agree on various documents affecting the situation of historic buildings. These include, among others, approval of local spatial development plans, opinion on local government historic buildings care programs (obligatory documents under Polish law), opinion on the studies of conditions and directions of the spatial development of communes.

Another instrument are the financial means which the Voivodeship Conservator of Historical Monuments may use to support the activities aimed at protecting historical monuments. The budgets available to the Conservator vary greatly; however, such an instrument of direct support also exists.

The powers and instruments available to the state conservation service indicate that the conservator formally has full control over the activities carried out on historic buildings. Therefore, the manager of the monument should consult with the service and obtain its approval for all works interfering with the historic form and substance of the protected structure.

Apart from the state services, there are also local government services in Poland. These services may be established by local government units, which cover the costs of their activities. The powers of these services are granted by agreement with the Voivodeship Conservators of Monuments, who define their scope. Thus, the authority of local government services is part of the powers that the state service will delegate. Local government conservation services are created primarily in larger historic towns that have the resources to maintain them and monuments whose number and value justify the creation of such services.

### 2.3.1 Stakeholders in the monument management process

In the complex process of historic monument protection, management and use, a very important element are the so-called stakeholders, i.e. all individual, institutional and group participants in the process. It may seem obvious to state that the participants in the process of historic preservation and management have an impact on it, but it has a deeper meaning.

In historic preservation, which developed over many decades, the primary focus was on protecting the value of the historic site. A historic monument was treated as a valuable work of art and a historical document whose value justified seeing it as an object of protection. The primary goal was to protect a monument, the forms of which were decided mainly by specialists. It was assumed that the utility functions of the monument should be adjusted to the needs of protecting its value. Therefore, the monument's functions and the circle of decision makers were very limited.

A very significant increase in the number of monuments, their material functions and intangible meanings caused a change in the traditional approach to the understanding of a monument and its protection. Over the last decades, it has been recognized that the owners, users, and recipients of monuments are equally important as the latter. This approach has been confirmed in many formal documents - the so-called doctrinal texts, which are the commonly accepted form of shaping and expressing contemporary conservation theory. Recognition of the role and position of stakeholders in deciding about the forms of protection and use of historic buildings is so great that a new approach hes been developed i.e. *people-centred approach* to historic buildings . This means that analysis of stakeholders' needs, opinions, and opportunities for action is an absolutely critical component of the historic preservation management process.

For most monuments, especially those of higher value or more complexity (historic complexes or towns), there are many stakeholder groups that participate in or influence their management.  Listing all stakeholders would be difficult, especially since the causal contribution of each group/person is different in each case. Therefore, <u>in each case it is necessary to perform an analysis and identify key stakeholders individually, determine their needs and opportunities for action.</u> Nevertheless, taking into account the specificity of dealing with historic monuments, we can distinguish three main groups of stakeholders from whom we need to gather information and with whom we need to cooperate while managing the monument.

The first group of stakeholders consists of owners and managers of the historic property. The key feature that unites these stakeholders is their power over the monument. Their right to the monument, and therefore to make significant interventions in it, results from the ownership title (owners of monuments) or from the authority granted by the owner (managers of monuments).

The legal status of the stakeholders forming this group can vary greatly. They can be individuals, institutions, companies, local government, or the state. The only important thing is the right to dispose of the monument and, of course, the responsibility for the monument resulting from this right.

From the point of view of monument management and protection, the responsibilities of these stakeholders are crucial. Having the right of ownership of the monument, they are responsible for its administration, including its financing. They are also responsible for the technical condition of the monument, including the maintenance of its historic values. They can be held accountable for these tasks.

They are responsible for the monuments and preservation and values, although they usually do not have expertise in this area - therefore they need support in this regard.

This group of stakeholders is relatively small.

The second group of stakeholders consists of people and institutions responsible for and shaping the conservation of a historic property. In practice, these are various offices dedicated to the preservation of historic buildings, especially the Provincial Conservator of Historical Monuments, the Local Government Conservator of Historical Monuments, and the Cultural Park Management. These institutions have, first of all, various powers of control and decision-making with respect to monuments (protection), but also certain possibilities of action (care). The organization, size and budgets of these institutions vary, which determines their activity. These institutions operate on a different scale - urban, regional, national and even international (monuments included in the UNESCO list). The preservation systems created by these stakeholders overlap and complement each other. However, their institutional nature means that the powers of these stakeholders are defined by law, which quite clearly defines their position. Undoubtedly, the most important position in the Polish system of historic site protection is held by the Voivodeship Conservator of Historic Monuments.

This group of stakeholders also includes the entities which can make laws or enact documents that regulate the handling of historic buildings. In practice, these are the local government units (e.g. the City Councils), which constitute the local documents regulating the construction activity (e.g. local spatial development plans). These instruments also include communal monument care programs and communal monument registers.

The third group of stakeholders consists of the broadly understood users of the historic property/area. These are primarily the following groups: residents who live in the vicinity of the monument; local consumers who use the utilitarian functions of the monument (cultural, commercial, religious); providers who create the utilitarian function of the monument (hoteliers, shopkeepers, offices, museum workers); tourists.

Stakeholders included in this group only use the monument, but do not take actions that significantly transform the monument. The small range of possible actions taken by this group of users is primarily due to their limited rights to the monument. The scope of their actions in relation to the monument is determined by the terms of the lease agreement, not by their ownership rights. Also, for financial reasons (short-term investments), the interventions of these stakeholders are limited to adaptation rather than permanent conversion.

However, the needs and opinions of this group are very important and should be met, as their lack of satisfaction results in the inability of the property to function and simply be maintained. And this is by far the largest stakeholder group. If the needs or tastes of this group of users are not recognized and satisfied, their use of the monument will decline. In a competitive marketplace, this means missing out on the resources that came from using monuments. This means that most of the stakeholders in group one will not have the resources to maintain and protect historic buildings.

Modern conservation doctrine, however, assumes that commercial considerations are not the only important factors in determining the position of this stakeholder group. It is also believed that historic buildings are important for the identity of local communities, their cohesiveness, and the creation of pro-social attitudes. For these reasons too, the opinions and participation of this stakeholder group - local communities and users - should be taken into account in dealing with historic buildings to the greatest extent possible.

In the case of any historic building, the stakeholders who actively influence its condition and those who are potentially interested in it can be generally assigned to one of the groups mentioned above. In practice, however, a more precise identification and characterization of all the key actors is necessary. The identification should also include the determination of the possibilities of their action, range of interests (goals). In other words, it is necessary to determine who is interested or obligated to act at the monument, what are their possibilities of action and what are their goals.

## 2.4. Use of a monument and its historical values

Taking into account the specificity of the monuments (possibilities and limitations), the ways of their use can be divided into two basic groups - those based on historic values and those not based on historic values. The basis of this division is the form of use and treatment of historic values represented by the monument. This means, of course, that the "quality" or "attractiveness" of a monument's historic values may be the determining factor in determining its form of use. If they are significant and distinguish the monument, its use may be based on them, and purely utilitarian functions may be auxiliary or even absent.

Assuming the above, two forms of historic site use and the resulting activities can be distinguished.

### 2.4.1 Forms of monument use based on historic values

<u>The first group consists of forms of use that utilize or even rely on significant historic values (in monuments with such values), and the activities that serve this purpose are presenting, making available, and disseminating (promoting) the monuments.</u>

Thus, the first group consists of uses in which historic values expand the use potential of the site. The historic values, i.e. the features of a building as a work of architecture or construction, constitute additional value complementing its basic utility functions. The relationship between historic values and functional uses may vary depending on the characteristics of the building and over time. At one extreme are buildings where the primary function is purely utilitarian and the historic values are complementary, additionally expanding their attractiveness (as a place where these functions are realized). At the other extreme are buildings where the historic values are so significant that the utilitarian function is based on them (e.g. touring, museum, representative office). In practice there are of course most compromise solutions, i.e. combining purely utilitarian functions with various functions based on historic values to varying degrees.

In simple terms, the following forms of activities carried out on historic buildings in order to utilize them based on historic values can be identified

<u>Presentation:</u> This is a wide range of activities designed to show and distinguish the historic values of a building. The simplest form of presentation is the façade of a historic building, which can be viewed by any passerby. This form does not require any additional actions on the part of the building manager, however its obvious condition is the preservation of the historic facade. However, if several layers of the old architectural decoration are exposed on the façade and protected in a way that makes it possible to see them, it is already an intentional action serving presentation. For example, uncovering and securing historic polychromes on the walls or ceilings or digging up and securing archaeological relics is also a presentation.

Presentation is often an effect of activities related to uncovering and securing historic elements of a monument - it is not the aim of the works undertaken but an opportunity created by these works. Of course, proper presentation - accessible and legible - requires complementary and protective works that go beyond conservation work. However, the displaying and distinguishing historic elements is also an important goal of conservation efforts, so additional work to present the monument (elements) should be considered standard.

Presentation is not limited to showing already existing historic features. Often the historic elements located in a given place are supplemented with the historic elements brought from other places or reconstructed nowadays. This activity is fully justified, as it allows to show historical objects in a more comprehensible way, gather them in accessible places and is simply more attractive.

As a form of presentation should also be treated all historical interiors that are left, protected and treated as a kind of exhibits. In such interiors only the architectural decoration can be presented, but also their historical equipment. Therefore, the form of presentation are, for example, historic interiors of churches, town hall halls, interiors of tenement houses, stores, schools and monasteries. A form of presentation is also the interior of museums, which are located in historic buildings. The exhibits in such museums may complement these presentations.

The indispensable element of the presentation of historic values is supplementing and explaining them with information transmitted in different forms. Graphic design, descriptions, comments, markings - these are the elements added nowadays that should be treated as a necessary complement of the presentation of the monument and its value. These forms are connected by their direct location at the monument they inform about. At the same time, it is the feature that allows to distinguish them from the information and activities included in dissemination.

<u>Making available:</u> These are various activities designed to ensure accessibility to a monument, i.e., the possibility of reaching and seeing what is the result of activities called "presentation". The activities covered by the term "presentation" are not the same as "making available". This is the case only with public spaces and objects. Without planned management activities, the facades of historical buildings, so-called urban interiors (panoramas of public spaces - streets or squares) and interiors of some public buildings (churches, offices, etc.) are made available.

Many viewers and users of historic monuments find such external access sufficient and may consider it satisfactory. In this case, scale is important. In the old town complex, the residents and tourists are surrounded by historic buildings whose forms, different from the modern buildings, create a specific scale, atmosphere, and identity. Historical architecture and urban planning create a specific scenography in which various services and attractions are offered. They can be located outside in the urban space, and inside the buildings. For many visitors this combination of services and attractions in attractive scenery makes this form of presentation of monuments sufficient.

The situation is different on a smaller scale - a single monument or a small complex. In this case, external access is generally insufficient. The visitors want to see something more. Therefore, fuller utilization of historic values requires creating an opportunity to see historic interiors, which of course requires their preparation for presentation. For reasons of order alone, such access requires a number of management measures, including access control, security, accompanying services, ensuring safety standards, fees, and guides.

The multitude of functions and conditions that are associated with the public use of historic interiors makes the organization of their accessibility a serious management task. It certainly involves costs, but at the same time, if properly organized, it can also be a source of profit. This is one of the reasons why making historic buildings accessible is a form of their use (basic or extending) and should be properly organized and managed.

Of course, the conditions of providing access to a historic site are similar also when it is a part of a larger old town complex. In this case, however, visitors may also be interested in a place of lesser historic value, because they are already on site using the made available old-town complex. On the other hand, in such an ensemble, the historic sites have to compete with many other attractions located nearby, which may reduce the interest in the sites.

Dissemination is a series of activities aimed at spreading the information about the values of historic buildings, their presentation and availability. In other words, it is the widest possible distribution of information on the use of heritage items based on their historic values. Thus, it is the promotion of a historic site/complex as a place where various functions are performed, but with particular emphasis on the functions based on historic values.

The forms of promotion can be very different, the creativity of managers in this area is inexhaustible. For example, leaflets, advertising boards and banners are used directly on site at the historic site. On a larger scale, these can be guides, tourist information offices, maps with attractive objects marked, brochures, etc. Outside the object or historical area - without material connection with the place - forms of dissemination include websites, tourist guides, promotional films, advertisements, sponsored articles.

Forms of dissemination are usually related to the scale of the object/complex, which determines the possibilities of its managers. The possibilities of traditional dissemination activities of a manager of a single monument are incommensurate with the possibilities of the city government. Therefore, the city government has special obligations in this regard. However, nowadays, the Internet and social media create great opportunities also for managers who do not have large budgets and teams of employees. This greatly expands the possibilities of disseminating information even about individual monuments, whose managers are able to use these forms of communication and promotion.

Dissemination, which is intended to propagate information about opportunities to learn about a monument's value, is in practice intended to encourage people to visit the monument and take advantage of its utilitarian features. However, historic values alone may not usually provide sufficient incentive to visit a monument, especially when doing so requires undertaking a journey. Only the most iconic monuments-which are few in number-are so attractive that visitors undertake the journey even from remote locations. At most monuments and complexes, the information disseminated about historic values must be accompanied by information about other attractions and services. These are, for example, information about accommodation, culinary offer, shopping opportunities, regional products, transportation possibilities or other attractions of different nature. Due to the variety of needs, interests, and possibilities of the recipients, expanding the offer in all those areas is very important and determines the attractiveness of the place. Therefore, the most visitors may be attracted to old-town complexes, where the sum of offers and information describing them gives a synergetic effect.

In historic complexes, especially in urban areas, utility functions must be dominant and not only based on historic values. Therefore, in the wide stream of information disseminated about these complexes, information regarding historic values and uses based primarily on those values constitutes only a certain part. In many cases, information about other values and services may dominate or even drown out that about historic buildings. This will usually be the case given the number and involvement of non-historic providers and audience needs. However, historic area managers should respond to such a phenomenon by consciously shaping outgoing content about the historic area, shaping its image and consequently its visitor profile. It seems that this aspect has not been appreciated so far by the managers of various historic areas and has led to undesirable phenomena (e.g. Cracow).

Taken together, these three groups of activities should be considered as related to and serving the broadly understood use of historic buildings based on their historic values. Their common feature is the support, or at least significant consideration, of historic values represented by historic buildings and complexes. In fact, the only use in the full sense of the word is making a monument accessible. Presentation is the preparation of the object to be used (made available), whereas popularization is to inform about the possibilities of use. However, in practice, providing access to the site cannot do without both activities. Moreover, each of these activities generates costs for administrators, labor needs, and income for the people and companies who perform them. Therefore, from the perspective of the overall management of a monument/complex, they should be viewed together.

On the other hand, separate analysis of the three groups of activities related to the use of a historic building is justified. In practice, these are activities of a different nature, undertaken by different specialists, requiring different qualifications, implemented with different budgets, carried out at different times. Separation of these activities on the analytical level allows to assess whether they are carried out to the appropriate extent. It is important because the lack of balance between them threatens the protection of historic values.

A good illustration of the close and necessary relationship between the three groups of activities is the exhibition organized under the Cracow Market Square. First, the relics of historical buildings were unearthed, examined, secured, and properly exhibited under the modern surface of the square - this is the presentation. Then an institution responsible for maintaining the exhibition and serving visitors was organized - this is access. Since then, a campaign has been carried out using various means to inform people about the value of this monument and the possibilities of visiting it - this is dissemination. All these activities were necessary to use the relics preserved under the surface of the Cracow market square.

## 2.5. Forms of monument use based on the functional potential

<u>The second group consists of forms of use that exploit the functional potential of a building (such as a monument) or an urban complex (such as a historic complex), but in a way that respects and adapts (protects) its historic values. The activities that serve this purpose include monument adaptation, expansion/addition in monuments, and construction of new buildings.</u>

According to modern conservation doctrine, historic buildings and complexes should serve the public and function according to its needs. Individual historic buildings, and especially historic complexes, must enable their owners and users to live and function on a sustainable economic basis. However, contemporary functions and standards are different than in the past. This means the necessity of adapting the monuments to the current requirements, i.e. making interventions that interfere with and transform their historical form and substance. The joint task of managers and conservators is to determine the compromise forms of functioning and development that meet the contemporary needs and at the same time do not exceed the limits beyond which the loss of historic values occurs.

Finding solutions of compromise is not easy. On the one hand, conservators must precisely define the objects, elements, or features that are crucial from the point of view of historic values and therefore must be preserved. Thus, indicating the limits to which interventions and transformations are possible. Managers, on the other hand, must fit within these boundaries, that is, limit and adjust their plans and activities that interfere with historic buildings and spaces.

The diversity of monuments and management conditions means that there are no universal forms of monument use. This applies to both the preservation and use aspects. On the preservation side, there is a refusal to define universal forms of action at monuments. There is no definition of the scope of permitted preservation procedures, which would thus define the permissible limits of intervention in monuments (in the traditional approach to monument preservation, the limits of permitted activities in historic buildings were "conservation" and "restoration", procedures defined in the sense presented in the Venice Charter - 1964). Preservationists recognize that the range of interventions can be broad as long as the preservation of historic values permits. From a use perspective, it is also difficult to identify universal functions that will always resonate with preservation needs. A case-by-case analysis must be made, juxtaposing use needs and conservation requirements.

In practice, however, there are limits that are clear even without a detailed analysis. This applies to both the scale of the site and the complex. On the scale of a building, radical transformations of the shape, materials, colors, details, and interiors are generally unacceptable. At the scale of the complex, it is unacceptable to liquidate a larger number of objects and to transform the spatial layout. On the other hand, new additions should be adjusted to the historical surroundings - for example a skyscraper, a shopping mall, a sports facility, an entertainment hall, or a new park should not be built in a historical complex. The principles of conservational interference (not to be confused with the forms of conservational activities), both at the scale of an object and a complex, are accepted and universal.

Despite the indicated restrictions, the range of possible and acceptable activities related to the use of historic buildings and complexes is still quite large. However, analyzing these functions does not only make sense in the context of their influence on the protection of historic values. It is possible because it is possible to assume a relation between a function and necessary transformations of a monument. From this perspective, it is possible to identify three groups of activities (interventions) that may be necessary for different forms of use.

Historic monument adaptation is the process of adjusting a historic building to its present-day functions. Adaptation is not, therefore, a term defining the conservation activities with a defined scope, but a broad concept covering various works aimed at adapting a monument to new utility functions.

The form and detailed solutions of constructed buildings are determined by the specific requirements of their functions. Therefore, the introduction of new functions to the existing buildings (monuments) generally requires the adaptation of the building to the standards of the given function. In practice, the necessary scope of adaptation of a historic building can be large and include many aspects - construction, spatial solutions, equipment, materials, installations, general standard, stylistics. The scope of changes depends on the specifics of the new function and the characteristics of the historic building. However, in most cases the adaptation requires deep interventions that significantly transform the existing form and substance of the building.

The scope of changes in the first row is dictated by the needs and standards of the introduced function. The changes accompanying adaptation to new functions are obvious - for example a residential facility is changed into office, service or commercial space. However, the continuation of the function also often requires adaptation of the monument resulting from the change in standards - for example, contemporary apartments, stores, or restaurants require different spatial solutions, equipment, or finishes than in the past. To some extent it concerns even seemingly unchangeable and similarly realized functions, as in the case of sacral buildings, where the spatial solutions may be completely preserved, but new standards and installations in the field of heating, lighting, security, sound system, ventilation, etc. are introduced. This type of work involving changes in standards, equipment, installations, materials is referred to as modernization. Modernization is thus an integral part of adaptation and almost always accompanies the contemporary use of monuments.

An important characteristic of adaptation, which distinguishes it from other activities, is its limited spatial scope. Generally, adaptation consists in adjusting a monument to a new function, but within the scope limited to its spatial possibilities. Thus, the activity consists in adapting a historic space to new utility needs. Adaptation usually requires certain transformation of the existing space, however, without disturbing the body of the historic building; as a rule, it does not require its transformation (extension, superstructure). Therefore, the character and scope of new functions introduced to the monument must be limited and adjusted to its potential. It must be emphasized that not every new function can be introduced to every monument.

From the conservator's point of view, as in the case of all interventions in historic buildings, the key issue is to minimize the destruction of historic values. Therefore, the principle should be to adapt the contemporary function to the usable potential of the monument. It may be concluded that the better the selected new utility function, the smaller the extent of necessary interference (and thus adaptation).

Adaptation can also be carried out on a spatial scale. Historic complexes also need to be adapted to modern utility functions through various activities. For example, change of traffic organization, creation of parking spaces, introduction of public transport, replacement and supplementation of installations, adding the so-called small architecture, trash garbage cans, surfaces, lighting - all these activities are included in the concept of adaptation combined with modernization. As in the case of individual monuments, the limit of adaptation is the one that does not disturb the spatial layout of the historic complex.

Taking into account the above limitations, it can be concluded that both on the scale of the historic building and the complex, adaptation consists of activities that enable the use of the monument, but do not exceed the limit of protection of historic values.

Extension of monuments - these are activities consisting of addition, superstructure or other change in the form of the monument, as a rule undertaken in order to utilize it. The basis for distinguishing between extension and adaptation is the extent of interference - in the latter case the transformations include also the form of the building.

Extension is usually undertaken when the current or planned utility program cannot be realized within the existing volume of the monument. Therefore, managers take actions aimed at creating additional space. In some cases it can be created by extending the building with underground storeys - the usability of such surfaces is however limited to auxiliary or household functions. The advantage of such solution is not interfering with the form of the building above the ground level, but the undeniable limitation is the high cost of such works. That is why this type of realizations are not common, most often they are connected with creation of underground garages, for which there is absolutely no place in historical districts.

More often undertaken solution is on the other hand superstructure of monuments. It is a procedure which does not require occupation of area outside the contour of the existing building, which often would not be possible, especially in historic districts with usually high intensity of development. Superstructure may also be less expensive than the extension of the building, because it does not require earthworks, foundations, insulation, etc. Superstructure may consist in raising a building by one or more stories and covering it with a roof of reconstructed or modified shape. A special case of superstructure is the transformation of a historic building above the level of the highest cornice. The roof is sometimes transformed, extended to even several levels, always additional windows are inserted. Such procedure is most often performed when regulations do not allow to disturb the level of the highest cornice. There is no doubt that all superstructures violate historical form of the building and interfere with its historic values. Therefore, such actions can be undertaken only in monuments of lesser value, which are important as an element co-creating the historical urban layout.

Another form of monument extension is adding new elements to it. Similarly as in the case of the superstructure, the purpose of the action is to obtain additional usable areas. Extensions have very different scales and forms, which are limited by the size of the plot and the needs and possibilities of the investor. Therefore, there are examples of extensions only slightly increasing the volume of the whole complex, as well as extensions even several times bigger than the monument, in which they were built. Therefore, it is difficult to formulate a common conservator's evaluation of all such actions; in some cases they are almost neutral, and in some they destroy the monument in a caricatured way.

An extreme form of development is the transformation of the historic form of a building. Such actions also occur, but as a rule they should not be considered as a form of dealing with historic buildings. Their effect is the destruction of the value of the historic building. However, such actions may happen when the historic object has absolutely minimal value and its managers are fulfilling utility needs. However, after such transformation, the object should lose its protected monument status.

All of the mentioned forms of activity serve to obtain additional space extending the usability of the historic monument by continuing or introducing new functions. Therefore, they are used in practice, although undoubtedly they lead to diminishing historic values of the objects.

Construction of new objects - these are activities undertaken in historic complexes/districts in order to realize various functional uses. In historic areas, historic architecture and spatial layout have historic value - these two elements are subject to protection. However, larger complexes (urban areas) do not consist only of buildings of historic value or not only of significant historic value. Therefore, some objects are not subject to protection and can be replaced by new buildings. New buildings can also be created on undeveloped land, which always exists, as no area is completely covered by buildings.

New buildings themselves are not subject to conservator's control, however, in historic areas their location may disturb the historic value of the spatial system, and their form may have a negative influence on the overall value of the architectural complex. Therefore, both the location and form of new buildings in historic complexes and areas should be subject to conservator's control.

The condition of protecting the values of the historic spatial systems is preserving their authenticity and integrity. New buildings developing the so far free areas may violate these parameters. Therefore, from this point of view, the construction of new buildings should be conditioned by an analysis of its impact on the historic values of the complex.

The second problem associated with new buildings in the historic space is their form. The conservation theory states that new buildings should not copy historical forms; this would be falsifying authentic monuments. On the other hand, it is not advisable to build extravagant forms which excessively contrast with the historical surroundings - new objects should be distinguishable, but they should respect the urban and architectural context. These two poles - copies and extravagant forms, mark a vast area in which architects can show their creativity. One of the directions of activity in this trend is the so-called retroversion, i.e. designing contemporary versions of historical buildings (FOT).

In order to preserve the historic values of historic complexes, conservators introduce additional restrictions regulating new construction. The regulations may concern for example building height, building line, roof shape, materials, colors, architectural details, functional divisions. Such regulations limit the freedom of creating new buildings, preventing their excessive dissimilarity against the background of the historic environment. It is assumed that this strengthens protection of historic values.

A separate group of activities, which has a similarly large technical scope as the construction of new buildings, is the so-called facadism. This procedure is most often applied in frontages of tenement houses and is carried out in buildings of low historic value. It consists in leaving only the façade of the building, demolishing everything besides it, and constructing a new building. The only preserved element is the façade, the object behind it is completely modern, so it can meet all utility standards. For this reason, such action is willingly undertaken by managers, but should be used only exceptionally.

Yet another case is the reconstruction of destroyed monuments. Monuments are destroyed in equal parts intentional and accidental circumstances-war, earthquake, fire, flood, building disaster. Traditional preservation theory has not recognized reconstruction as a valid preservation action, and has consistently failed to recognize the value of such a monument. Nowadays, however, reconstruction of damaged monuments is permitted, but it must be based on reliable sources.

Summarizing the three groups of activities interfering with historical buildings and complexes in order to fulfill their utility needs, they can be generally evaluated from the conservator's point of view. In simplification, they can be attributed to different degrees of interference in historic environments, thus different degrees of destruction of historic values. Adaptation is the least invasive, while extensions are more invasive, also transforming the mass of the buildings. However, it is more difficult to make an unambiguous assessment of the construction of new buildings in historic complexes. Each case requires individual assessment. Some projects may not interfere much with historic values, while some may be very devastating. Therefore, it is very important to follow universal conservation principles.

*A CASE STUDY - POLISH MANAGEMENT*

## The Castle Complex in Janowiec

**Developed by Anna Fortuna-Marek**

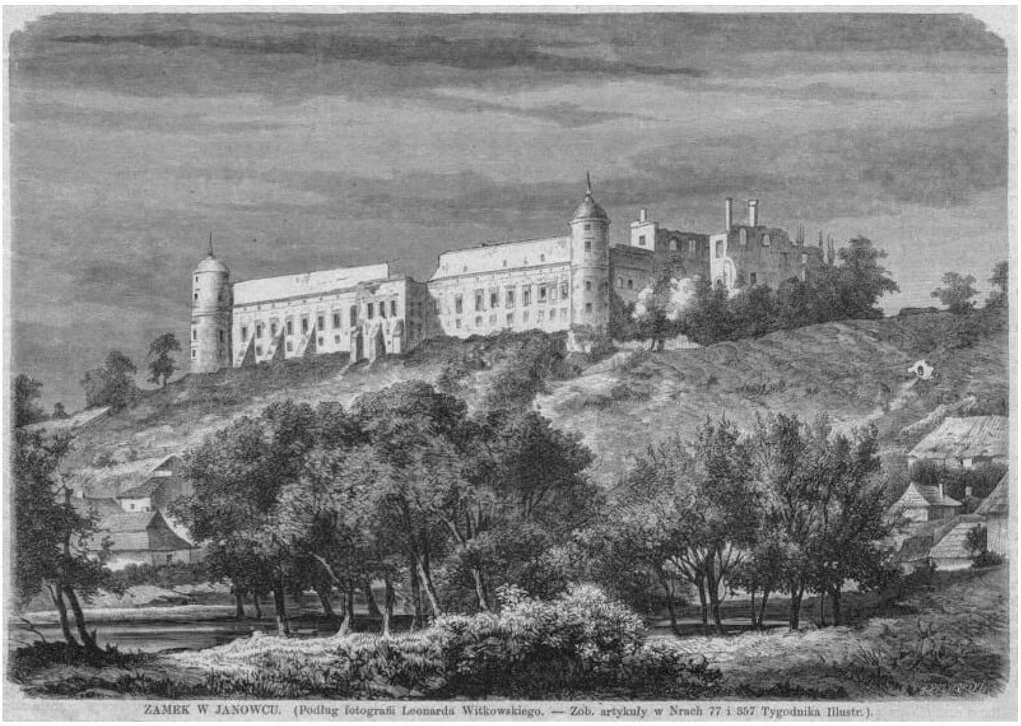
## General

The castle complex in Janowiec is located in Lubelskie province (Puławy county, Janowiec commune). The historic complex consists of historic ruins of a castle, park, and a set of wooden manor buildings and farm buildings that form a small open-air museum.

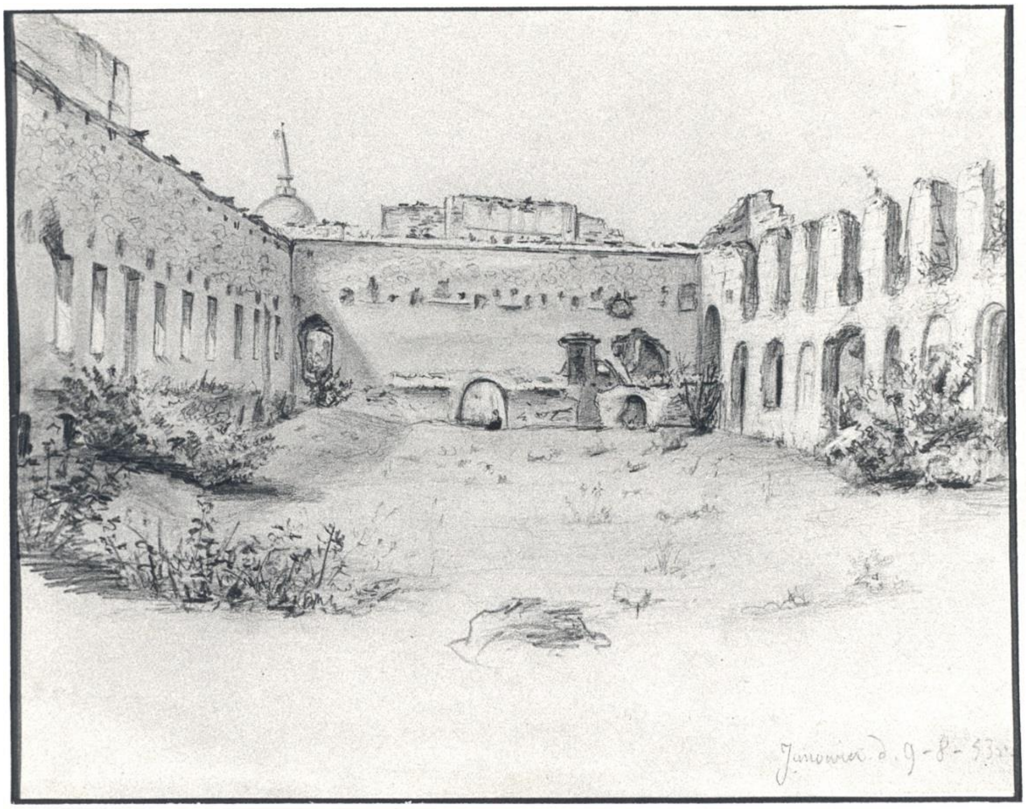
The castle, built at the end of the 15th century or after 1508, belonged for several centuries to wealthy Polish families: Firlej, Tarło and Lubomirski. After the death of Mikołaj Firlej, the starost of Kazimierz, the construction in the bastion system was continued for his son Piotr, the voivode of Ruś. At that time a fortress was built which was adapted to the use of firearms and cannons, inspired by the military architecture of Italy. In 1537 Sigismund I the Old (Zygmunt Stary) issued a foundation charter for Janowiec, a town located by the already existing castle. In the years 1565-85 the castle was rebuilt in the spirit of Mannerism. According to the design by Santi Gucci, the south wing, the so-called palace, was built for Andrzej Firlej. The castle was then given a residential character, with attics, arcaded galleries and Mannerist decorations. At the beginning of the seventeenth century, the castle passed into the hands of the Tarło family, and was again extended by the addition of a residential wing and towers: the western and eastern one. In 1656 it was burned during the Swedish Deluge, and then rebuilt as a Baroque residence for the Lubomirski family. Tylman van Gameren probably took part in the works. At the end of the 18th century the building was modernized and decorated with Rococo ornaments. In 1783 Marcin Lubomirski sold the castle to Mikołaj Piaskowski. After his death in 1803, the building fell into ruin. In the years 1931-1975, the castle belonged to engineer Leon Kozłowski, who made attempts to save it by carrying out minor repairs. However, in 1975 he sold the castle to the State Treasury. The historic ruins were transferred to the Museum of Kazimierz Dolny (now the Nadwiślańskie Museum in Kazimierz Dolny). Since then, a period of intensive complex work began: protection, renovation, conservation, and various conservation studies. Within the framework of these activities (preceded by a number of specialist interdisciplinary studies, including historical, iconographic, archaeological, architectural, structural and geophysical ones) temporary and permanent reinforcements were made to the wall structures, and selected elements of the castle premises were reconstructed Various concepts for the arrangement of the permanent ruin, partial reconstruction and adaptation of the castle were developed in order to adapt it for museum and exhibition purposes, as well as tourist services. In connection with the needs of expanding the tourist offer, a small open-air museum was introduced into the castle's surroundings, with a wooden manor house (used as offices and accommodation for tourists) and several wooden buildings. At this stage the concept of protection was also extended to take more account of the landscape conditions and the relationship between the castle and the town - in terms of tourism and economic strategy.

View of the castle from the south (photo from the collection of Nadwiślańskie Museum in Kazimierz Dolny)

Aerial view of the castle (photo from the collection of Nadwiślańskie Museum in Kazimierz Dolny)




Konstanty Przykorski, figure from: Tygodnik Ilustrowany, 1866, issue 362 p. 97.
https://www.warownie.pl/2018/09/janowiec/



Wojciech Gerson, Janowiec, 1888

The original intentions of the conservators of the Janowiec Castle, which in principle assumed preservative conservation consisting of structural protection in the form of a permanent ruin with minimal additions, were verified in the 1990s by allowing the possibility of partial reconstruction. Apart from utilitarian reasons (the introduction of new functions), one of the reasons for the changes in the conservation proceedings were technical reasons and difficulties in maintaining the ruins in good condition. In 1993, a plan was drawn up which, in contrast to earlier assumptions, provided for the reconstruction of the northern house, the western wing, the first floor of the southern amphitheatre, and an increase in the scope of the reconstruction of the eastern wing. It was assumed that the primary use of the castle would be as a museum, supplemented by related tourist functions offering catering and accommodation services, as well as leisure and entertainment facilities with walking trails, viewing areas, and as a venue for cultural events. This plan has not been fully implemented. Reconstructions were carried out in the gatehouse, the north house, the west tower, the west suite, and the east wing. The first floor of the east tower was rebuilt, and its higher parts of the walls were partially extended and strengthened. The walls were partially filled in and the crowns of the walls in other parts of the castle were secured. The conservation work and changing concepts for the development and use of the castle have not been fully implemented. The historic complex still poses a number of problems for its managers.

Janowiec Castle. View from the east. Photo by A. Fortuna-Marek

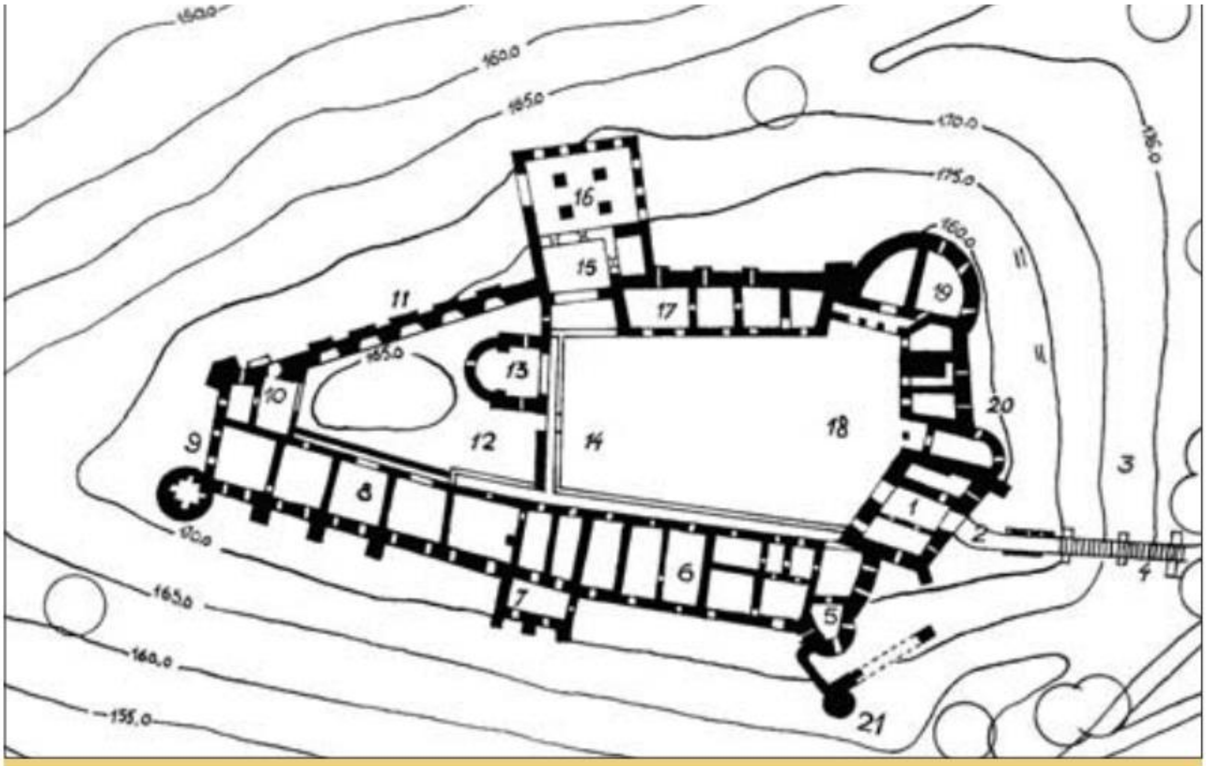
Janowiec castle. View of the chapel and the east wing. Photo by A. Fortuna-Marek

The castle is situated on a high limestone hill with the village of Janowiec and the Vistula valley at its foot. Such a location provides the castle with a view of the wide surroundings and at the same time provides visibility of the castle from long distances. What is important about Janowiec's location is its close proximity to Kazimierz Dolny, situated on the opposite, eastern bank of the Vistula River. The geographical location of Janowiec is connected with the Lesser Poland Vistula Gorge (Małopolski Przełom Wisły). Due to its natural and landscape values, Janowiec is located within the borders of the Kazimierz Landscape Park. To the east, the castle complex neighbors with a park and, further away, with wooden buildings of a small open-air museum (a manor house together with farm and house buildings).

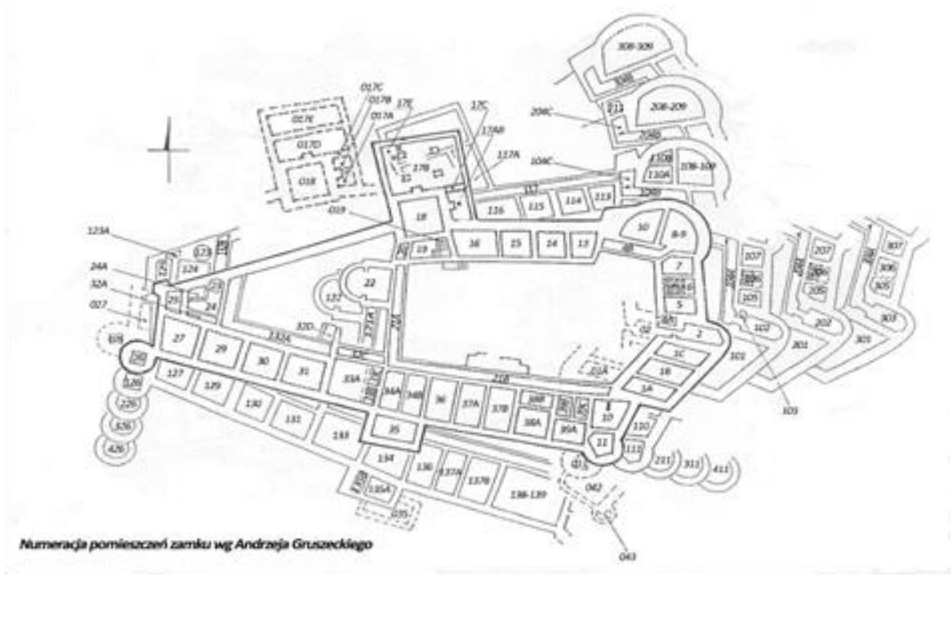
Manor house from Moniaki. Photo by A. Fortuna-Marek

The castle is built on a plan similar to an irregular, elongated quadrilateral. The longer sides of the building are situated in an east-west alignment. The building is made of local limestone and brick (different materials and techniques are used in the parts that have undergone conservation and reconstruction). A gate building is located to the east. Residential buildings were situated along the castle's defensive walls. At present the buildings in the northern part and partly in the eastern part have been preserved (reconstructed). The southern part and the part closing the grand courtyard from the west (with a chapel) remain in ruins. The buildings in the western part of the castle, enclosing the second of the inner courtyards, have been largely reconstructed.

A view from the castle. Photo by A. Fortuna-Marek




4. Zamek, rzut poziomy. 1) budynek bramny, 2) szyja przedbramia, 3) fosa, 4) most, 5) wieża wschodnia (pierwotnie baszta *puntone*), 6) amfilada południowa, cz. wschodnia (pałac Andrzeja Firleja), 7)wieża mieszkalna południowa (ryzalit południowy), 8) amfilada południowa, cz. zachodnia (pałac Tarłów), 9) wieża zachodnia, 10) apartament zachodni, 11) mur obronny północny, 12) Dziedziniec Mały, 13) kaplica ze studnią, 14) krużganki, 15) wieża mieszkalna północna (rozebrana w XVII w.), 16) pomieszczenia czeladne (wybudowa północna), 17) dom północny, 18) Dziedziniec Wielki, 19) basteja wielka, 20) skrzydło wschodnie, 21) basztka na podwalu. Rys. T. Augustynek, 1995.




Numbering of the castle rooms according to Andrzej Gruszecki (from the collection of Nadwiślańskie Museum in Kazimierz Dolny)

## Description of the problem - management

The castle complex in Janowiec is distinguished by its exceptional monumental values - historical, as a place connected with important people and events on a Polish scale; documentary and scientific, as a multiphase work of defensive and residential architecture, which has been and may still be a subject of scientific research in many fields; architectural and artistic (a monument of military architecture, a residential building with representative form and decoration, created by famous artists); a number of intangible and symbolic values (e.g. as a characteristic object and ensemble giving identity to the town and its surroundings). Due to its location, the castle also has outstanding landscape values as a dominant feature of the vast area of the Vistula gorge.

The form of the monument and its location - historical ruin, clear multi-phase history of transformations determines the value of the monument as a historical document, as an object of great artistic value and exceptional landscape value. The present form, substance, location, and exposition of the castle - despite repeated and varied conservation interventions (including partial reconstruction) - retains its authenticity in many aspects.

View of the castle from the south. (Photo from the collection of Nadwiślańskie Museum in Kazimierz

However, because of the unique landscape qualities and the distinctive, "iconic" silhouette of the castle, protection in a landscape context - the preservation of views "from the castle" and "to the castle" - is a very important consideration. The site manager has no direct influence on the protection of the castle on a landscape scale. This protection is guaranteed to a certain degree by appropriate arrangements (orders, bans, restrictions) adopted in the local spatial development plan, whose adoption is the responsibility of the local government. However, the Janowiec commune has not established the so-called cultural park, which would be the most effective form of protection - also on the landscape scale.

The landscape protection policy of the castle requires the cooperation of a wide range of stakeholders, including representatives of the local government and local governments of other levels, planning, conservation, and environmental protection bodies.

Thanks to the protection, renovation, reconstruction, and adaptation works carried out in the second half of the 20th century, the ruins of the castle have survived and are now open to tourists. The work, which lasted several dozen years, was possible thanks to high funds granted from state resources and to a management unit aware of the importance of the castle ruins. However, both the renovation and conservation work as well as the protection of the castle have not been completed. The specific character of the castle ruins (first of all, direct exposure of the walls to atmospheric agents, climatic conditions prevailing in Poland, relatively perishable building material) is the reason for rapidly progressing negative changes in the technical condition. The technical condition of the castle ruins in Janowiec varies. The condition of the walls and roofed rooms can be considered satisfactory. However, the condition of the crowns of the walls and unroofed parts is unsatisfactory or bad. The preservation and conservation work done in the last dozen or so years is not sufficient - above all, the process of deterioration of unprotected parts of the walls is progressing rapidly. The main reason is insufficient funding.

Graphic attachment to decision A-500 of 17. 05. 1971 on the entry of the landscape and architecture complex of Janowiec into the historical monuments register

Destruction of the historical substance. Photo by A. Fortuna-Marek

The maintenance, use and development of the castle in Janowiec has continually posed significant problems for its managers. The problems and threats connected with the maintenance of the historic foundation are still present and have a significant impact on the condition of the historic ruins of Janowiec castle. At the same time, a significant increase in the number of tourists in the last few years (from 5,000 to 60,000), a significant increase in cultural events and large parties organised in the castle and its surroundings, an increase in the demand for accommodation for tourists, the need for the museum to generate income from its own activities are the main reasons for which the manager of the complex is looking for new forms of use and management, e.g. by extending the profile of activities. The ideas are varied, e.g. the reconstruction of a historical vineyard under the castle, sheep farming, expansion of accommodation and conference activities (which would require new volumes), the creation of a center for research into historical ruins.

Further preservation of the castle in the form of a permanent ruin, while at the same time making it possible to use it for its present functions and development, is problematic and illustrates the scale of the preservation problems.

The Museum, fulfilling its statutory goals, maintaining a historic building that requires difficult decisions and poses many problems, as well as striving to develop tourism and promotion, cooperates with many stakeholders, including Lublin University of Technology; in the field of preservation of the historic form and substance, threats and monitoring - with authorities and institutions of monument protection (Lublin Voivodeship Conservator of Monuments, Conservator's Council at the Voivodeship Historical Monuments Office, Regional Branch of the National Heritage Institute in Lublin); in the field of presentation, accessibility, education and development of tourism - with the media, many organizations and associations active in the field of tourism and promotion; in the field of use and development - with local and provincial self-government, local community and associations.

An important aspect of the Museum's activity are undertakings concerning the creation of cultural offer not only for tourists but also for local society. The Museum, in cooperation with local government and various entities (local, regional, national) organizes many cultural events - exhibitions, concerts, theater performances, reconstruction shows, knights' shows, regional products fairs. Some of these events are cyclical, with recognized brand and arousing interest of a wide audience, e.g., Wine Festival, Vistulan Night of Museums, European Heritage Days, Film and Art Festival Dwa

Brzegi organized in Kazimierz Dolny and Janowiec, Nadwiślańskie Encounters with Poetry, Janowieckie Interpretations of Music, Jazz Festival. Thanks to such initiatives, among others, there is a constant and a significant increase in the number of tourists.

Vistulan Meetings with Poetry (photo from the collection of Nadwiślańskie Museum in Kazimierz Dolny)

A medieval tournament (photo from the collection of Nadwiślańskie Museum in Kazimierz Dolny)

The museum also conducts business activities - primarily in the field of tourist services (cafe in the ruins of the castle, accommodation in the manor house of Moniak), making the area of the park and the castle available for wedding photo sessions, providing a place for a bonfire, running a souvenir store.

The Museum - Branch in Janowiec faces various adverse conditions related to its maintenance, use and development. Further development in terms of functional-utility changes, e.g. in order to extend, enrich, make more attractive the museum offer and cultural and tourist activities, encounters a number of barriers. The most important of them include: the specific character of the object (historical ruin) and related difficulties in maintenance and opening, as well as limitations related to insufficient usable area, lack of possibility to enlarge the exhibition area and introduce additional functions, poor technical condition of part of the complex and difficulties in securing the ruins resulting from, among others, the parameters of the building material, insufficient financial investments, lack of precise vision and strategy of development.

The souvenir shop in the castle. Photo by A. Fortuna-Marek

## Conclusions

- The use of the castle and open-air museum complex by a museum unit is a positive management factor. This ownership ensures the preservation of the historic establishment and its values and the use of the monument primarily for museum and tourist purposes.

- The museum function should be preserved, continued and developed as it guarantees preservation of the historic values of the castle's assumption.

- It is a positive idea to strive for recognition of the castle complex as a Monument of History. An entry on the list of Monuments of History would sanction the high historical values of the castle, increase the chances of acquiring funds from various sources and facilitate promotion. We could consider inscribing Janowiec itself or extending the boundaries of Kazimierz Dolny as a recognized Monument of History to Janowiec.

- Protection of the castle ruins on a landscape scale should be strengthened. Viewing relations between the castle and Janowiec and wider viewing relations are important. Protection on this scale exceeds the competencies and capabilities of the castle manager (Museum). An effective form of protection in this respect would be the establishment of a cultural park "of the historic landscape of Janowiec Castle". This requires creating a forum for cooperation among the stakeholders involved in shaping the landscape, with particular emphasis on local government. In the course of creating the cultural park, it would be necessary, among other things, to specify the boundaries of protection with delineation of views and axes, as well as the boundaries of historical architectural and landscape units. However, the problem is the lack of conviction and need for such solutions on the part of local government.

- Preservation of the castle in a form of the so called permanent ruin is a proper way of dealing with historical ruins. However, the way of continuation of protective works and possibility of further interference in the structure (partial reconstruction? adding modern spaces/cubatures?) is not resolved.

- Preservation of multiple values of the historic complex in Janowiec depends on its proper protection, technical condition, and ways of its contemporary use.

- The present form of the historic castle complex consisting of cubature objects (both reconstructed and contemporary) and leaving a significant part of it in the form of permanent ruins causes that its technical condition ranges from very good to bad.
- A significant threat is the technical condition of some elements of the castle preserved in the form of a ruin. They require immediate protection and conservation work. It is necessary to stop further destruction and to preserve the castle with the essential part left as a permanent ruin.
- The problem is the lack of sufficient financial resources to carry out repair and conservation work - the amount of funds required exceeds the real capabilities of the museum. Without decisive action and a significant increase in funding, it is possible that the technical condition of the ruins will continue to deteriorate permanently, posing a real threat to the historic substance and form.
- The current level of financing of the Museum by the local government of the Lubelskie Province is insufficient - it ensures its current functioning, but does not allow for comprehensive conservation, renovation and preservation works, as well as for its development (introduction of new functions and new concepts of management and use). Perhaps an opportunity to change this situation would be a change of the museum's governing body through co-management and co-financing of the unit by the Lublin Province and the Ministry of Culture and National Heritage.
- The main management problem is the lack of a precise strategy and long-term investment plan, whose gradual and consistent realization would give a real chance for both preservation of historical values, improvement of technical condition, as well as extension of the utility functions and increase in attractiveness of offered services.
- It is necessary to develop a target concept of development and use of the castle complex, which should be based on the results of long-term research in various fields (archaeological, architectural, geo-radar studies, historical documentation, inventories, technical evaluations, as well as archival, bibliographical, and iconographic queries).
- A positive management intention is to concentrate and develop the exhibition - museum functions in the castle.

- A good idea for the development of the museum functions is the creation of a "museum of ruins" in the castle - i.e., the development of an extensive exhibition which will present the problem of historical ruins of historic buildings in many aspects (formation, maintenance, protection, development, use, threats, etc.) in a historical and geographical cross-section. At the same time, the castle in Janowiec would become a "living" element of this exposition (in situ presentation of problems connected with preserving the castle as a permanent ruin).
- It was a good idea to locate accommodation functions (guest rooms) in the manor house building accompanying the castle. Arranging guest rooms in the castle is problematic - it creates additional potential risks and may cause dispersion of organizational resources and activities.
- A positive aspect of management is the cooperation of the Nadwiślańskie Museum in Kazimierz Dolny and its Branch - Castle in Janowiec with many stakeholders in different areas of management.
- It is a good management idea to build the image the castle in Janowiec as an attraction of national importance, while maintaining communication with the tourist development of the region (evolution of the "Tourist Triangle" concept) and in the context of a network of the most valuable historical buildings on a national scale (e.g., Monuments of History) and macro-regional (European castle ruins).
- A good result of the management is a significant increase of tourists and residents of Janowiec visiting the castle and participating in cultural events organized by the Museum.

A view from the castle. Photo by A. Fortuna-Marek

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*A CASE STUDY – ITALIAN MANAGEMENT*

## ***The Dante's House Museum*** **Unione Florentina**

**Developed by Corina Del Bianco, PhD**
**With the contribution of Serena Stagi**

# Introduction

The following paper presents an institution located in Florence and committed to promoting the values of local identity as well as one of the most important figures in both Florence and Italy's history and culture: Dante Alighieri. The case at hand is particularly interesting in that despite being a minor museum in a highly visited city such as Florence, its management is defined by a few peculiarities which will be outlined below.

The present report is based, on one hand, on a specific bibliography focusing on the Poet's figure, the Medieval Florence and the museum's history and structure; and, on the other, on an interview with the museum's coordinators, Tullia Carlino Hautmann and Angela Spinella, who deal with all management-related issue on a daily basis. This report will also touch upon the problems brought on by the Covid-19 pandemic, which has had a significant impact on the museum's management, not only from a financial perspective – the museum was forced to close for more than three months and the works for the new set-up had to be stopped while they were still in progress – but also to equip paths of fruition and work that respect the restrictions imposed by law.

## The Florentine Museum dedicated to Dante Alighieri

### *Origins and location*

The Dante's House Museum is among the most visited minor museums in Florence. It is dedicated to Italy's greatest poet, Dante Alighieri, and it is situated in a building located in Via Santa Margherita 1, where the houses owned by the Alighieri family once stood and where the Poet himself was born. Despite being a reconstruction, the building is one of the most distinctive of medieval Florence. In 1965, the Unione Fiorentina Association asked and was granted permission by the City of Florence to establish a museum dedicated to Dante in the rooms of his house, that it still runs and manages to this day.

Figure 1: The museum's location. Satellite image Google Maps.

Figure 2: View of the façade of the tower covered in *pietraforte*, with putlock holes, Dante's bronze bust and the indication for the entrance located on the side of the tower. Photograph taken in the little square in Via Santa Margherita. Photographs by Corinna Del Bianco.


Figure 3: The entrance to the Dante's House Museum. Photograph by Corinna Del Bianco.

Dante Alighieri is an essential figure in the history and culture of both Italy and Europe and is considered the father of the Italian language. Born in 1265 in Florence, his life was marked by the loss of the great loves of his life: the woman he loved, Beatrice, and his beloved city, Florence, that he was forced to leave in 1302 because of a politically motivated exile; he died in Ravenna in 1321, after years of travelling around Central and Northern Italy. His writings include poetry as well as philosophical and political works, but his masterpiece is the *Divine Comedy*, counted among the most important works of both Italian and international literature. The *Comedy*, written in verse during his exile and until his death, recounts Dante's imaginary journey through the three afterworlds: from the sins of Hell, to the atonement of Purgatory and the salvation of Paradise, pursuing salvation for himself and for all mankind, whom he indirectly represents. During this journey, Dante, guided by Latin poet Virgil, meets the souls of tens of relevant, important or significant people from history and his own time, recreating a vibrant and immortal picture of medieval society. The *Comedy* is considereda particularly innovative poem because of its subject, which starts from the depths of Hell and reaches the heights of Paradise, ending with the vision of God, as well as the language it is written in: the vulgar tongue, the language spoken in Florence by the people of Dante's time. With this revolutionary linguistic choice, Dante made sure that his poem was universal so that even people who hadn't received an education could potentially understand it. Dante was the first to write about such holy matters using the vulgar tongue instead of Latin, the language used by the intellectuals of his time, a choice Dante will be harshly criticized for by his contemporaries. In the Middle Ages and up until the Italian unity (achieved in 1861), the country was divided into multiple territories each with its own vernacular developed from Latin[1]. The *Comedy*'s success made sure that, from the 14th century on, the Florentine vulgar tongue, Dante's language, became a model for writers. So when it came to choose a national language, the Florentine language – aptly modernized – proved itself to be the best option, making Dante the father of the Italian language.

The *Comedy* is an extraordinary journey through medieval society, written in a time when Florence was quickly expanding, growing and establishing itself as one of the richest and most powerful cities of all Europe. The landscape of medieval Florence was characterized by tower-houses, symbols of power and prestige. This kind of dwelling

[1] Dante explores the subject in one of his Latin works, the *De Vulgari Eloquentia*.

was brought into the city by noble families originally from the countryside, who, settling into the city, reintroduced the castle model used in rural areas. The tower is part of a castle and as such had a double purpose, both offensive and defensive (Fei, 2015). The height of these structures was a symbol of power and given the harsh and violent rivalries between the most powerful Florentine families, tower-houses were frequently made higher, sometimes reaching up to 70-75 meters (almost 250 feet tall), at risk of frequent collapses, for structural reasons as well as demolitions enforced in case of defeat[2]. In 1250 an order was issued that forbade to go over 29 meters (95 feet) in heigth, and as a consequence many of the already existent towers were "cut". Tower-houses were usually square-based and covered in stones with small openings on the façade, which made them structurally more solid but also not the healthiest place to live in, as well as variously-shaped irons which served multiple purposes: from candelabra and flag-holders to irons to tie horses or baggage animals. Their indoor arrangement was extremely simple, with a room on each floor which was vertically connected by ladders or wooden stairs or by simple ropes going through openings in the vaults. In the basement food and wine were usually stored, on the ground floor there was often a courtyard with a well, an oven and the stable, whereas the living room and the dining room were located on the first floor. The bedrooms were usually situated on the upper floors, with the highest floor reserved for the kitchen with a hearth (Mercanti, Straffi, 2003). Among the most interesting still-existing examples are the Chestnut Tower (via Dante Alighieri), in full view from the loggia on the third floor of the museum, the Acciaiuoli Tower (in Borgo Santi Apostoli), the Baldovinetti Tower (via Por Santa Maria) and the Adimari Tower (via Calzaiuoli). Silvano Fei also mentions an odd habit that can shed some light on the life and urban organization of medieval Florence, explaining that for safety and faction reasons, towers were usually very close to each other and this allowed them to be connected with overhead passegeways called *torrazzi*, whose structure was inserted into the towers' putlock holes, which, having served their purpose in their construction, were left uncovered. This practice created clusters of towers often connected by passageways at remarkable heights (Fei, 2015). The houses of the families close to the most powerful clans surrounded their towers.

[2] Silvano Fei also talks about how difficult it was to destroy a tower and how the task was carried out: "*They dug at the bottom of the tower which was then propped up with wooden beams that were set on fire. The tower would then fall entirely and it was necessary to make sure that it didn't damage, in its fall, the buildings nearby.*" (Fei, 2015, p. 20).

The museum is located in a building reconstructed at the beginning of the 20th century, designed by architect Giuseppe Castellucci, in the same spot where the Alighieri houses were once situated. Their original location had been meticulously researched by a specially appointed committee of experts who had managed to pinpoint the Poet’s house in the area facing the Chestnut Tower through information found in Dante’s Poem, cadastral enquiries as well as still surviving centuries-old traditions (Fei, 2015). Despite it not being original, the building faithfully represents the architecture handed on by folk memory and the structure maintains the typical characteristics of a way of life and building connected to the social, cultural and economic world of 13th century Florence. Castellucci designed a dramatic medieval-style spot where the Alighieri house, with pietraforte-covered walls, a lean-to roof with a well underneath and a tower, overlook a small square, though the tower was probably owned by the Giuochi family: Dante’s family belonged to the minor nobility and as such wouldn’t have been able to own a tower-house (Fei, 2015). The tower’s façade facing the small square is covered in pietraforte and features putlock holes, windows of the tower’s first and second floors and a bronze bust of Dante by artist Augusto Rivalta.

The building has four floors above ground, structured in two volumes with a third acting as a connection and surrounding a back courtyard which isn’t part of the museum; access to both is granted by a staircase located immediately after the entrance which leads to the ticket office or the tower’s first floor. The tower has a remarkably thick wall system and houses two official rooms on the first floor and the office of the Unione Fiorentina on the second. The second volume, located east of the little square, is dedicated to the museum exhibit which consists of nine rooms, plus a bookshop on the ground floor. It is distributed by a second staircase, smaller than the first one but improved by a pietra serena finish. Furthermore, the vertical layout is completed by a glass lift situated into the courtyard distributing the four floors. The last floor is characterized by a loggia which offers panoramic vistas of the the Chestnut Tower and the main monuments of the city’s old town centre. For safety reasons, the loggia has been closed with glass screens (Fei, 2015). Finally, the building is provided with a bathroom on each floor: an accessible toilet on the ground floor for disabled visitors, the staff’s bathroom on the first floor and another one for visitors on the second.

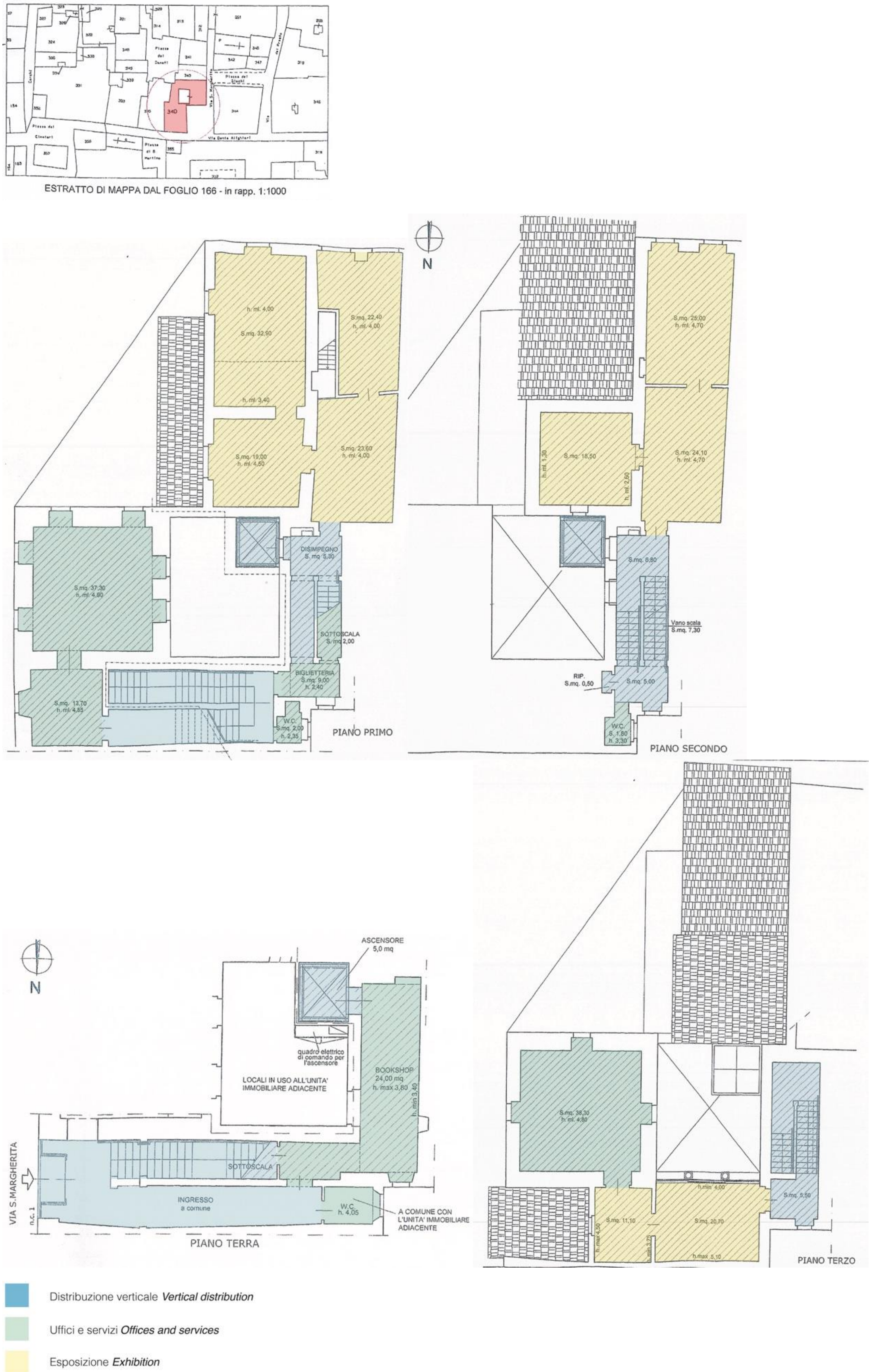
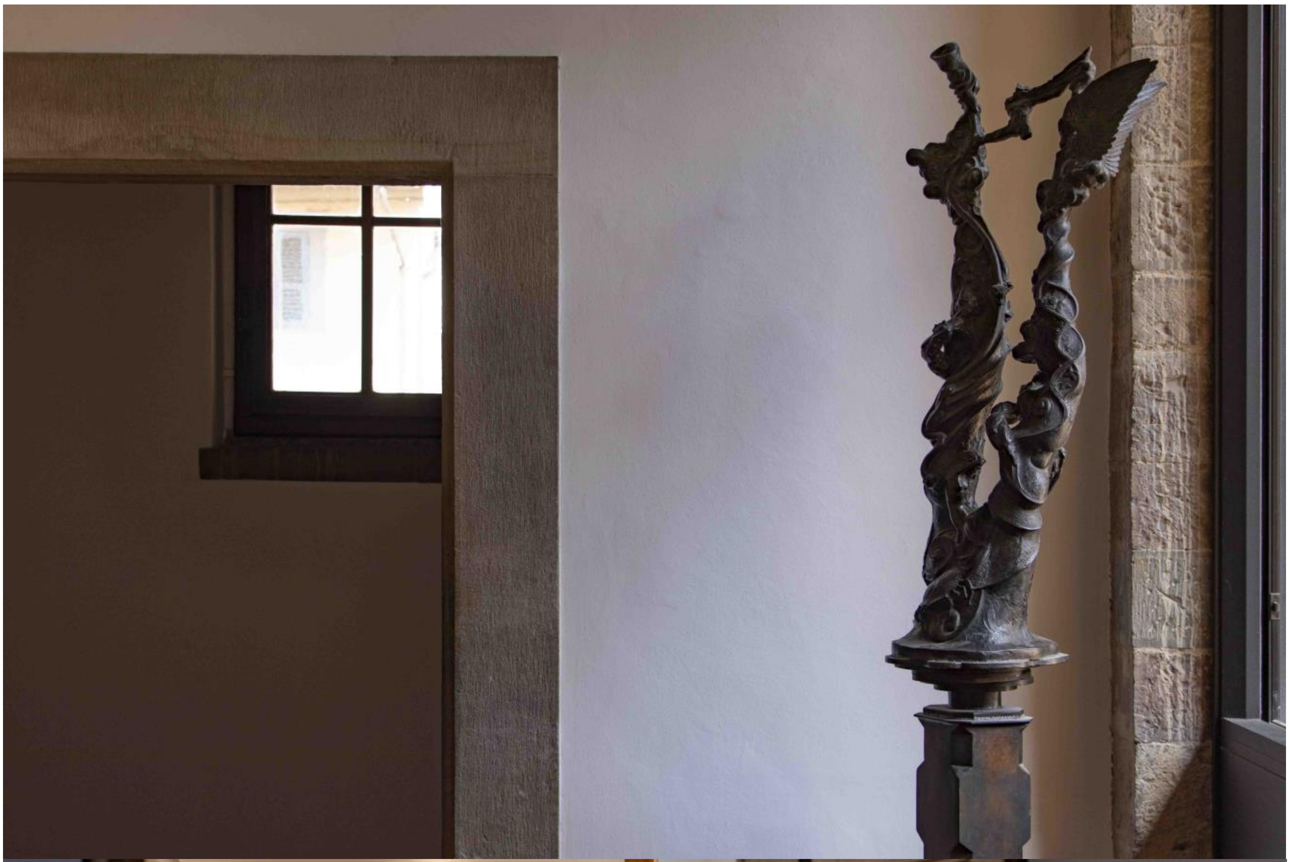



Figure 4: Cadastral plan and plans of the ground, first, second and third floors which highlight the areas used as offices and services, for the exhibit as well as the vertical layout. Survey by Museo Casa di Dante – Unione Fiorentina, schemes by Corinna Del Bianco.

Figures 5 and 6: Views of the Chestnut Tower from Via Dante Alighieri and the loggia on the museum's third floor. The tower of Palazzo Vecchio and the museum's glass lift are also visible. Photographs by Corinna Del Bianco.



Figures 7 and 8: A sculpture by Greg Wyatt located in the loggia on the third floor and a view of the staircase from the second floor. Photographs by Corinna Del Bianco.

Figure 9: Partial view on the inside courtyard and the loggia on the third floor with the sculpture *Paradise and Hell* by Greg Wyatt, as seen from the second floor. Photograph by Corinna del Bianco.

Figure 10: Detail of the staircase distributing the museum's floors, finished in the traditional pietra serena. Photograph by Corinna del Bianco.

### *The Museum's mission*

Born from a free cultural association, the museum is founded on the values that also define its mission connected to the popularization of the knowledge of Dante Alighieri's figure as well as medieval history and civilization. The building in which the museum is located is of great value from an architectural standpoint as well as for its function as a museum, because it communicates the city's cultural roots to Florentine residents and tourists alike. The museum also gives voice to that intangible heritage stemming from Florence's culture, which, in turn, delivered the cultural and architectural expressions recognized as world heritage. The museum's management is therefore actively committed to cultural development through education and popularization to safeguard and enhance Florence's intangible cultural heritage which would otherwise be at risk of disappearing forever, especially on account of an urban planning and policies that haven't been able to steer and contain tourism, inevitably and irreversibly altering the city's cultural identity.

### *The Museum's set-up*

The museum's arrangement has gone through a series of changes and reorganizations, including one of the most recent in 2005, when the museum was reorganized with the support of the Fondazione Romualdo Del Bianco® – Life Beyond Tourism®[3] and its *Be Part of History® with Dante* initiative along with the Fondazione Cassa di Risparmio di Firenze[4]. Then, in 2008, the museum was upgraded with new and extremely interesting exhibit spaces, such as a new display dedicated to goldsmithing. Moreover, in 2010, the museum has acquired, through private donations, new valuable and original objects from the Middle Ages narrating medieval day-to-day life. Finally, in 2020, despite many financial and red tape difficulties, not to mention the Covid-19 pandemic, the museum has managed to complete an all around renovation of its exhibit spaces that have provided the structure with innovative and technological paths allowing for a richer and more modern visit experience.

[3] The Fondazione Romualdo Del Bianco – Life Beyond Tourism is the case study chosen as an example of good practice in cultural heritage communication. It works towards opening a dialogue between cultures through heritage and travel. www.fondazione-delbianco.org and www.lifebeyondtourism.org

[4] The Fondazione Cassa di Risparmio di Firenze is a non-profit organization which works towards the benefit of its territory in five areas of intervention: 1) environmental protection and quality, 2) youth growth and training, 3) scientific research, 4) charity, volunteering and philantropy, 5) art and culture. www.fondazionecrfirenze.it

## The museum's management: the Unione Fiorentina

### *The Unione Fiorentina*

As previously mentioned, the museum's management is run by the Unione Fiorentina, a cultural association established in Florence in 1949 thanks to the activity of well-known figures of Italian culture and arts. The association was founded in a particularly difficult and yet vibrant historical moment for Florence, which was in the midst of reconstruction after the Second World War. The rebirth had to be material as well as intellectual and artistic and there was an urgent need for a restored national culture with new-found interests and cultural drives (Gentilini, 1992). The Unione Fiorentina was therefore founded to unite those who were interested in the promotion of the social, economic and cultural values typical of the Florentine culture, and in promoting Dante Alighieri's figure. Renowned figures of the cultural scene, both Florentine and Italian[5], joined the association straightaway with the mission of promoting activities that could positively contribute to the protection and development of the historical, cultural and artistic traditions of Florence's intangible heritage, acquainting the world with Dante and stimulating creativity through initiatives capable of interpreting the city's contemporary culture from the very first years of activity (Gentilini, 1992).

### *Main activities of the Dante's House Museum – Unione Fiorentina*

The Unione Fiorentina is the association in charge of the Dante's House Museum's care, preservation and management, ensuring it stays open to the public, and has always organized activities that contribute to raise awareness about local culture through educational, cultural and recreational initiatives involving residents and travelers alike. Over the years, for instance, it has promoted courses, seminars, meetings, scholarships, debates and contests involving the City of Florence, giving a significant contribution to local cultural development. Among the memorable and illustrious events conceived by the Unione Fiorentina are the course of lectures in Palazzo Strozzi known as *Libera Cattedra di Storia della Civiltà Fiorentina* ("Free Chair of History of the Florentine Civilization") (1950-2014), which saw the participation of personalities such as Eugenio Garin, Paolo Lamanna, Carlo Emilio Gadda, Giovanni Michelucci, Le Corbusier, Giuseppe Ungaretti, Harold Acton, Giorgio De Chirico, Pietro Calamandrei and Carlo Bo; the *Premio del Fiorino* ("Florin Award") (1950-1977), with a painting

[5] For instance: Francesco Adorno, Piero Bargellini, Primo Conti, Enzo Faraoni, Aldo Palazzeschi, Giovanni Poggi, Vasco Pratolini, Ottone Rosai, Giovanni Spadolini, Geno Pampaloni, Mario Luzi and Giacomo Devoto.

contest; the *Biennale Internazionale della Grafica d'Arte* ("International Biennale of Graphic Design") (1968-1978); and the celebration of the *Annuale di Dante* ("Dante's Anniversary"), established in 1959 along with the *Comitato per i Luoghi familiari di Dante* ("Committee for Dante's family haunts"). As Gabriella Gentilini points out, listing every single project promoted by the Unione Fiorentina is impossible, as it always has been very active in protecting artistic and cultural heritage through several initiatives, in Italy as well as abroad (Gentilini 1992, p. 37). The activities still go on today, particularly focusing on a museum conceived as a live being, a dynamic cultural project that strongly interacts with local and foreign communities, establishing a dialogue based upon local cultural expressions and therefore contributing to their preservation, promotion and communication.

### *The museum's visitors*

The museum welcomes more than 80.000 visitors every year, making it the most visited minor museum in Florence. Located at the heart of the old town centre, the museum the museum is on many travelers' path and as such welcomes visitors of all ages and nationalities. Additionally, it's a destination for many school groups of all ages and levels that can also request specific educational activities conceived for elementary, middle and high school pupils (between 6 and 19 years-old) as well as adults. Among these activities, some of the most successful ones are: *Dante and the Middle Age*, an educational group game; *The Hearty Meal*, a theatre workshop; *Culture Pulls Down Walls*, a workshop that touches upon migrations and integration issues and stresses the importance of understanding and respecting cultural differences using Dante's *journey* through the three afterworlds (Hell, Purgatory and Paradise) in the *Divine Comedy* as an opportunity for social reflection. Finally, it's important to notice that the Poet and his masterpiece are an essential part of the compulsory education in the Italian school system, therefore the museum presents teachers with a point of reference for educational activities connected to the national curriculum.

### *Professional roles essential to daily activities*

The Unione Fiorentina is a mainly voluntary organization inspired by the democratic principles of the Italian Constitution and as such manages the museum through a collective body, the Board of Governors, which operates on the field through two people responsible for coordinating all museum activities. The coordinators' duties are established by the Board of Governors: one is more focused on coordinating projects and cultural activities as well as dealing with external relations, such as communication and relations with the human resources collaborating with the museum, while the other manages the financial administration, including the commercial and bookshop activities. These two figures are joined by a series of external operators:

- the museum operators in charge of the ticket office, the bookshop, the booking office, guided tours and educational activities;
- the cleaning company;
- the company that sees to the electrical, fire-prevention and video surveillance systems maintenance;
- the agency responsible for all safety regulations concerning the building and the people in it (coordinators, staff and visitors alike);
- the co-op specializing in managing all educational and tourist activities and services.

The museum's communication is directly managed by the coordinators with the help of the museum's staff, the collaboration with professional journalists and the society that takes care of the museum's online presence. As Tullia Carlino Hautmann points out in her interview[6]:

*"In the last few years, the role of the museum operator has significantly changed from the traditional "guardian" or "museum attendant". Simple tasks like welcoming visitors are often carried out, as it happens in our case, by qualified people with college-level education and specialist skills (from historical and literary knowledge to skills connected to technology and web 2.0 development, especially social media)."*

Furthermore, recalling her own experience, she stresses how important it is for a young person to actively participate in the local cultural life and to take on the challenges that it may offer. Both Tullia and Angela found out about the Unione Fiorentina when they were college students by attending different meetings and volunteering for the association. Their passion naturally developed into a proper career.

### *Access to funds*

The museum's management involves several themes ranging from the smallest day-to-day tasks (concerning visitors and cultural operators) to the requirements of the Italian legislation. The museum is a private institution and as such, as stated by Tullia Carlino

[6] The interview with the two Museum's coordinators, Tullia Carlino Hautmann and Angela Spinella, is included at the end of the paper.

in the included interview, enjoys more autonomy in setting goals and creating strategies to reach them; at the same time, however, this prevents the museum from accessing the public funds that national and municipal museums benefit from. Moreover, the issue of accessing funds is made even more substantial by the fact the Italian legislation has yet to develop an organic law-system that could allow companies to financially benefit from donations to culture. The 2008 economic crisis has further curtailed private patronage. Therefore, the museum's finances are based upon the revenues from ticket and bookshop sales; the bookshop is, for the moment, only a physical store inside the museum but, in time, will also be available in e-commerce. As a consequence, it's obvious how there's only a limited financial freedom that makes it difficult to afford measures that can improve the visitors' experience but that, at the same time, are very expensive. For instance, the museum was in need of a new set-up, to rearrange the already-existent collection in order to enhance it and to update the technologies used in the exhibit experience. Thus, the Board moved to renovate the museum, but accessing the necessary funds to finalize the project and complete the works wasn't easy. It took four years and despite a few proposals, there were no external investments, and, in the end, the management has resolved to rely only on itself with a policy of cautious parsimony that made the project possible. Works for the new set-up began between the end of 2019 and the beginning of 2020 and were supposed to be completed in time for the museum's reopening on March 25th, the *Dantedì*, day dedicated to Dante. Unfortunately, due to the Covid-19 pandemic, the works couldn't be completed in time and the reopening had to be postponed to June 24th, 2020[7].

*The theme of safety in the workplace and restrictions due to the Covid-19 pandemic*

The theme of safety in the workplace, as far as the Italian legislation is concerned, is regulated by Italian laws and European directives. These laws are extremely rigid and they aim to protect employees as well as visitors. More specifically, the museum has redacted a Risk Assessment Document (DVR) and an Emergency and Evacuation Plan (PEE) and it ensures the ongoing training of its staff, with periodical refresher courses, especially concerning First Aid and Fire Prevention. Moreover, between 2002 and 2005, the building has underwent a structural reinforcement intervention with the removal of architectural barriers as required by Italian legislation. Due to the Covid-19 pandemic, the museum, like many museums in Italy, has remained closed for more

[7] The photographs that are part of the present text have been taken on the day of the museum's new set-up inauguration.

than three months and had to reorganize, with a consequent raise in expenses, the visit paths to maintain social-distancing, curtail admissions and take all sanitizing measures required by the Italian law to ensure the visit to the museum in complete safety. This all needs to be put in the Florentine context which significantly relies on that tourism-generated economy that has been completely stopped by the pandemic, resulting in financial-economic difficulties even at an urban management level, and thus incapable of supporting the smallest cultural realities.

## The new set-up project

As previously stated, accessing funds for an all around renovation of the museum hasn't been easy and only a careful management of the museum's revenues, mainly from ticket and bookshop sales, has made it possible.

The former arrangement was outdated, and the museum was in danger of losing appeal and cutting down its chances of improving activities and ticket sales. For this purpose, the museum's coordinators have strongly advocated for a new arrangement project and have worked for four years to reduce small and great expenses (for instance, day-to-day management expenses; i.e. consumption rates; or even simple expenses, i.e. new stationary) working with a dynamic group capable of facing multiple demands.

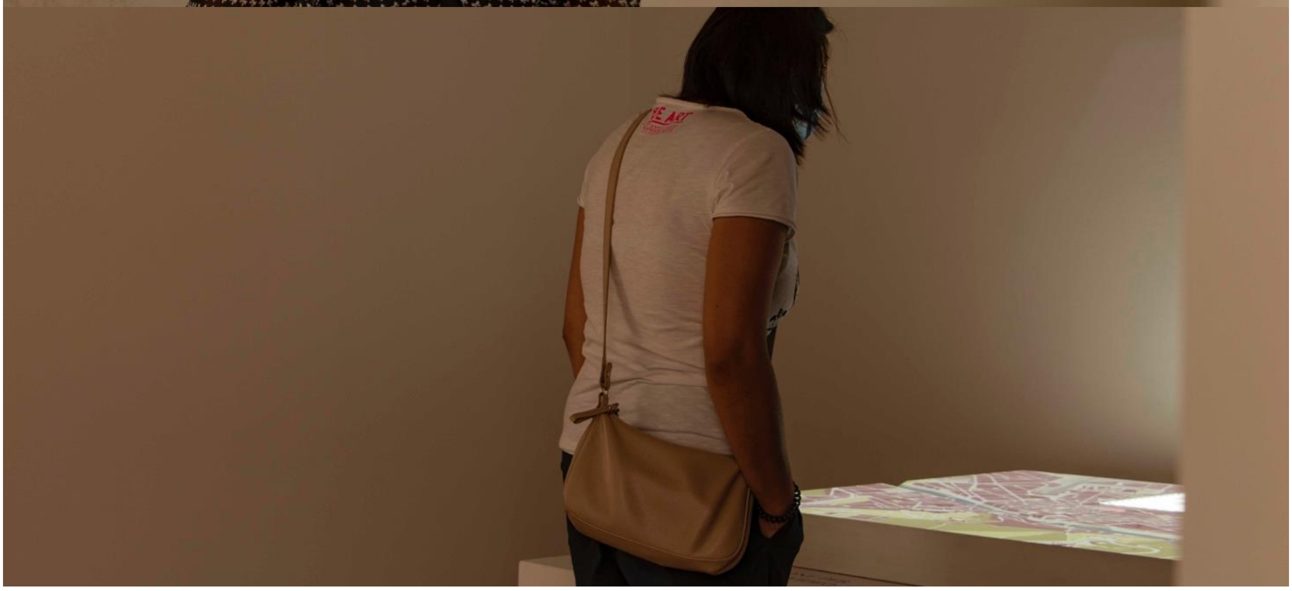
### *The concept plan*

In order to guarantee an actual innovation of the museum's set up, the new project developed a concept that works with a new kind of narration that, thanks to several technological solutions, allows for the realization of a visit path that offers different degrees of detail according to different visitors. Each of the three floors focuses on a different theme: the first floor is entirely dedicated to Dante, his life and political career, and the Florence of his days, with its economy and political fights; the second floor, which also includes a reconstruction of Dante's bedroom, focuses on 13th century poetry, the Poet's literary works and especially his masterpiece, the *Comedy*. Finally, on the third and last floor the visitor is invited to move their gaze on the outside, over the roof-level terrace, and is provided with additional info in order to understand medieval Florence and its modern legacy.

## *The importance of context*

The new arrangement pays great attention to context, attention that is immediately made clear at the museum's entrance, where Dante's voice, coming from a screen on the wall, invites visitors and passers-by to enter and visit his house. This also applies to the first floor where a timeline chronicles the most important events of Dante's life but also the most significant historical events in Florence, Italy and Europe in general. The narration then focuses on the Battle of Campaldino, the guilds and the Florentine economy, the city politics and the Poet's exile. The second floor gets to the heart of Dante's story, with his private life and his literary and philosophical works. The close relation between the museum and the surrounding context and landscape is further stressed with a final wide-ranging view – also thanks to Virtual Reality – and an invite to the visitor to rediscover Florence with new eyes thanks to new routes following the Poet's steps through the streets of the city. Thus, the visit doesn't end inside the museum but goes on even once outside the building: encompassing the surrounding area, Dante's house becomes a 'widespread museum' extending the visit experience over time.


Figure 11: The new set-up in *Room 1 – Who was Dante?* Photograph by Corinna Del Bianco.




Figures 12, 13, 14: Visitors in the rooms. Photographs by Corinna Del Bianco.

The arrangement has been completely renovated with a technology-based narration that includes screens and touch screens, Virtual Reality headsets, NFC technology[8] panels, slideshows, video mapping and drone footage.


[8] NFC technology (Near Field Communication) allows to access additional contents through smartphones and tablets.


LA DIVINA COMMEDIA
in 49 lingue e 22 dialetti
THE DIVINE COMEDY
in 49 languages and 22 dialec
Dialetti / Dialects
abruzzese
alto lombardo (comasco)
bolognese
bresciano
calabrese
ferrarese
genovese
istriano
lodigiano
milanese
mantovano
napoletano
padovano
perugino
piemontese
romagnolo
abruzzese dialect
como dialect
bolognese dialect
brescian dialect
calabrian dialect
ferrarese dialect
genoese dialect
istrian dialect
lodigiano dialect
milanese dialect
mantuan dialect
neapolitan dialect
paduan dialect
perugian dialect
piedmontese dialect
romagnol dialect


Figures 15, 16, 17: Set-up details in rooms 5, 7 and 2. Photographs by Corinna Del Bianco.

## Conclusions

Managing a minor museum in a highly tourism-based city such as Florence presents no easy challenge. The appeal of major museums and local heritage, especially tangible heritage, poses a threat to the city's cultural identity, because they are at risk of wearing out and being lost. In such a context, a minor museum's visibility is crushed by the major ones', but at the same time, it has the opportunity to tell something different to a wider audience that is already in the city. The challenge that the museum's management has decided to take on is precisely the necessity of promoting the values that make the Florentine cultural identity one of its kind, and to establish a dialogue between different cultures, promoting respect for diversity. For this purpose, it's necessary to work with multiple kind of visitors and encourage educational activities, both traditional and new, requiring visitor-interaction.

There are several multiple-levels management related issues, from long term ones, managing funds and detecting the visitors' needs and opportunities, educational and cultural activities, but also marketing and communication skills, as well as access to funds, financial management and implementing all safety and accessibility measures, up to day-to-day duties, like cleaning and ordinary maintenance in the office.

Bearing in mind the mission of the Dante's House Museum, the way all management aspects are coordinated represents a success because despite being a minor private museum in Florence with all the difficulties that its circumstances entail, the museum is an excellent example of a carefully managed cultural reality.

***Interview with Tullia Carlino Hautmann and Angela Spinella***

***Tullia Carlino Hautmann and Angela Spinella are in charge of the management of the Dante’s House Museum.***

***Florence, May 27th 2020***

**Q:** In order to foster a democratic management of the association, the Unione Fiorentina has a Board of Governors in charge of the museum which appoints two people tasked with coordinating all management-related duties. How long have you and Angela been doing this job?

**A:** The peculiar management of the Dante’s House Museum is rooted in its history and is strictly connected to the origins and foundation of the museum itself. In 1965, the association “Unione Fiorentina”, one of the greatest cultural associations of the time, established a museum dedicated to Dante inside his house. The Unione Fiorentina was and still is a mainly voluntary association which operates according to the democratic principles inspired by the Constitution of the Italian Republic. Even with the management of the Dante’s House Museum, the Association has always maintained to act accordingly and, unlike most museums, ours isn’t managed by a single director or person, but by a collective body, the Board of Governors, which operates in the field through two people responsible for coordinating all museum activities. The two coordinators are Angela and I, each of us focusing on a different field but always following the guidelines established by the Board of Governors. I, Tullia, take care of coordinating all cultural activities and projects, external relations, communication, relations with the press and the human resources collaborating with the museum in different capacities.

Angela takes care of the financial administration and is responsible for the commercial activity represented by the bookshop which, for the time being, is only a physical store, but that in Angela’s intentions, as soon as we have the funds to make it happen, will land on the Internet with an e-commerce platform.

Angela and I have been doing this job for almost ten years and it's been a journey of human and professional growth both thrilling and demanding. We started in 1993 when, as college students, we attended a conference organized by the Unione Fiorentina and we were so struck by it that we decided to join. Almost for fun, we began to volunteer for the association, until the President of the Unione Fiorentina of the time, former mayor Luciano Bausi (known as one of the Mud Angels during the 1966 flood of the Arno), affectionately asked us if we could help him to reopen the Dante's House Museum which had been closed for renovations since the 1980s… and that's how it all began. This story isn't just a fond memory: it's also an example to all young people of how sometimes a meeting, attending a conference that intrigues us, the will to take on a challenge can change the course of our life.

**D:** How many people are involved in the museum on a daily basis and what are their professional roles (in short, from the cleaning service to the day-to-day maintenance of the building, to those who, for instance, take care of the museum's communication, up until the tourist)?

**A:** Besides the people involved in the direction and coordination of the museum, as mentioned above, other figures central to the museum activity are: the museum operators in charge of the ticket office, bookshop, booking office, guided tours and educational activities; the (external) cleaning company; the (external) company that sees to the electrical, fire-prevention and video surveillance systems maintenance; the (external) agency responsible for all safety regulations concerning the building and the people in it (employees and visitors alike).
As for the museum's communication, I am in charge of it along with the internal staff and, sometimes, with the collaboration of professional journalists, while there's an ongoing collaboration with the company that has developed our website, as it's natural with all the technical updates and implementations we frequently need.
Concerning the museum's staff I feel it's necessary to point out that the role of the museum operator has, in the last few years, the role of the museum operator has significantly changed from the traditional "guardian" or "museum attendant". Simple tasks like welcoming visitors are often carried out, as it happens in our case, by qualified people with college-level education and specialist skills (from historical and literary knowledge to skills connected to technology and web 2.0 development, especially social media).

**Q:** What is the museum's main audience?

**A:** We don't have a target or main audience. It's true that the museum also has an educational function, which makes it quite visited by students of all ages, but the importance and the renown, in Italy as well as abroad, of the figure it celebrates, Dante Alighieri, make it appealing for visitors of all ages and nationalities. The museum's users are thus transnational and cross-generational. On this point, we think it's safe to say something that may sound bold: this museum has always had in its DNA ideas which have become part of our lives, like globalisation and mass tourism, meant here not in a negative way, but as opposed to 19th century-style élite tourism.

**Q:** Who is in charge of educational activities?

**A:** We work with a co-op specialised in managing all educational and tourist activities and services.

**Q:** Over the years, with the museum being privately and not publically managed, you must have faced multiple issues and challenges. Can you tell me more about the issues concerning access to funds and financing?

**A:** Indeed. Actually, as with any coins, this one too has two sides, one good and one less so. Being a private organisation allows for more freedom in choosing our mission and the strategies to reach our goals. This is the upside, while the downside is that we are cut off from public financial support which national and municipal museums, unlike ours, can benefit from.

**Q:** In Italy the laws on safety measures and accessibility are quite detailed. What are the most significant issues you had to face as far this matter is concerned?

**A:** Since 1996, the Italian legislation on safety in the workplace has become more and more detailed with laws and rules received, in some cases, by European directives. These laws are quite strict and aim to guarantee the workers and users' safety. We conformed to the new regulations straight away from the redaction of a Risks Assessment Document and an Emergency and Evacuation Plan, to staff training (in First Aid and Fire Prevention). Moreover, such training must be regularly updated with refresher courses.

**Q:** The museum has gone through its ups and downs, even a fire which was followed by a new arrangement. Then, more recently, you've managed to access funds for a new set-up. What challenges did you have to face?

**A:** The museum's new multimedia set-up, which is still in progress as we speak, is actually a massive project we have been working on for years because we knew that our museum had become dated and that there was an urgent need to restyle it to turn it into a contemporary museum without compromising its soul and identity. It took us four years to make it happen, not on account of the project itself, but because we met multiple difficulties in accessing the necessary funds. We left no stone unturned and made multiple requests looking for sponsors and fundings, but we only received negative answers. In other words, and frankly speaking, we didn't get one cent, but only vague promises. However, making economies and carefully managing the museum's finances, we saved up the resources we needed and today, not without pride, we can say that, relying only on ourselves, we have a museum that's completely new and innovative, a museum that gives its contribution to our cultural heritage (not just in Italy) and represents an extraordinary enrichment for Dante's city.
The refuse of financial support and sponsors is due to several and different factors and it would be impossible, and even arrogant, to pinpoint them all. The thing that most certainly had a part in it is the 2008 economic crisis, which has drastically discouraged private patronage, which, with an understandably defensive attitude, has completely lost its drive and generosity even when it could have afforded big and small donations. Another reason may be that the Italian legislation has yet to develop an organic law-system that could allow companies to financially benefit from donations to culture. Despite the so-called "Art Bonus" law we are still far away from the charity model quite common in the United States, Canada and more.

**Q:** Italy has been brought to a standstill for more than two months because of the Covid-19 pandemic and all structures have remained close. The cultural field, museums included, was among the last to reopen. Keeping in mind that the museum's revenue is mostly connected to ticket and bookshop sales, the damage must have been extensive. Moreover, the pandemic has forced us to reorganize everything, to find new ways to work and experience our heritage. What are the issues that came up in order to reopen after the Covid-19 pandemic?

**A:** The Covid-19 pandemic which, unfortunately, is not yet a memory, has changed everyone's life and, as a consequence, the life of our cultural heritage which, at the moment, is more survival than life. The financial damages have been extensive and they're not exactly quantifiable yet, in Italy and the bigger part of the world. In our particular case these damages have been even more critical because we had already invested all the funds saved up over the years in the new set-up which was supposed to be inaugurated on March 25th, the first national day dedicated to Dante. The lockdown had stopped the works which were already in progress and that is why, if there are no further unexpected occurrences, the museum will reopen to the public in the last week of June, with a three-month delay and remarkable financial losses. Moreover, because of the pandemic, reopening to the public means further expenses to rearrange the visit path in order to maintain social distancing, curtail admissions, sanitizing measures and all that is required by the Italian law to allow the visitor to experience the museum in a safe and enjoyable way. And let's not forget that tourism has received a huge blow, a circumstance that has completely changed the face of a tourism-based city such as Florence. Either way, we are optimistic because just like any other pandemic in history this one too shall pass and the Dante's House Museum, just like any other museum in the world, will soon be crowded with mask-less visitors.

**Q:** How is the Dante's House Museum different from other Florentine museums?

**A:** It's different because of its peculiarities and history, but as paradoxical as it may sound, this difference is the reason the museum is the same or at least a brother to every other museum in the world: places where we can tell stories, move people, teach beauty.

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# *A CASE STUDY – PORTUGUESE HERITAGE CULTURAL MANAGEMENT*

## The Côa ParK Foundation

**Developed by: Claúdia Beato**
**Luís Moreira Pinto**
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## Abstract

This case study refers to the creation and management process of the Côa Park Foundation, which has the largest complex of outdoor Paleolithic rock art in the world under its jurisdiction.

In 1998, Paleolithic art from the Côa Valley was inscribed on the UNESCO World Heritage list after a unique and intricate process of struggle for the preservation of the archaeological heritage identified during works to minimize the environmental impact of a hydroelectric enterprise and its affected area.

The Côa Park Foundation results from the development of the management and dynamization processes of the Côa Valley Archaeological Park, which covers 20,000 hectares, more than 1300 painted and engraved rocks and the Côa Valley Museum, cultural equipment for and interpretation of Côa Valley art and headquarters of the Foundation.

## Brief regional framework

The Côa Park Foundation is based in the municipality of Vila Nova de Foz Côa, in the northeast of Portugal. It includes almost the entire municipality. It covers areas of the municipalities of Figueira de Castelo Rodrigo, Meda and Pinhel.

The municipality of Vila Nova de Foz Côa is a territory of low demographic density, with about 3,300 inhabitants scattered over an area of 61.43 $km^2$, strongly marked by orography and little geological diversity (Baptista, 2009: 34).

The region has a very dense hydrographic network, from which the Douro and Côa rivers stand out. The Côa River is the most important tributary of the left bank of the Douro River due to the size of its hydrographic basin and its water resources (Regalo, 2014: 33).

The climate is dry and hot and with low annual rainfall. There is a predominance of agriculture traditionally based on 3 large monocultures - olive, almond and vine - adapted to these demanding climatic conditions (Rodrigues; Santos: 2011: 104).

## The discovery of rock art prints, the institution of the Côa Valley Archaeological Park and the different management formats

In 1983, during the construction of the Pocinho dam, located in the mouth of the Côa river, the first rocks with rock engravings were discovered in the region, inserted chronologically in the period of the Chalcolithic (Rodrigues; Santos: 2011: 104).

The construction of two more dams was also planned, one of them located next to the mouth of the Côa river, to ensure water reserves for periods of higher energy consumption. In this process an environmental impact study was carried out where some archaeological sites with rock art were identified (Ibidem, p. 104).

In the construction of the Côa dam, archaeological monitoring was being carried out by the Portuguese Institute of Architectural Heritage (Instituto Português do Património Arquitectónico: IPPAR).

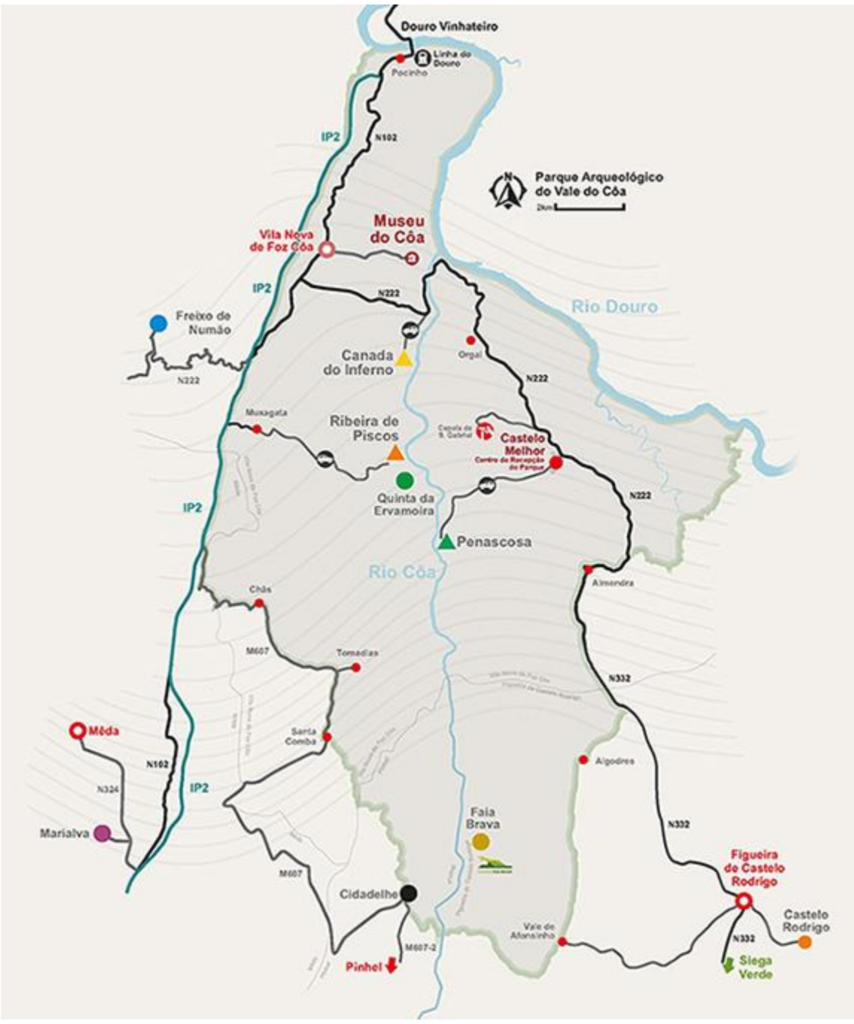


Figure 1 - Map of Côa Valley Archaeological Park
Source: Côa Park Foundation

At the end of 1994, the attention of the international community began to converge on Portugal and the region of Vila Nova de Foz Côa, with the report of the discovery of prehistoric rock art centers, identified during archaeological impact mitigation works. Asset for the construction of a dam on the Côa River and that would be submerged by the construction of this enterprise (Figueiredo, 2018: 35).

The first engravings chronologically associated with the Paleolithic period were identified, in the rock I of Canada do Inferno. With the lowering of the water level at the mouth of the Côa, a relevant number of rock engravings from the Paleolithic period were identified. Às primeiras gravuras dadas a conhecer ao público era atribuída uma cronologia bastante antiga.

The identification of other clusters led IPPAR, an official body that supervised archaeological works, to request an international expert examination from Unesco, which in late 1994 sent one of its consultants to Côa Valley, who had chronologically framed the engravings during the Palaeolithic period. Until almost the end of the last century, Paleolithic art was understood as “an art from the caves, more or less deep” (Baptista, 2006; authors' translation), paradigma que a arte rupestre do Côa Valley veio alterar completamente.

In 1995 there was an intense controversy between the defenders of the construction of the dam and the defenders of the preservation of the archaeological remains.

The news spreads and provokes an intense public debate in the society, causing a sharp debate in favor of the protection of the prints. The dates made to the findings attest to its chronology to the Palaeolithic period. The debate intensifies and appears as a headline in national and international media. Opinion articles, public demonstrations, and debates in the written press and on radio and television programs are multiplying.

Opinions about the preservation of rock engravings and the continuity of the construction of the hydroelectric dam are heated. Defending the continuation of the construction works of the dam was the developer, the municipality and a part of the local population and in favor of stopping the works and preserving rock art was the scientific community, the media, politicians, and citizens from all geographies of the country.

There is an intense campaign in favor of the preservation of rock art centers where a large part of Portuguese society and the media converge and the famous slogan appears, “as gravuras não sabem nadar” (engravings do not know how to swim), inspired by a song by the rap group “Black Company” that was a commercial success at that time in Portugal.

Several national and international experts took an interest in the findings, with an increase in archaeological surveys that revealed increasingly complex rock art. The Paleolithic period focused the world on the case of the Côa valley.

Some of the rock sites are visited by popular people, the media, experts and politicians. At the beginning of 1995, the President of the Republic made a visit to the Côa valley, which became a journey in favor of the defense of engravings. The then President, Mário Soares, expresses his opinion in defense of the preservation of rock art sites in the Côa Valley. The most well-known archeosites and the target of visits are, however, confined with a metallic fence by the developer (Ibidem, p. 115).

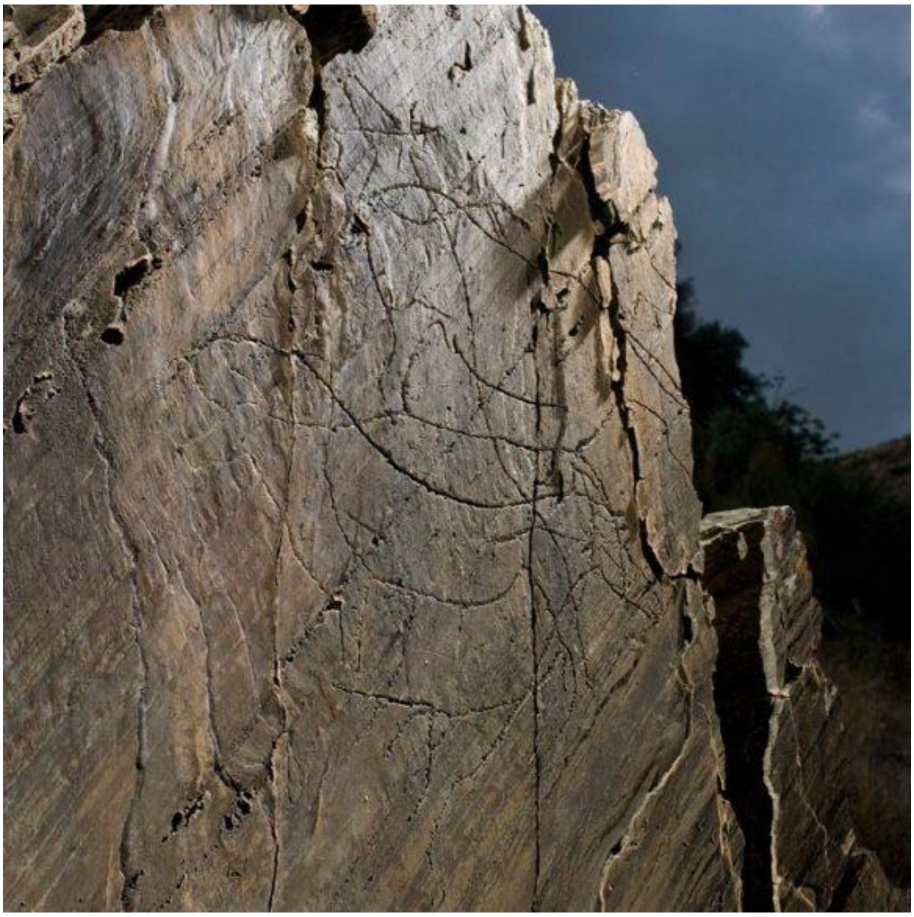

Figure 2 - Rock Art - Canada do Inferno.
Source: Côa Park Foundation

At the political level, the intention is to continue building the dam. As for the findings, it is suggested the creation of an Archaeological Park, the removal of the engravings or simply their submersion, suggestions that were contested by a plethora of archaeologists, in view of the loss of important scientific, cultural, and environmental data associated with the engravings and the prehistoric occupation of that region, damage that could never be recovered given the relevance of the discoveries.

In the municipality of Vila Nova de Foz Côa the population is divided by the economic development dividends associated with the construction of the dam.

The "battle of Côa" becomes the most unique event in archeology at the national level. "The a.C. and the d.C. (from before Christ and after Christ), began to decline in Portugal as before Côa and after Côa!" (Ibidem, p. 116; author translation)

The construction of the dam runs until 1995 and, with the inauguration of a new government (whose Prime Minister was António Guterres, the current UN Secretary-General), the construction of the dam is stopped, and an assessment is made of the importance of the findings.

The safeguarding of this important cultural heritage prevailed and construction work on the dam was suspended.

The beginning of the design of a management model for the preservation and study of engravings and that would foster the economic development of the communities that lived in that territory. In 1996, through a Resolution of the Council of Ministers, the Côa Valley Integrated Development program (Programa de Desenvolvimento Integrado do Côa Valley; PROCÔA) was launched with the objective of creating mechanisms for socio-economic development based on education and cultural tourism of prehistoric and cultural heritage of the Côa Valley.

For this purpose, the Côa Valley Archaeological Park and a rock art research center are created. (Rodrigues; Santos, 2011: 108).

The Côa Valley Archaeological Park (Parque Arqueológico do Côa Valley; PAVC) was established in 1996 and in 1997 Portuguese archeology was reorganized, with the creation of a governing body, the Portuguese Institute of Archeology (Instituto Português de Arqueologia; IPA) and a dependent service installed in Vila Nova de Foz Côa dedicated to the study of rock art, the National Rock Art Center (Centro Nacional de Arte Rupestre; CNART). The management of PAVC is the responsibility of IPA.

With the creation of the PAVC, it was essential to design a management system for the protection, conservation and work associated with the development of communities and the archaeological work to be carried out in this territory (Ibidem, p. 99).

The government promoted the creation of the Côa Valley Development Program (PROCÔA), with the objective of developing a management model with the aim of promoting the development of the region leveraged by cultural heritage, education and cultural tourism, through:

- Enhancement of urban centers and local dynamism centers.
- Streamlining socio-economic initiatives and activities;
- Recovery of rural centers;
- Promotion of tourism activity;
- Potentialization of agriculture and agro-food production;
- Dissemination of studies, promotion of technical monitoring and dissemination of the program (Rodrigues; Santos, 2011: 112. Adapted from Pau-Preto, 2008).

The first funds associated with the PAVC were applied to the creation and improvement of infrastructures, the creation of a youth hostel and the organization of sites and their opening for visits, according to a booking system and with a restricted number of daily visits, in view of the negative impacts that tourism could have on archaeological sites.

In a first phase, 3 centers were made available for visits organized by the PAVC or by authorized private companies. Visits take place with the accompaniment of specialized guides.

In 1998 the Côa Paleolithic rock art is inscribed on the list of World Heritage Sites by UNESCO and is internationally recognized for its exceptionality in the history of Portugal and the World. The process of recognizing Côa as a World Heritage Site was one of the fastest in the history of UNESCO (Rodrigues; Santos, 2011: 109).

At that time, the Portuguese government undertook to build a museum dedicated to the rock engravings of Côa Valley.

Figure 3 - Rock Art - Penascosa
Source: Côa Park Foundation

The Côa Museum was opened in 2011 with the aim of preserving and enhancing the archaeological remains of the Park, a starting point for framing and complementing guided tours of the Archaeological Park.
In 2011 the Côa Park - Foundation was created to safeguard and enhance the Côa Valley, which is the managing body of the Côa Museum and PAVC. Its objectives are based on the management of the Park and the Museum. Its mission focuses on the protection, conservation, research, and dissemination of rock art in the Côa Valley and the promotion of sustainable socio-economic development.

## The inscription of rock art prints from Côa Valley on the list of World Heritage Sites

The integration of a specific heritage in the classification of World Heritage, in addition to the inherent responsibilities on the heritage in question, has an intrinsic socio-economic development of the associated communities.

In 2002, the “Budapest Declaration on World Heritage” was adopted, which focused on four strategic objectives, known as the 4 C's: Credibility, Conservation, Capacity Building and Communication. In 2007, a 5th C was added to the declaration regarding the Communities, emphasizing the importance of the participation of local communities in the preservation of the world heritage (Figueiredo, 2018: 37).

In 1998, the rock art from Côa Valley is included in the UNESCO list as a World Heritage Site based on the following criteria:

I) The Upper Paleolithic rock-art of the Côa valley is an outstanding example of the sudden flowering of creative genius at the dawn of human cultural development.

II) The Côa valley rock art throws light on the social, economic, and spiritual life of the early ancestor of humankind in a wholly exceptional manner (Regalo, 2014: 36 from Report of the 22nd Section of the World Heritage Commission, Kyoto, 1998).

The Côa Valley, which at that time integrated 14 rock art centers and two archaeological sites, was one of UNESCO's fastest processes of classification as World Heritage. In 2010, the archaeological park of Siega Verde, in Spain, is also considered a World Heritage Site as an extension and complement of the PAVC (Figueiredo, 2020: 99).

It is therefore, since that date, a World Heritage Archaeological Park that encompasses territories from 2 countries.

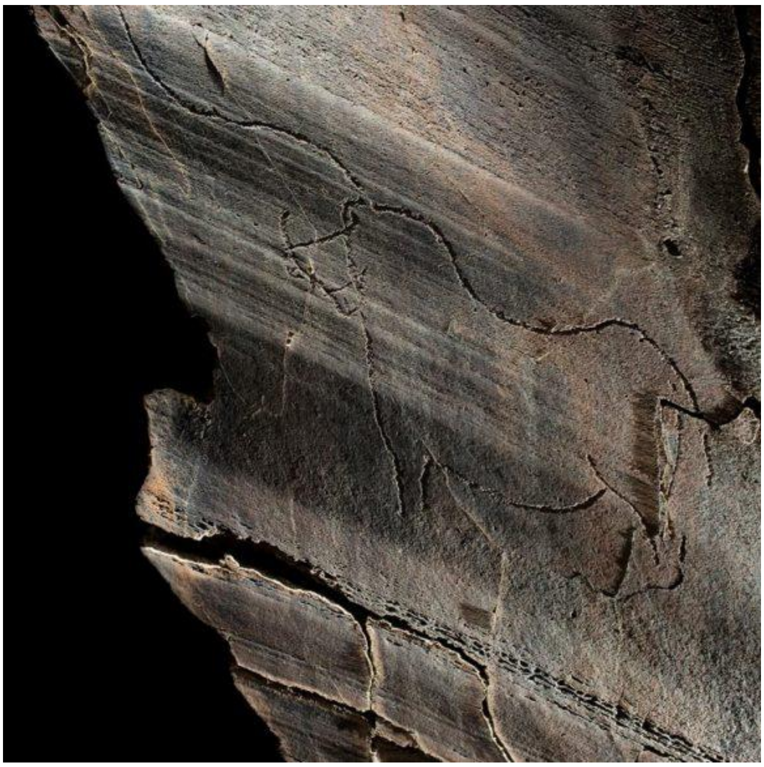

Figure 4 - Rock Art - Ribeira de Piscos
Source: Côa Park Foundation

## The management of the Côa Valley Archaeological Park and the Foundation Côa Park

PAVC was instituted in 1996 and had a legal framework in the following year. The same year saw the installation of the National Center for Rock Art (CNART). Dependents of the Portuguese Institute of Archeology (Instituto Português de Arqueologia), both were based in Vila Nova de Foz Côa.

The creation of the Côa Valley Archaeological Park established an unprecedented legal protection area in Portugal in view of the quantity and location of the rock art panels. They were also classified as National Monuments, the highest property protection category in Portuguese legislation.

In 1998 UNESCO classified the main rock art sites in the Côa Valley, there were 14 rock art sites and 2 archaeological sites (Idem, 2018, p. 35) as a world heritage site, a status that in 2010 was also granted to the archaeological site of Sierra Verde, Spain, as an extension of the Côa Valley.

In 2007 the CNART is extinguished, and the associated researchers came under the administration of the PAVC.

With the opening of the Côa Museum in 2010, the PAVC, which was under the tutelage of the Portuguese Institute of Archaeological and Architectural Heritage (Instituto Português do Património Arqueológico e Arquitectónico; IGESPAR), will be dependent on the Côa Park Foundation - Foundation for the Protection and Enhancement of the Côa Valley da Fundação (Côa Parque - Fundação para a Salvaguarda e Valorização do Côa Valley), it also has the museum under its tutelage.

The Foundation, established in 2011, is a public foundation under private law with administrative and financial autonomy. Its annual budget comes from the founding members, made up of ministries, public organizations and the Municipality of Vila Nova de Foz Côa.
The management of Côa Valley can be divided into four periods:

- Conceptualization and creation of bodies for the study and dissemination of those of Côa rock art;
- Stabilization of structures;
- Budget cuts and the extinction of some of the agencies;
- Financial crisis that affected Portugal; Foundation's financial strangulation

weakness (Ibidem, p. 36).

The 1st Phase, between 1994 and 1996, included the conceptualization and implementation of the bodies responsible for the management of Côa Valley: the Côa Valley Archaeological Park (PAVC) and the National Rock Art Center (CNART). The functions of the PAVC were related to the management of visits to the rock art centers and the CNART to the aspects related to the scientific investigation of rock art.

In a 2nd Phase, between 1997 and 2004, there were substantial state investments, maintaining the existing management model, shared by several institutions in charge and the Ministry of Culture.

The 3rd Phase, between 2004 and 2010, resulted in the dissolution of CNART. PAVC starts to manage the Côa archaeological sites and issues related to scientific research. The extinction, at the same time, of the Portuguese Institute of Archeology (IPA), caused a process of profound changes in the tutelage of Côa Valley, in a first phase for the instituted Institute of Management of Architectural and Archaeological Heritage (IGESPAR), created in 2007 and under the responsibility of the Ministry of Culture and, as of 2012, for the current Directorate-General for Cultural Heritage (DGPC) whose functions, among others, are to protect archeology and material and immaterial cultural heritage.

The 4th Phase corresponded to the opening of the Museu do Côa. As of 2011, the PAVC and the Museum were under the responsibility and management of the Côa Park Foundation.

Figure 5 - Côa Museum

Source: Côa Park Foundation

Throughout these four phases, the management of the territory, the visits, the investigation processes, the functions of the employees of the institutions and the relationship with the community did not undergo substantial changes considering the serious financial problems that the country was going through and the financial strangulation of the Foundation budget (Ibidem, p. 42).

The Côa Park Foundation is currently in a more favorable financial period than the previous one.

Côa Park - Foundation for the Safeguarding and Enhancement of the Côa Valley, has as main objectives:

- "The safeguarding, conservation, research, dissemination and enhancement of rock art and other archaeological, landscape and cultural heritage covered by the PAVC area. [9]"
- the "development of actions regarding the valorization, exploitation and integrated management of the heritage and natural resources of the Vale do Rio Côa, promotion of cultural, artistic, tourist and leisure activities, and other interventions that contribute to economic and social development" [10].
- "to manage the patrimony that is assigned to him, by carrying out an inventory, adopting protective, safeguarding and conservation measures, encouraging the respective investigation and dissemination, without prejudice to the legally assigned duties to the administration of the competent cultural heritage;
- manage and coordinate the Côa Museum and the Côa Valley Archaeological Park (PAVC) and explore complementary resources." [11]

The Foundation's strategic orientation is composed of:

"(I) for the development of scientific and research activities linked to the cultural and natural heritage of the region,

(II) through environmental education and awareness raising activities for different audiences, aiming at the protection and enhancement of water resources, species and habitats that exist in it,

(III) by reinforcing the use of tourist potential,

[9] https://dre.pt/home/-/dre/107535174/details/maximized
[10] Idem
[11] https://dre.pt/web/guest/pesquisa/-/search/279426/details/normal?l=1; authors' translation

(IV) for the creation of new infrastructures and services to support economic development, enabling the settlement of populations, growth, and the creation of wealth, with a view to reversing trends in desertification and population aging, and

(V) for promoting, through all these aspects, the strengthening of the integration and territorial cohesion of the project and its renewed and persistent international valorization."[12]

In 2017, changes were made to the Foundation's statutes to adapt them to the legislation regarding foundations. Among the changes, the creation of an Advisory Council made up of representatives of different institutions stands out; the funding entities were reformulated, and actions were reinforced with the support of higher education institutions.

At the end of 2020, it was determined, through legislation, the elaboration of the Special Program for the Archaeological Park (Programa Especial do Park Arqueológico; PEPA) of Côa Valley. Within 18 months, the General Directorate for Cultural Heritage (Direcção Geral do Património Cultural; DGPC), together with the Côa Park Foundation, will compose the PEPA of Côa Valley, with the aim of establishing "a regime for safeguarding and enhancing the archaeological heritage, territory of the Côa Valley Archaeological Park, and the creation of the systems indispensable for the ordering and management of the respective area".

Among several other objectives, the program should define the "management system for the Côa Valley Archaeological Park area", identify and prioritize the "main projects with an impact on the spatial structuring of the territory and the establishment of a sustainable development model" and promote the "archaeological, cultural, material and immaterial heritage, and landscape as an anchor of the sustainable development model of the territory".

PEPA must be linked "with the landscape design of the Alto Douro and Baixo Sabor Landscape Reordering and Management Program (Programa de Reordenamento e Gestão da Paisagem do Alto Douro e Baixo Sabor, within a framework of integration of the cultural and archaeological values of the classified heritage in Côa Valley, with the new development model for the most vulnerable rural areas, where the aim is to develop a new economy that values soil fitness, reduces vulnerability to desertification and promotes resilience to fire ".

[12] https://dre.pt/home/-/dre/107535174/details/maximized; authors' translation.

The PEPA will have an advisory committee composed of four representatives from the Culture area (DGPC, Regional Directorates for Culture of the North and Center, and Côa Park Foundation), another four from the Agriculture area (General Directorate for Agriculture and Rural Development, Wine Institute of Douro and of Porto, Regional Directorates for Agriculture and Fisheries in the North and Center), three in the area of Environment and Climate Action (General Directorate for Territory, Portuguese Environment Agency and Institute for the Conservation of Nature and Forests) and one from the Territorial Cohesion area.

In addition, it will include a representative from each municipality covered, as well as a member of the Northern Regional Coordination and Development Commission and another from the Center, in addition to a representative from the respective tourism regions.

The University of Trás-os-Montes and Alto Douro will also be represented, as will the Collaborative Laboratory MORE-Mountains of Research (Laboratório Colaborativo MORE - Montanhas de Investigação).

The advisory commission will also have two representatives of cultural and social associations or local development in the region, to be appointed by the Adjunct Secretary of State and Cultural Heritage, with a representative from the Association of Portuguese Archaeologists, one from ICOMOS, one from REN (national energy grid) and member of non-governmental environmental organizations, to be appointed by the respective national confederation." [13]

The Foundation is currently constituted by the Governing Board, the technical-scientific responsible and employees of the Côa Museum and the Archaeological Park of Côa Valley.

The Foundation's team includes about 35 employees, two thirds made up of guides to the engraving panels and researchers associated with the rock art theme and one third made up of administrative, maintenance and other services.

They have different backgrounds and functions: administrative area, human resources, financial area, IT, maintenance, cleaning, or management of the car fleet. Human resources are organized in different areas: presentation to the public, with guides and educational services; research and conservation, with archaeologists; territorial

[13] DGPDC, from of "Diário da República n.º 244/2020, Série II de 2020-12-17" and the "Despacho n.º 12285/2020".

policies, where the aim is to develop and stabilize the special spatial planning and risk management plan and the communication plan, which promotes and disseminates all activities carried out by or with the support of the Côa Park Foundation. (Baptista, 2014: 134; Figueiredo, 2020: 113; 2018: 42).

Figure 6 - Côa Museum
Source: Côa Park Foundation

Figure 7 - Côa Museum
Authors: Beato, C; Moreira Pinto, L; Mota Veiga, A (2020)

In recent years, the Foundation, the PAVC and the Museum have been distinguished with several awards, the result of a meritorious work developed in different areas:

- 2020 - Management and Multimedia Application Award "Augmented Reality Experience", and Education and Cultural Mediation Project, with the project "Education and Cultural Mediation Service of the Côa Valley Museum and Archaeological Park" awarded by the Portuguese Association of Museology (Associação Portuguesa de Museologia; APOM):
- 2020 - Third place in the European Cultural Tourism Network Awards under the theme «Special Interest Tourism development and promotion based on Cultural Heritage»;
- 2019 - Online Communication Award given by the Portuguese Museology Association (APOM);
- 2018 - 1st place in the Iberomuseus of Education award, in partnership with the Vila Nova de Foz Côa School Group.
- 2016 - Vaccea Award, in the Scientific Research and Dissemination category, an award given by the Centro de Estudios Vacceos "Federico Wattenberg", from the University of Valladolid.
- 2011 - Best Site Award, given by the Portuguese Museology Association (APOM).

## The Côa Museum

The Côa Museum was started to be built in 2007 according to the project by Tiago Pimentel and Camilo Rebelo. Contemporary architecture building located 2.5 km from the center of Vila Nova de Foz Côa. The property has four floors and is located at the top of a slope, on the left bank and near the mouth of the Côa river with the Douro River, taking advantage of a landscape of rare beauty that integrates 2 sites classified as World Heritage - the rock engravings of the Côa Valley and the Douro Wine Landscape.

The location and the architectural project are impactful in the theme, in the landscape and in the architectural solutions:

> "Rock Art that uniquely qualifies the banks of the Côa River is probably the first form of Land Art in the History of Humanity. This condition proved to be the driving force behind the construction of the project idea. Land Art is generally characterized in two distinct ways.

In the first, the condition of intervention in the landscape is executed with natural elements promoting continuity, where the geometry of an abstract character imposes itself, highlighting the intervention. In the second, the strategy is to work on a body, specifically designed for a place promoting an intimate dialogue between artificial / natural and thus increasing the thematic complexity of its composition.

In this case, the territory suggests a double reading, as it is the natural support of the landscape, as it is intended to intervene and dialogue, but it is also the consequence of man's intervention in a modeled nature, emphasizing the artificial condition.

Figure 8 - Côa Museum - Entrance
Photograph by Pedro Mendonça

In the case of the Museum, the affirmative meaning of the body seems to be important, both in its reading of intervention in the landscape and in terms of its typological nature, which must be formalized as a physical mass, leaving no ambiguities and misunderstandings regarding its location and content (…)
“(…) The topics covered are diverse, resulting from a dynamic work that seeks to cross external factors, such as topography and accessibility, and factors of programmatic content.
The challenge of merging these factors becomes explicit in the concept of intervention - designing a museum as an installation in the landscape.” (Regalo, 2014: 52, from the Architects 'Descriptive Memory Tiago Pimentel and Camilo Rebelo; authors' translation).


Figure 9 - Côa Museum - Permanent exhibition
Authors: Beato, C; Moreira Pinto, L; Mota Veiga, A (2020)

The architecture project was awarded first place in the category of public buildings in the 1st edition of the International Architecture Award in Baku (2013) and with the Architecture Award of the Douro (2014).
This cultural facility is a museum of archeology and art. It has a museum program dedicated to the cycles of rock art in the Lower Côa and the upper Portuguese Douro (Baptista, 2009: 119) and works as a framework for rock art in the Côa Valley (Figueiredo, 2020: 108).
The museography project was developed by researchers associated with PAVC (Baptista, 2009: 123). With a linear exhibition path, it features 7 rooms, 3 dedicated to general contextualization and introduction to the theme and the rest dedicated to the art of Côa Valley.

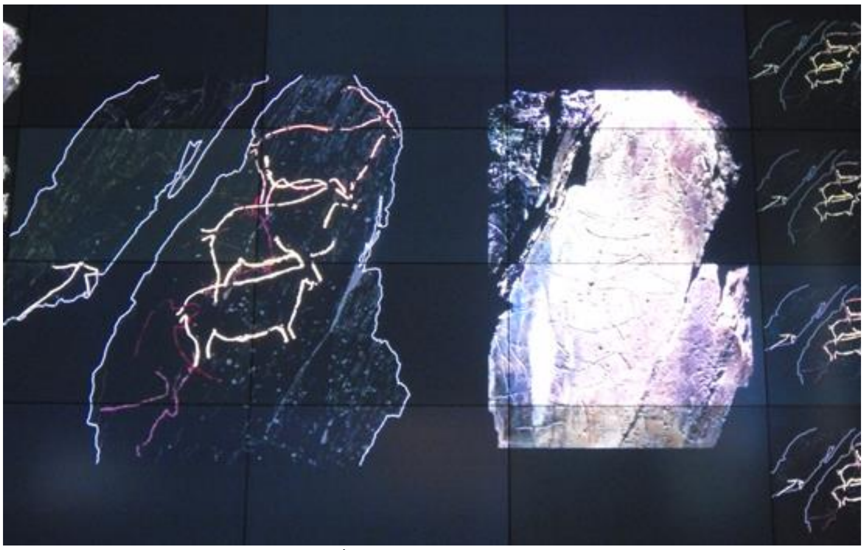

Figure 10 - Côa Museum - Permanent exhibition
Authors: Beato, C; Moreira Pinto, L; Mota Veiga, A (2020)

Integrates the Portuguese Network of Museums (Rede Portuguesa de Museus)[14], an "organized museum system, based on voluntary membership, configured progressively and aimed at decentralization, mediation, qualification and cooperation between museums"[15], "Representing an unquestionable symbol of quality, professionalism and rigor in museological practice", it promotes the appreciation of each museum that is part of it and, at the same time, sustains its strategic strength in the set of museums that constitute it"[16]

In 2019, a reformulation of the museological program and the exhibition discourse was presented with the integration of devices with augmented and virtual reality technology (Ibidem, p. 111), reconciling "scientific rigor with the playful enjoyment of knowledge"[17]. It has 3 rooms for temporary exhibitions dedicated to contemporary exhibitions of painting, sculpture, drawing, photography or engraving, in a happy union between the art of the past and the present.

The museum also offers educational offers through workshops, such as experimental archeology, guided and guided activities by technicians, which include several walking routes to archeological sites in Pre-History, Proto-History, the Roman Period and the Medieval Period, in an integrating and framing perspective of the occupation of man in this territory.

[14]https://arte-coa.pt/wp-content/uploads/2018/09/Certificado-de-Credenciac%CC%A7a%CC%83o-da-Rede-Portuguesa-de-Museus.pdf
[15] http://www.patrimoniocultural.gov.pt/pt/intros/intro-rede-portuguesa-de-museus-home/; authors' translation
[16] ibidem
[17] https://arte-coa.pt/event/inauguracao-da-renovacao-digital-do-museu-do-coa/#; authors' translation

The building also has areas for contemplating the landscape, as a result of its fantastic setting and landscape, auditorium, coffee and dining area, where local and seasonal products are highlighted and is the headquarters of the Foundation.

The number of visitors to the Museum and the Park has steadily increased, from which the years 2018 and 2019 stand out, considering the financial constraints that the Foundation had until 2017 and the consequent difficulties in actively stimulating activities in the Museum and the Park.

In 2019, 50,000 visitors were registered for the first time (Ibidem, p. 113).

In 2020 there was a 20% drop in the number of visitors compared to the previous year, a situation that will have a direct relationship with the Covid-19 pandemic and the mandatory confinement during the first quarter. On the other hand, in the months of July and August there was an increase of 40% and 90% in the month of August in visits to the Museum and the PAVC, compared to the same period in 2019. Surprising number, considering the sanitary conditions caused by the pandemic and given the fact that the Museum and PAVC are in an area of low population density and peripheral nationwide[18].

Since its opening, the Museum has received more than 100,000 visitors. The combined Museum and Park have welcomed more than 615,000 visitors since the opening.

The Museum is today an anchor building in the promotion and attraction of regional tourism. It benefits from its location close to the Spanish border and the Siega Verde Archaeological Park.

## The Côa Valley rock complex and the visitation system

The Rock Art of Côa consists of more than 1,300 engraved and painted rocks, scattered over about 95 nuclei, about half of those with engravings from the Paleolithic period, dated between 30,000 and 12,000 B.P.

The engravings belong mainly to the Upper Paleolithic, but engravings from the Neolithic period, the Iron Age, the Middle Ages, the Modern Age and the Contemporary Age have also been identified.

[18] Bruno Navarro, Presidente da Fundação Côa Parque, em declarações à agencia lusa - https://www.lusa.pt/article/yHvTAXRcVGMwK5nmfuGhYDMSZM5iuSI1/visitantes-do-museu-e-parque-arqueol%C3%B3gico-do-c%C3 %B4a-duplicaram-em-agosto-deste-ano.

There are three visitable sites - Canada do Inferno, Penascosa and Ribeira de Piscos - always accompanied by guides from the Côa Park Foundation or private operators trained by the Foundation, after attending a course in rock art guides.

Visits to rock art centers begin in different locations. Canada do Inferno and Ribeira de Piscos are made from the Museum and the visit to the Penascosa nucleus is made from the Castelo Melhor Reception Center.  They are made by appointment, organized in groups of 8 people, transported in off-road vehicles.

The observation of rock art is difficult. The grooves have the same shade as the rock where the engravings are inserted, and the lighting conditions are factors taken into account for visitations.

Figure 11 - Guided tour
Source: Côa Park Foundation

Visits to each site are made according to the time of day that has the best light for observing the engravings to maximize the viewing of the panels. Visits to the three sites are made at different times of the day: in the morning to Canada do Inferno and Ribeira de Piscos and in the afternoon to Penascosa.

At the Penascosa site, night visits to the engravings are also organized, whose observation is facilitated with the use of artificial lighting.

To help the understanding of rock art panels, since the motifs are engraved, motifs overlap on the same panel and there is wear on the rocks that support the engravings, individual panels sheets were developed. Each card has a graphic survey of each of the rocks and the engraved motifs are represented in different colors (Ibidem, p. 107).

This visitation model is praised at national and international level as a model for visits and for the protection of associated heritage (Regalo, 2014: 42).

Figure 12 - Night Guided Tour
Source: Côa Park Foundation

Another way to visit the rock art centers was developed. With the use of kayaking, visitors can get to know the different sites of Canada do Inferno, Fariseu, Ribeira de Piscos and Vale Figueira in a different way. This visitation system starts at 9 am and ends at 3 pm and includes tasting of regional products.

The PAVC and the extension of Siega Verde are currently home to the largest concentration of outdoor rock art in the world, which translates into an increase in responsibilities and opportunities.

Responsibility for the protection of a multimillennial human artistic manifestation, recognized by UNESCO as a World Heritage Site.

The preservation of this irreplaceable Cultural Heritage must be carried out in a holistic perspective, shared with different intuitions, in cooperation with the Spanish authorities who manage the Siega Verde Site.

Such objectives can only be achieved through continuous work, using multidisciplinary teams. Complex task, if we consider the territorial dimension covered, the broad historical horizon of the associated Heritage, the quantity of rock art deposits and panels, the landscape setting, the communities involved, the strategies and actions of joint awareness about the regional heritage and the scientific works to be carried out, which include archaeological prospecting, studies in different areas and monitoring the state of conservation of the various rock art panels.

This can only be achieved with good management in human resources, logistics, means involved and mediation with the communities involved.

Figure 13 - Landscape seen from the Côa Museum
Author: Mendonça, P (2019)

Opportunities that arise through the holistic perspective that integrates Cultural Heritage and Environmental Heritage, to promote real and sustainable socio-economic development in the territory, with the capacity to promote the self-esteem of communities and instill a sense of belonging to their heritage, there will be capacity to meet the expectations of diverse communities and institutions.

The new museographic discourse, using new technologies of augmented reality, recognition in the areas of education, cultural tourism or scientific research and dissemination, through awards and distinctions, are indicators of a good path, under good practices and in the search for new audiences involved in the development of regional cultural tourism.

The synergies in projects with other institutions, national and internationally apparently different areas, such as cultural dissemination, improved mobility and visits to PAVC, cooperation in scientific projects and the ability to attract private investment are revealing of a direction for the future, with objectives that promote greater administration between public and private services, with a civil society and with schools, in an inclusive perspective.

Bruno Navarro, President of the Côa Park Foundation, speaking to the media on October 26, 2019, has a prospect of hope and optimism in the development of the Foundation's activities in 2021 because, despite the constraints caused by the pandemic, he estimates an increase in revenues Foundation and participation in "various applications for national and international programs and national and international private investment" [19].

[19] https://visao.sapo.pt/atualidade/cultura/2020-10-26-fundacao-coa-parque-espera-alcancar-35-me-em-receitas-em-2021/; authors' translation.

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