

INTEGRATING THE CONSERVATION OF THE BUILT HERITAGE URBAN* SITE INTO THE LOCAL ECONOMIC DEVELOPMENT (LED) POLICY & MANAGEMENT PROCESSES

Outline for an Interface Program

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Abstract. This paper outlines a possible framework for integrating the conservation of the built heritage urban site into the local sustainable economic management and development policy, which constitutes an integral part of the conservation program, where the local authority and community constitute strategic partners throughout the entire process. This interface program is based on urban-strategic planning and local economic development processes and includes: analyzing the conservation factors in the local context, identifying the various stakeholders and interests, predicting possible conflicts, building consensus between the community, organizations and local government, performing economic analysis of the conservation and studying the legal tools needed to manage and maintain the conservation process, both in the short and long-term timeframes.

The primary objective of conservation is to establish a high-quality experiential place that provides a physical manifestation of the "Genius loci" and local identity, through an approach offering – in addition to the actual conservation – long-term economic benefits to all interested parties. In other words, site conservation should generate such benefits as local economic development, employment and revenue-generating opportunities and public and social services to the urban and regional communities and beyond. This explains the emphasis, placed in recent years on the architectural-cultural approach and on the status of the local community, and the various population groups it includes, in the conservation process. This recognition has dictated an attitude and course of action based on an urban strategic planning approach, which physically contains the urban fabric and its various sites, as opposed to the narrow approach that focuses on the conservation of individual buildings or sites. This on-going course of action incorporates the political and professional leadership of the settlement and the local community as strategic partners in all stages of the conservation process and in the management and monitoring mechanisms, as opposed to the narrow approach that regards them merely as providers of services or as beneficiaries of the products of the tourism-economic activity.

In the core of LED (Local Economic Development) lies the notion of encouraging the public, private and civic society sectors to establish partnerships and cooperatively find local solutions to common economic challenges.

Any attempt to accomplish these goals produces a complex work process that addresses planning, social and economic issues, and consequently should include

long-term interdisciplinary activity of various professionals with regard to the following aspects (Shamir-Shinan, Shchory 2011):

- **The strategic aspect of integrating into the urban fabric**, whose implication is the long-term contribution of the conservation process to the development of the local settlement, community and economy.
- **The architectural, design and scientific aspect** which physically means fitting into the residential space and the public areas and about preparing the infrastructure and utility systems required in order to access the site, while adhering to the accepted standards and work processes of the prevailing conservation practice.
- **The administrative aspect, which means maintenance, day-to-day operation and long-term monitoring of the site** for the purpose of ensuring adequate and sustainable conservation through a cooperative effort of all parties.

This gives rise to the commitment to an action plan for managing conservation sites where the local authority and community assume a part of the over-all responsibility, along with the other conservation authorities in charge of the site. This approach has had a declarative manifestation in the international conservation charters* that began to evolve following World War I.

In view of the massive damage inflicted on the Parthenon at the Acropolis in Athens as a result of the detonation of ammunition stored there, the nations of the world convened in Athens in 1931 to discuss the importance of

* "Urban" relates to all settlement types, urban and rural.

international responsibility for monuments, techniques and materials for conservation and the need for international cooperation. The conclusive document of this conference, known as the **General Conclusions of the Athens Conference (1931)**, provided the foundation and guidelines for subsequent international conferences and conservation charters. Those conservation charters evolved gradually through broad international consensus, and embody the principles of conservation and accepted courses of action for intervention at sites of historic and cultural value.

The Venice Charter (1964) stressed the importance of historic values and the environmental context of the monument, provided intervention methods for historic sites and stressed the importance of properly recording the intervention activities.

The Charter for the Protection and Management of the Archaeological Heritage (1990), prepared by the International Committee for the Management of Archaeological Heritage (ICAHM) and approved by the 9th General Assembly in Lausanne in 1990, set the guidelines for heritage management at the regional and national levels. Managing the archaeological heritage is a complex undertaking, requiring efficient cooperation between professionals from numerous disciplines such as research, conservation, development, maintenance, presentation, education, et al.

The Nara Document on Authenticity (1994) elaborated on the subject of authenticity that depends on the local tangible and intangible culture and on the importance of the "Genius loci". In fact, this document addressed the status of the local community in the conservation processes for the first time.

The Burra Charter (1999) presents a concept for identifying heritage and landscape values and for expressing these values through the conservation activities, and points to the fact that the conservation process does not stop on the day when the physical conservation activities have been completed or when the site has been opened to visitors. On the contrary: according to this charter, the process continues indefinitely through the day-to-day management of the site.

For this purpose, the Charter proposes a conservation process that follows a predetermined working pattern that includes the following stages: identification of the place and the tangible and intangible associations, recording all relevant information, assessing the cultural significance and preparing a statement regarding that significance, identifying the obligations arising from the stated significance and studying other factors that may have an impact on the future of the place, including such

future factors as resources, stakeholders' needs, possible restrictions and adequate physical conditions.

The Charter also addresses the development of the conservation policy and reviewing the possible impact this policy may have on the cultural significance and on the management, supervision and assessment strategy. Additionally, the Charter stresses the importance of maintaining the place as a mandatory, on-going activity, of assuming responsibility for management and decision making, specifying the organizations or individuals in charge, including the local authority and community, along with the actual responsibilities, guidance, supervision and professional implementation mechanisms, all while assigning a high degree of importance to proper recording of the decision-making processes.

An in-depth review of international conservation charters over the years suggests a trend of growing recognition of the need to combine the three aspects (the architectural-design aspect, the urban-community aspect and the economic-management aspect) and to include them in the theoretical and professional agenda of conservation.

In Israel, as the approach followed thus far addressed each aspect separately, **the conservation authorities have not yet consolidated a theoretical and practical guidance model that prescribes the implementation of a combined approach on the basis of strategic partnerships and mechanisms and on-going cooperation.** Moreover, it has even been found that in many places where conservation was carried out according to the pin-point, narrow method, with no holistic approach and particularly with no involvement on the part of the local authority and community, the conservation effort encountered severe problems, delays in the implementation of the conservation process or poor maintenance later on (according to the State Comptroller's Report, 2005).

In preparation for the year 2012 that marks the 40th anniversary of the Convention concerning the protection of the world cultural and natural heritage (1972), we emphasize the need for reviewing the role of the local community in the process of being nominated for recognition, the on-going management of the place and the development of public awareness among decision makers at the local level. It is a process that stresses the involvement of the local authority and community and advances the conservation process according to the "bottom-up" approach, which is essentially different from the common trend that begins at the state level and implemented in a "top-down" fashion.

As stated, contrary to the cooperative approach, most Israeli conservation sites are located within the municipal

* Review of the international charters in: Mitrani, K. (2007).

boundaries of the local authorities. However, the development and management of these sites are normally assigned to organizations external to the local authority (the Society for Preservation of Israel Heritage Sites, Israel Antiquities Authority, Israel Nature and Parks Authority, etc.). Detaching the conservation sites, from a strategic, planning and management point of view, from the local development processes reduces the effectiveness of state investments in those sites and often places them in danger of falling to neglect and missing opportunities for exhausting the potential for local economic development as well as for using the site as a source of local-community solidarity. The State Comptroller (*State Comptroller's Annual Report, 2005*) pointed out, in detail, the difficulties that stem from the overabundance of statutes pertaining to and organizations involved in conservation and the absence of a system approach, that make it difficult to implement the **Convention concerning the protection of the world cultural and natural heritage (1972)**.

As a result of the State Comptroller's report and the growing awareness of conservation in recent years, the conservation site development and management issue has become an item on the agenda of the local authorities, without in any way underrating the role played by state organizations and external interested parties that are also responsible for conservation in certain localities according to law. At the same time, on the ground, the local authorities find it difficult to cope with the actual implementation of the conservation process, the management of the conservation sites, and local economic development. The situation is particularly severe at local authorities located in peripheral areas, which find it difficult to advance local development and municipal economy to begin with.

Accordingly, this paper proposes an outline for an interface program – a management action plan – which constitutes an integral part of the conservation program, **where the local authority and community constitute strategic partners throughout the entire process**. The interface program is based on urban-strategic planning and local economic development processes. The joint work and action processes are carried out while assuming the overall local responsibility for the process, through joint management with elements external to the local authority that are also responsible for conservation.

The outline for the action plan is based on strategic management processes for local economic development (Klausner & Shamir-Shinan [1987]; Shchory [2002]; United Nations Human Settlements Programme [2005]; Israel Ministry of the Interior [2008]) **and includes five fundamental issues, as presented briefly below:**

- **Identifying the existing situation:** identification of

the "Genius loci" as conceived by the local community, followed by identification of sites for conservation in the area, their present state, their importance in the local and regional context and the threats and dangers they face. The identification process includes such other local knowledge (*Shamir-Shinan, L. 2006*) issues as identifying trends, the planning policy and statutory programs from the physical aspect, as well as programs and anchors that promote economic and social development. Subsequently, the identification process includes identification and specification of the various stakeholders, including the local community, coordination of activities with the stakeholders, including identification of interests, agreements and possible conflicts and development of a priority system for the various sites within the settlement.

- **Specifying the accepted goals, objectives and projects:** a mandatory prerequisite for success is specifying objectives that are agreed upon by and acceptable to all interested parties, while improving the interrelations between them. These interested parties include the local authority and community, interested parties within the government and the business sector and interested parties that have a statutory function with regard to the conservation of sites. This pertains to the long-term structuring of the conservation processes, including agreements regarding the shared interests identified and dealing with points of conflict, planning of the conservation implementation process, physical and economic development of the sites, development of social and community projects and the integration thereof in the urban fabric. In the long run, an accepted mechanism should be specified for managing conflicts, promoting agreements and updating the program as part of the process of dealing with the tension between development and conservation and dividing the authority and responsibility among all of the parties involved.

- **Preparing work plans, budget-linked to the local authorities, for long-term development and maintenance:** development of the tools (including municipal legislation) and mechanisms required for management and community participation. The plans should be made on the basis of an analysis of the economic cost of applying and implementing the plans and projects for conserving and operating the site, and mainly for long-term maintenance, and on the basis of agreement regarding priorities and financing sources, including budget matching and pooling of resources with other organizations.

- **Assessment, monitoring and control:** preparing a long-term monitoring and control plan for the site, allocating a budget for the plan and obtaining commitment for product assimilation junction points. The monitoring of the sites must be done in cooperation with the local community, which is to serve as the "eyes on the ground" and enable continuous, instant supervision of the site and its state.

- **Management mechanisms:** specifying the managing body and the elements participating in it, including a clear distinction between the policy-making echelon and the executive echelon. Developing action procedures and a mechanism for long-term updating and managing conflicts. **This mechanism should ensure the local partnership and the built-in connections between all of the elements involved in the decision-making process and in the implementation of those decisions, as well as the actual implementation of the comprehensive action plan for the long-term conservation, development and maintenance of the site.**

Conclusion

The management action plan based on strategic management for local economic development is a powerful tool for practical work, enabling effective coping with local problems of simultaneous conservation and local economic development. Outlining a plan along these lines proposes, as part of the urban planning and development process, that the local authority assume responsibility for processes taking place within its jurisdiction through a methodical process of making consensual, joint decisions, focusing on the long-term process of conservation, maintenance, monitoring and conservation management and on solving the problems through a cooperative alliance of all of the elements involved, including, primarily, a continuous, long-term

participation of the local community in all stages of the conservation process, with the community serving as a strategic partner rather than a mere provider of services, as part of intensifying the economic and/or tourism activity. In this way, a practical implementation process takes place which enables the making of creative decisions and the allocation of resources even when such resources (e.g. time, funds, manpower, etc.) are in short supply, including such precious resources as supervision and monitoring by the community and a method for creating competitive advantages that contribute to the local economic development while improving the efficiency of the conservation process.

Leading organizations in the field of conserving heritage sites in Israel have come to recognize the urgent need for expanding the pin-point, individualized conservation site management approach and for adopting a strategic management approach that would ensure sustainable conservation. Several feasibility studies are currently under way to determine the applicability of the system approach proposed herein at several sites that differ in their characteristics in terms of site location, the local community, the local authority, heritage importance, etc. At the same time, the Society for Preservation of Israel Heritage Sites initiated the preparation (currently under way) of a manual listing the stages of the proposed work plan, for the various professionals involved.

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