

A new Systematic Management Approach for transmitting the Spirit of Cultural Heritage Sites

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Abstract: For transmitting the spirit of heritage sites, the site management team shall know their responsibilities; in other words has sound and well defined management plan. PMI (Project Management Institute, USA) has developed two standards as guidelines for managing programs and managing project. Under a MSc. dissertation, the PMBOK (Project Management Body of Knowledge) guide was compared with traditional “heritage sites management” practice, and was concluded that project management approach is applicable for managing cultural heritage sites as a new approach, and the benefits were discussed (Hajialikhani 2006). This paper will discuss that program management, as a new methodology, may be also adopted for managing cultural heritage sites to include all the required activities.

Introduction

Organizations perform work to achieve a set of objectives. Generally work can be categorized as either projects or operations, although the two sometimes overlap. They share the characteristics of being performed by manpower, constrained by limited resources, and also must be planned, executed, and controlled. Projects and operations differ primarily in that operations are ongoing and repetitive, while projects are temporary and unique (PMI, 2004). PMBOK guide defines project as “a temporary endeavor undertaken to create a unique product, service, or result. Temporary means that every project has a definite beginning and definite end, but has lasting outcome. Temporary does not necessarily mean short in duration, many projects last for several years. Projects also may often have intended and unintended social, economic and environmental impacts that far outlast the projects themselves.

PMI introduces programs as a group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually. Programs may include elements of related work e.g. ongoing operations (PMI, 2006), See figure-1.

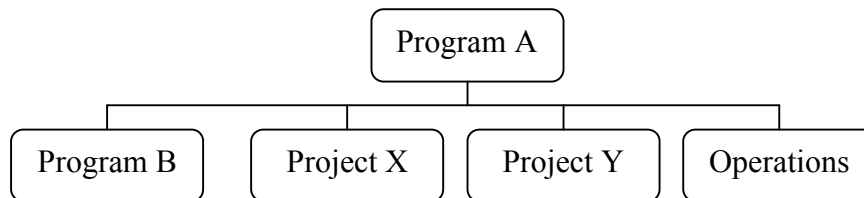


Figure 1- Program, Project and Operation relations

A *cultural heritage conservation program* refers to the set of activities carried out for conservation of cultural heritage sites. These activities may generally be divided into two types:

- **Project type activities:** Some conservation activities may be accommodated within project definition such as renovation of structures that shall be conserved for adaptive use or continuation of present suitable use. The project type activities include study, research, investigation, excavation, removal of debris and earth, and conservation such as preservation, renewal, rehabilitation, prevention of deterioration, consolidation, restoration, reconditioning, adaptive use, renovation, remodeling, reproduction, reconstruction, etc. These activities are done to bring the site to a suitable, acceptable, stable and constant conserved situation and generally have definite start and end.

- **Operational activities:** that are applied afterwards, repetitively and periodically for maintaining the site (such as water proofing the roofs, cleaning the dust, moisture protection), as well as activities for utilizing the site and adaptive uses (like managing the visitors in the site) carried out after completion of the project period (Hajjalikhani 2006).

By comparing the PMBOK guidelines and adding up the definitions presented for project by ISO 10006-2003 for project, with traditional practice of *heritage sites management* for conservation, it is observed that PMBOK guide may not only accommodate the traditional management responsibilities for a cultural heritage site, but also may have more to suggest for a more complete management scheme. The feasibility of applying PMBOK and the benefits of applying has been discussed before (Hajjalikhani 2006), so here we

may just have a summary for introduction and proceed with the proposed scheme.

The common practice for management of cultural heritage is developed and documented as *site management*. Two main references used for the adaptation (International Scientific Committee, 1993), (Feilden and Jokilehto, 1993). This paper is going to propose another approach based on project management knowledge.

Program and Project Management

Program Management is the centralized coordinated management of a program to achieve the program's benefits and objectives, and applies three management themes (PMI, 2006):

- Benefit management: Definition and formalization of the expected benefits that the heritage conservation program is intended to deliver.
- Stakeholder management: defining program stakeholders – individuals / organizations whose interest may be affected by the program – positively/negatively. A cultural heritage site may have various stakeholders such as client, government authorities, sponsors, ICOMOS, environmental preservation organizations, researching institutes, consultants, contractors, final users, local people in and around the site. So standardized methods and techniques of project management may be useful for managing these stakeholders.
- Program governance: develop, communicate, implement, monitor and assure the policies, procedures and practices of the program to achieve the goals.

Managing a project includes identifying requirements, establishing clear and achievable objectives, balancing the competing demands for quality and scope and time and cost, adapting the specifications and plans and approaches to the different concerns and expectations of the various stakeholders (PMI, 2004).

PMI, has developed a procedure for project management, known as *A Guide to the Project Management Body of Knowledge (PMBOK Guide)*. The guide arranges a systematic procedure for management of any kind of projects (i.e. construction, IT, aerospace, etc.), with relevant methods, techniques and tools for a successful management.

PMBOK and its construction extension introduce 13 areas of knowledge as shown in figure 2. Briefly these areas are:

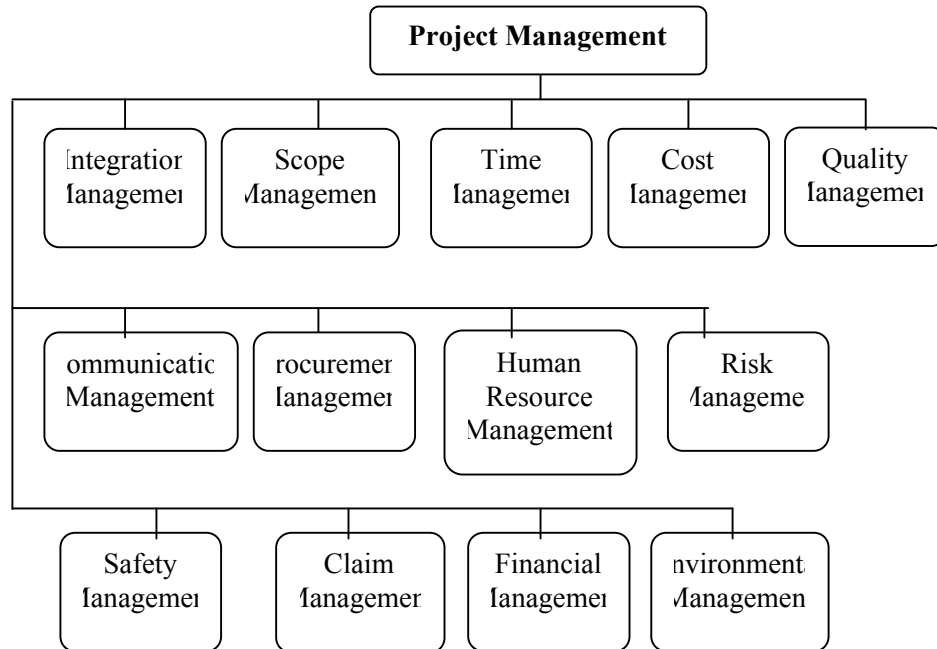


Figure 2- PMBOK Structure for project Management

- Integration Management: Coordinate various elements of project and the changes
- Scope Management: ascertain all and only the work required, to complete the project successfully
- Time Management: ascertain timely completion of the works
- Cost Management: plan, estimate, budget, and control costs, so that the works is completed within the budget
- Quality Management: determine quality policies, objectives, and responsibilities so that the project will satisfy the needs for which it was undertaken (e.g. ICOMOS charters)
- Human Resource Management: organize & manage project team
- Communication Management: Ascertain timely and appropriate generation, collection, dissemination, storage and ultimate disposition of information.

- Risk Management: planning identification, analysis, responses planning, monitoring and control of risks - uncertain events that, if it occurs, has a positive or negative effect on objectives
- Procurement Management: managing purchases or acquire products, services or results and also contract management.
- Safety Management: assure that the works are executed with appropriate care to prevent accidents, injury or damages.
- Environmental Management: ensure that the impact of the works to the surrounding environment remain within the legal permits.
- Financial Management: manage the financial resources, and more concerned with revenue sources
- Claim Management: eliminate or prevent claims from arising and for the expeditious handling of claims if they occur

Alternative Management Scheme for Cultural Heritage Projects

Heritage site management has always a site management plan that guides the manager, but PMBOK Guide introduces 3 major documents to be followed by the managers, which is tried to be proposed accordingly for heritage site conservation projects (figure 3):

- **Project Charter:** authorizes a project and provides the project manager with the authority to apply organizational resources
- **Scope Statement:** States what work is to be accomplished and what deliverables need to be produced
- **Management Plan:** States how the work will be performed and consists of subsidiary plans

As it may be seen, three main inputs are required for developing project charter:

- **Cultural Heritage Organizational Process Assets:** Processes which have been prepared or practiced before in the organization, such as quality assets -ICOMOS and other national / international charters, standards/regulations-, guidelines, templates, cost and accounting control regulation, countries laws and regulations, documentation and communication requirements, organization database for previous and ongoing projects, lessons learned, experiences, records, etc.

- **Statement of work (SOW):** a narrative description of the site and services to be supplied by the site after conservation, which may be submitted by the project sponsor. It may include:

- ✓ Name of site, location, project stakeholder,

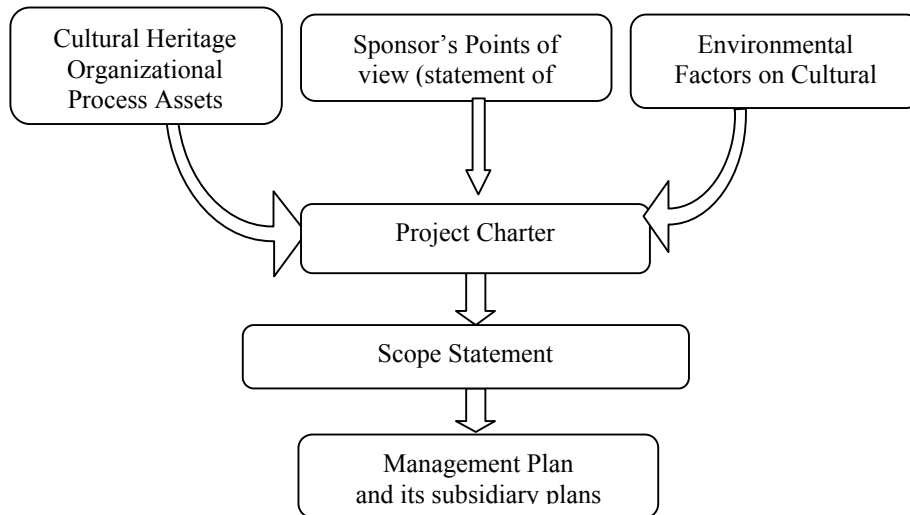


Figure 3 –Project Management Scheme

- ✓ Business needs or legal requirements for the site to be conserved, such as community development, governmental law
- ✓ Scope of work, requirements and specification of conservation activities to be applied to the site
- ✓ estimated size and volume of the work
- ✓ Organization strategic plan
- ✓ Contract between the sponsor and the organization clarifying the rights, responsibilities and commitments of either side.
- **Environmental Factors:** Environmental factors and systems that surround and influence the project's success, such as:
 - ✓ Heritage conserving organization culture and structure
 - ✓ Governmental, tourism, workmanship standards
 - ✓ ICOMOS charters
 - ✓ Available site infrastructure, such as access roads, materials, etc
 - ✓ Existing and accessible required human resources
 - ✓ Available and accessible materials for conservation
 - ✓ Extent of tolerate of each stakeholder against risks of uncertainty
 - ✓ Data available for the similar works
 - ✓ Environmental data - climate, soil, geotechnical, surrounding people culture, erosion/damages by environmental/social factors

Project charter

Project charter address to:

- Management philosophy clarifying type of site and its use, relationship with living communities, type of visitors, carrying capacity and access, security and insurance considerations, visitors services, special considerations to historic towns and urban areas conservation policy as per ICOMOS charters
 - Business needs, and requirements
 - High-level project description and goals, product requirements, specific heritage values of the site to be conserved, fabrics and urban values, historical or mysterious values
 - Project objectives- research, conservational, economical, tourism
 - Project stakeholders and their influences
 - Requirements satisfy sponsor/stakeholder needs and expectations
 - Program of collecting legal documents and regulations
 - Functional organizations and their participation in the project
 - Executing organization chart, team, experiences, responsibilities
 - Specialists and experts helping the management team
 - Summary of main milestones of the project
 - Relation between visitors and local population, improving local economic relations
 - How to improve local economic relations.
 - Cost control policy
 - Organizational, environmental/external assumptions/constraints
 - Justifying the project, i/c return on investment, cost/revenue reports, site utilizations, affect of heritage site on tourism industry, etc
 - Summary of budget, determining source of income or other funds such as investors, grants, donations, Appropriations, etc

Scope Statement

It defines what needs to be accomplished, and documents the characteristics and address to:

- Site boundaries, required conservation activities, associated results and services, methods of acceptance and scope control, view of the project commonly understandable for different stakeholders.
- Objectives, conservation requirements/characteristics, acceptance criteria, method of documentation of site before and after conservation

- Site boundaries, scope of activities to be done, land use plan, cultural values of the site, detailed existing information of the site (cultural, environmental, economical, technological, ...)
- Constraints (detailed), such as national plans, minimum possible changes, alternative plans and activities, surrounding building heights, minimum maintenance, regulations, working seasons, infrastructures, available workmanship, time and schedule constraints
- Assumptions (detailed), such as feasibility study reports, present situation of conservation, environmental and climatic data, estimated project cost, possible organizational technical supports and resource allocations, periodical conservation and maintenances applied
- Schedule milestones such as investigation periods, weather conditions, working and tourist seasons, religious/national ceremonies
 - Organizational and professionals required
 - Approval requirements for implemented activities
 - Collection of basic data and reports about present situation
 - Minimum required conservation measures by considering values and priorities
- Suggestion with least loss, noting limits and obstacles, conservation and protection of cultural resources as a priority.
 - Cost estimate and budgeting
 - Possible risks such, environmental and manmade disasters/force majors, rain, sunshine, erosions, moistures, man-made and budget risk

Management plan

Management Plan includes the actions necessary to define, integrate, and coordinate all subsidiary plans, and defines how the works are executed, monitored, controlled, and closed, and shall include:

- Management processes, method of implementing them
- Tools and techniques to be used for accomplishing processes
- How work will be executed to accomplish the project objectives
- How changes will be monitored and controlled
- Specialist needed and how to administrate them
- How performance will be measured and compared with baselines
- Requirements/techniques for communication among stakeholders
- Developing research and study plan, studying relation between visitors and local population, reporting investigations, studying previous measures
 - Selected project life cycle and the associated project phases

- Key management reviews for content, extent, and timing to facilitate addressing open issues and pending decisions
 - Documentation of procedure for all monuments, buildings, their appurtenances and site views before and after conservation
 - Categorizing and evaluating resources
 - Scheduling the major activities, determine priorities for future measures, developing yearly plans
 - Submission of management plan for approval
 - Sequence and format of periodical reporting
 - Risk register including probable risks, their possible influences, probability of occurrence, possible response to them, etc

Subsidiary plans of Management plan

Added to the above, the management plan shall include below plans:

- Scope management plan: how the management team define scope of works, and do site boundaries, survey of values, document site and the works, determine the activities with minimum interference
- Schedule management plan: describes the method and process of preparation and control of schedule, processes for surveying the problems, priorities, guideline and processes for defining activities
- Cost management plan: describes the format and criteria for planning, estimating, budgeting and cost controlling
- Quality management plan: describes how the management team will implement the conservation quality policy, who with which method and which resources, and when will control the quality, what are the best activities with less interference, and most priorities; the latest and best technologies and method for conservation; criteria, equipment and material for conservation quality
- Staffing management plan: who shall be available and when
- Communication management plan: who and how shall receive which information and report, how to manage stakeholders
- Risk management plan: what are the risks and the priorities and proper responses
- Procurement management plan: which material, equipment and services shall be provided and when
- Safety management plan: how to ensure workers and visitor's safety
- Environmental management plan: how to ensure environmental impacts-environmental, social, economical-of conservation activities
- Financial management plan: how to manage possible revenues.

Conclusion

For transmitting the spirit of the place, there shall be a sound / flexible management plan; sound to be a complete plan to cover all requirement; flexible to cover all aspect of the site. For this purpose, we may utilize program and project management knowledge and techniques as a sound and complete alternative systematic method to manage conservation activities, that may be a well structured plan to be adapted for every unique heritage site.

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