



Sustainable Management of Churches - Conservation Management Plan Guidelines

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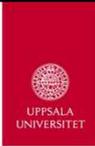


Literature review

The literature shows the need to:

- develop a stronger understanding of the historic environment
- take a long-term view of actions
- achieve greater public involvement in making decisions
- ensure that decisions about the historic environment are made on the basis of the best information possible





Literature review

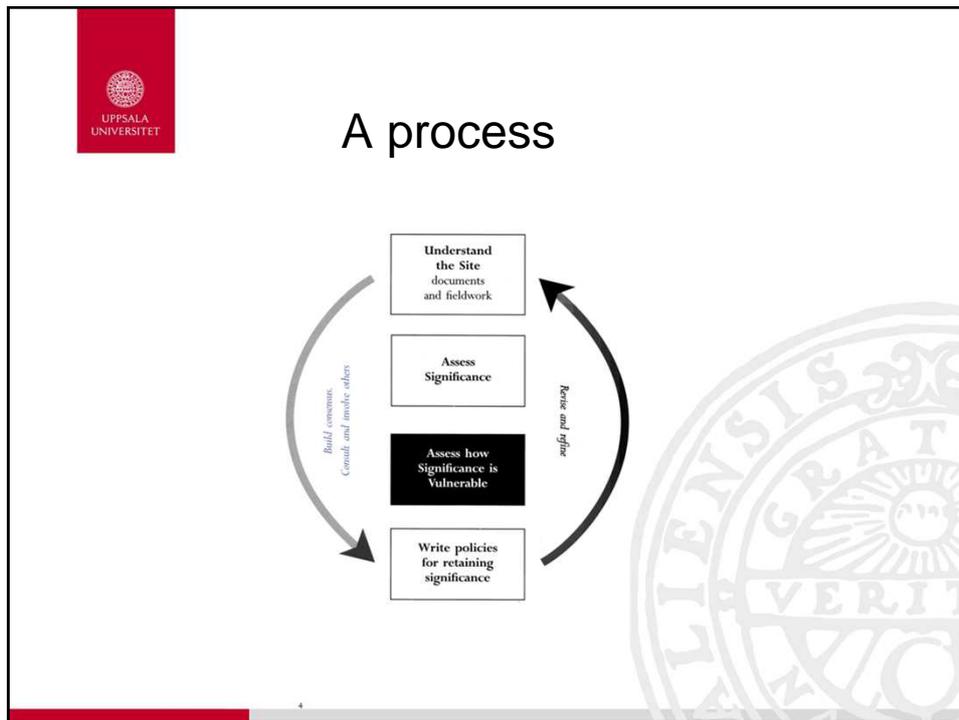
It is clear from the literature that Conservation Management Plans, based essentially on the ideas and framework that emerged from the Burra Charter have emerged as a credible vehicle for the sustainable management of built cultural heritage.

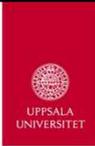
'This has been mainly due to its emphasis on management through, and based upon, why the place was valuable, and to whom, but also the logic that you needed to actively and proactively manage values.'
(Worthing and Bond)



The key principles from the Burra Charter are ;

- that the place itself is important;
- it is necessary to understand the significance of the place;
- there is a need to understand the fabric;
- significance should guide decisions;
- **do as much as necessary, as little as possible;**
- keep records; and
- do everything in a logical order





Ideas from Burra charter:

- Heritage values can help in deciding the most efficient and effective way of managing the heritage asset so as to sustain its overall value to society
- Everyone should have the opportunity to contribute his or her knowledge of the value of places, and to participate in decisions about their future, by means that are accessible, inclusive and informed.
- Understanding and articulating the values and significance of a place is vital – and necessary to inform decisions about its future.
- Significant places should be managed to sustain their values
- Decisions about change must be reasonable, transparent and consistent
- Documenting and learning from decisions is essential



English Heritage sets out suggested steps in conservation management plans :

1. understand the resource and the values that are represented,
2. identify what might degrade or damage the resource now and in the future (its vulnerability)
3. use indicators linked to an understanding of the extent to which the resource could accept change without its significance being damaged
4. use the above information to formulate policies and plans
5. implement effective policies and processes for monitoring the condition of the historic environment



It was also suggested in the literature that any management framework and plan should address the following issues :

- How, and in what circumstances, we might trade off conservation values against others (socioeconomic benefits).
- The extent to which stakeholders are involved in deciding what is valuable and why.
- Acknowledging, and incorporating in decision making, a range of values that are wider than are presently commonly used, and involving a wider constituency in the identification of those values
- Realising the possible benefits of the place for the wider community.



A conservation management plan can be considered to be:
'...a document which sets out what is significant in a place and, consequently, what policies are appropriate to enable that significance to be retained in its future use and development'
(Kerr, 2004, p. 1)



*'...a conservation plan is a tool for managing heritage sites based on the key idea that in order to manage effectively it is vital that an understanding of why the site is significant and how the different elements of that site contribute to that significance are set out, explained and justified.....
A conservation plan is based on the premise that you cannot protect and manage a site unless you know and can articulate what it is about that site that is important (and why).'*

Worthing and Bond



The key elements in a conservation management plan are:

- An assessment and articulation of cultural significance
- The identification of the extent to which the cultural significance might be vulnerable
- The development and implementation of policies and practices which will mitigate that vulnerability and will protect and enhance cultural significance.



A coherent approach will involve:

An identification of:

- cultural values
- the attributes or elements of the cultural 'item' that embody and represent those values – so that it is clear what needs to be protected and hopefully enhanced.
- any factors that may adversely affect cultural values now and in the (measurable) future. Therefore what are the actions that need to be put in place in order to avoid or nullify those threats – or at least mitigate them?
- opportunities to protect and enhance cultural significance – including by proactively seeking out opportunities for positive changes.
- 'where are we now' in relation to such matters as the condition and use of the place.



A coherent approach will involve:

The development of

- a management plan that links the assessment of cultural values to the operational needs and activities of the place and to the objectives of the organisation(s) that own and/or occupy it
- evaluation and review processes that address issues of 'how are we doing' whilst also considering the continuing validity of (heritage) objectives.

CMP – the process:



Stage 1 – The conservation plan

Step 1: Understand the site by drawing together information, including documents and physical evidence, in order to present an overall description of the place and an understanding of how it has developed through time.

Step 2: Assess the site's significance, both generally and contextually and in detail for each of its main components. This will include the site's relative significance (to other places), as well as how each part of the site contributes to its overall significance.

Step 3: Define issues that are affecting the significance of the site or that have the potential to do so in the future – in other words, assess the site's vulnerability to deleterious change.

Step 4: Write a conservation statement – a short accessible summation of what is significant about the site and why (and a description and justification of the sources used and methods adopted in arriving at the assessment).

CMP – the process:



Stage 2 – The management plan

Step 5: Develop conservation policies and processes that will ensure that the significance of the site is respected and retained and, where possible, enhanced in its future management. This will include identifying and appraising options in the light of opportunities and barriers – including the assessment of vulnerability.

Step 6: Apply the conservation policies and processes at all levels of the organisation.

Step 7: Develop and implement policies and processes for monitoring, reviewing and readjusting the management plan.



Conservation Management Plans as a Sustainable Management tool

A CMP can be considered as a tool/ methodology for the sustainable management of built cultural heritage in that it emphasizes the need to:

- Take a long-term view – including a consideration of threats in the future and encouraging plans and processes which mitigate against vulnerability.
- Be holistic in nature and content – in that it sets the historic place in its wider context and integrates issues and concerns.
- Understand a place and articulate and debate its values as a precursor to making decisions.
- Involve stakeholders not just in how the place is managed but also in deciding how important it is and why.
- Manage change whilst protecting that which is valued by society.
- Adopt a precautionary principle approach.
- Be rigorous and methodical in obtaining information and analysing it.
- Demonstrate transparency in decision making.
- Allow decision makers to be held accountable for decisions.

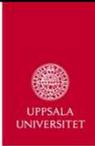


DRAFT GUIDELINES -Contents

SECTION ONE –Overview, context and concepts

Divided into;

- Conservation Management Plans – what are they, why are they important ?
- Conservation Plans as a tool for the sustainable management of built cultural heritage.
- What is (Built) Cultural Heritage – and why is it important
- Conservation – Key ideas and Principles



Section TWO -The **process** of making a conservation management plan (as described previously)

Section THREE - Undertaking a conservation management plan (stage one)

- Understand and describe the place
- Assessing significance
 - Documentary evidence
 - Interpretation of the buildings ,structures and spaces
 - People as an evidence resource.
 - Assessing community and stakeholder values.
 - Categorising cultural values and using value typologies
 - Points to consider in assessing values and significance
 - Process of Assessing significance (and comparisons and relativity)
- Assessing vulnerability
- SWOT analysis –identifying strengths, weaknesses, opportunities and threats



Undertaking a conservation management plan (stage two)

This stage of the plan is concerned with **developing policies** based on based on the assessments of significance and vulnerability from stage one. The guidelines address the following:

- Sequence of developing stage two of the CMP
- Characteristics of stage two of the CMP
- Developing Policies



Developing Policies

The guidelines contain advice on what might be included/ addressed in some key policies . The advice included in the guidelines is explained with this caveat:

‘As observed, the policies contained in any given Conservation Management Plan should be derived from the assessment of significance and vulnerability (and the SWOT analysis) of the particular site. That is, policies will be specific to a time and a place. It is therefore clearly not possible to write standard policies in advance nor to know what the full range of policies that are likely to be needed at a particular site are going to be. However it is possible to suggest that there will certain activities and situations for which policies will be required irrespective of the type of site and the issues emerging from the assessments of significance and vulnerability. A range of the policies that are likely to be needed at any given place are highlighted below followed by some thoughts and advice on what factors and ideas need to be considered when producing the place specific policy documentation. ‘

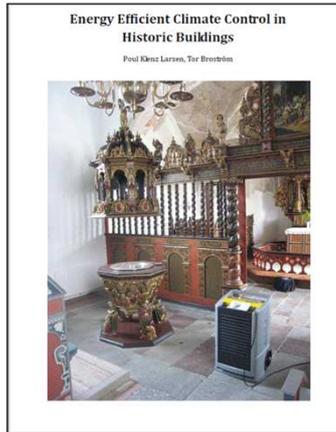


Policies included in Guidelines

- Access
- Conservation
- Energy efficiency and indoor climate
- Finance
- Management structures and processes
- Maintenance management
- Records and archives
- Security
- Use and reuse



Energy efficiency and indoor climate



- Climate measurements
- Climate specifications
- Building physics
- Heating systems
- Intermittent heating
- Conservation heating
- Mechanical dehumidification
- Adaptive ventilation
- Natural climatic stability
- Risk analysis and decision



SECTION Four - Delivering and managing the CMP

- Getting started
- Implementation
- Communication
- Evaluation (monitoring and reviewing)
- Iteration



SECTION FIVE - Appendices

APPENDIX A - Checklist for making an inventory of church buildings and contents

APPENDIX B - Examples of documentary materials for value assessment

APPENDIX C - Official sources of documentary material for churches in Sweden and Estonia.

APPENDIX D - Examples of value typologies

APPENDIX E - Some examples of factors which may affect the vulnerability of the significance of a place

APPENDIX F - An example of a condition survey checklist



Case studies

