

CHAPTER 2

ESTABLISHING A MANAGEMENT PHILOSOPHY

The first step in the care of World Heritage Sites is the development and establishment of a management philosophy. The effort to think through and formulate the principles upon which the site will be administered lays the foundation for all that happens subsequently. In general, two areas of concern must be addressed. The first area is conservation. What are the values of the site that require protection, and how will protection be guaranteed? The second area is accessibility. How can the site be made safely accessible to an appropriate number of visitors, and how can the site's significance be clearly and unequivocally communicated?

To establish a management philosophy requires study, exchange, learning and reflection. It is a planning process, and openness to ideas and possibilities is the key. This chapter reviews the essential elements of the process of establishing a management philosophy in relation to tourism.

Type of Site and Its Use

It is crucial to decide the types of uses that are to be allowed at the site. This is the core of any management plan. The administrative team must begin by considering the type of site it is managing and must acquire a deep understanding of its physical nature and cultural significance. The team must be sensitive to the way the site has been shaped and assembled to achieve specific forms and spatial relationships, and understand that the historic fabric must be preserved unaltered in perpetuity. Given this understanding, planning for the needs of visitors follows smoothly.

If a policy decision is made to provide visitor accommodations on the site, it is imperative that all planning and financial decisions and agreements support the integrity of the site. Final authority with regard to the location and functioning of such facilities must be retained by the site administration.

The site administration should be active in all public planning and land use processes that bear not only directly upon the site but also on areas surrounding the site. It is important to be mindful of all land use categorizations, and all uses that are in the major traffic corridors leading to the site and on all lands that are visible from the site. A site can be easily impacted negatively by uncontrolled, insensitive speculative and commercial development around it. Private developers of visitor accommodations will usually seek the advantage of close proximity to a site and, if possible, maximize the view of the site from their location.

Conservation Policy

A good way to begin developing a conservation policy is to consult the major international documents that have been drawn up over the last three decades to provide guidelines for this purpose. The ICOMOS Venice Charter still provides one of the best guidelines for evaluation, planning and decision-making in conservation work. It was adopted in 1964 at the Second International Congress of Architects and Technicians of Historic Monuments. It has been adapted by some countries such as Australia in their Guidelines to the Burra Charter: Conservation Policy, and in the USA as The Secretary of the Interior's Standards for Historic Preservation Projects.

Yet the need was felt for guidelines that applied more specifically to other than monumental sites, so international specialists worked for 12 years to study and develop another document. This was the ICOMOS Charter on the Conservation of Historic Towns and Urban Areas which was adopted at the 1987 ICOMOS General Assembly in Washington D.C.

All conservation activities must be carefully balanced to achieve a sound conservation policy, and the following factors must be addressed:

A) Protection of the resources from erosion, destruction, damage and alteration due to human action by controlling and limiting the access of visitors to the site.

B) Conservation of the historic fabric through appropriate housekeeping and maintenance activities.

C) Conservation of the historic character by excluding or limiting inappropriate activities within the site.

One of the principal threats to the conservation of sites is the failure to plan for mass tourism, which can, through erosion, vandalism or inadvertent effects, create conditions that accelerate deterioration or even destroy a site. Damage tends to be greater in enclosed interior spaces, but, in reality, no area of a site is invulnerable. The sources of damage are varied and surprisingly uncomplicated: the erosive effect of shoes on historic flooring, pavements and steps; damage to surfaces from grease deposited by hands repeatedly touching or heads repeatedly leaning against the fabric or paper on a wall.

Archaeological sites particularly fall prey to destructive souvenir collectors, who remove bits and pieces of historic fabric as first-hand mementos of their visit. Without planning, certain archeological sites can suffer great damage from repeated trampling. Delicate areas, or areas yet to be fully excavated, should have tour patterns clearly demarcated and roped off.

Materials and finishes located in enclosed interior spaces are particularly vulnerable to drastic humidity and temperature fluctuations caused by the sudden entrance and exit of masses of people who exude enormous amounts of heat and water vapor. All hygroscopic materials -- wood, textiles, some stones, plaster, etc., -- are vulnerable to constant shifts in air quality. The damage from this source has caused the closing to the public of important pre-historic cave sites as well as decorated underground burial vaults. Sometimes, it is possible to open windows to

Case Study: Westminster Abbey

At Westminster Abbey, the most heavily visited World Heritage Site in the United Kingdom, the Dean and Chapter have indicated their decision to do nothing to prevent the damage caused annually by 3 million pairs of feet on the historic floors. UK/ICOMOS conducted a survey of tourist damage to 44 cathedrals and greater churches in 1991. It revealed a serious level of irreversible damage to medieval floors, the obliteration of inscriptions, for which there is often no record, and systematic theft of, and vandalism, to monuments. There are 16,000 people at once in the Abbey at peak times; and there is inadequate supervision, particularly in the Royal Chapels, where many thefts occur. Tourists have attacked the effigy of King Richard II with an umbrella; stolen the crowns from the tombs of Henry V, Queen Elizabeth I and the Countess of Sussex; stolen fingers, hands and feet from some of the monuments; and have removed fragments of the 13th-century mosaic from the shrine of St. Edward the Confessor. Westminster Abbey is not subject to the controls of the Care of Cathedrals Measure, and this distressing situation continues.

promote a more stable environment through natural ventilation, but this adds problems such as an increase in dust deposits, ultra-violet ray damage and potential insect invasions.

Furniture and large objects, which may constitute the integral interior contents of a World Heritage cultural site, need protection from the damage of visiting masses. Like architectural materials, moveable objects can deteriorate from continuous environmental fluctuations. Unless extremely sturdy, historic furniture must not be placed in areas where it will be subjected to use by large numbers of people. Chairs and other seats should be roped, and all other furniture removed from the reach of the hands of visitors. Discreet signs requesting "do not touch exhibits" should be displayed.

As with any other cultural property, collections of small objects and artifacts are subject to environmental deterioration, especially those made of organic materials and of certain metals. Small objects are susceptible to petty theft and must be protected. When installing theft detection systems, management should avoid those systems that require damage to the object through adherence or insertion of detection strips or other elements.

Mechanical ventilation systems, especially those using forced air, are designed to maintain an ideal interior climate. Forced air heating/air conditioning ventilation systems for historic buildings and museums are often designed with sophisticated devices that will control humidity and temperature fluctuations in response to varying conditions inside and outside the building. When the maximum design population of the building is exceeded, the system control ceases to operate properly. If the situation is repeated periodically over long periods of time, both the system and the historic fabric may begin to deteriorate rapidly. In fact, sometimes interior condensation on historic surfaces can be accelerated through such conditions.

For this reason, it is important that heritage site administrators and the site engineering staff consult designers and manufacturers of the ventilation system so that all may clearly understand the limitations imposed on visitation and building population.

Cultural heritage sites are inextricably linked to their surrounding traditional environment. In fact, the environment is often an integral part of the cultural site and contains historic gardens and landscapes. Sites with an unusually large population or with a fragile botanical collection should declare all planted areas off limits, and simply make them visually accessible. The use of fences and other physical barriers, even if largely transparent, must be approached with great caution and restraint, especially if no historical precedent exists for their existence. Too many limitations to physical access aggressively presented can disfigure the character of the site and create a false impression that is unrelated to the true significance of the site. If economically feasible, a few discreet signs and the presence of site guardians are always preferable to the insertion of highly visible extraneous devices to control unwanted visitor wanderings.

Relationship with Living Communities

When dealing with sites that are living communities, the areas dedicated to visitors must be carefully planned. Permanent residents must be given respect. Visitors must not be allowed to interfere with the daily lives of residents nor with their interaction with the site. This is usually accomplished by making areas of the site off-limits to visitors, either during certain hours or all of the time. This will avoid permanent animosities, unflattering comparisons and unnecessary and submissive deformation of traditional behavior, crafts and culture. In historic villages, especially, it is common for the resident community to have limited economic resources. The potential clash of values and behavior between the residents and tourists must be anticipated.

Types of Visitors

World Heritage cultural sites are of significance to all humanity. Still, sites attract specific groups of people for religious, patriotic, professional or other reasons. It is the task of the site management team to provide site access and design tours, exhibits, interpretation programs, and printed information that will fulfill the interests of each type of visitor. In order to do so, the first step is to establish a visitor profile. Who is the typical visitor? Basic socio-economic data -- age, nationality, income, marital status, profession, etc. -- can provide a clear grasp of the typical visitor. (See Section Two, Chapter 4, of this handbook -- "Recording and Analyzing Visitors.")

Sometimes it is difficult to transmit to some sectors of the public the significance of certain sites. Archeological and battlefield sites in particular usually have less visual material and artifacts to permit an easy grasp of their history. Thus a more intense interaction between visitors and guides is required, as well as more extensive exhibits and explanations to make the site tangible. Only through knowledge of the site and visitor targeting can a variety of site interpretation

Case Study: Stonehenge

At Stonehenge in the United Kingdom, the planning application by English Heritage and the National Trust to construct a new visitor center on a green field site about 1 kilometer from the monument itself was refused by both county and district authorities. This proposal involved the creation of new approach roads, the closure of the road that at present intersects the site and parking for 400 cars and 10 coaches. A Public Enquiry is expected soon.

It is generally agreed that 100 visitors at a time is all that Stonehenge can accommodate without causing a deterioration in the experience, quite apart from the impact the site itself. In spite of this, the new visitor center and car and coach park envisioned by English Heritage and the National Trust provides facilities for more than 1,700 visitors at any one time. Even if these are spread over the archeological landscape that surrounds Stonehenge, as is intended, the danger is that this enlargement of the visiting area, and the approach roads and footpaths that are proposed, will inflict even greater archeological damage than at present.

Nevertheless, the requirement of all visitors, except for the disabled, to walk a circular route of approximately 2 kilometers in order to reach the site itself, is likely to limit numbers. The views of Stonehenge and the great Cursus barrows seen while walking towards them give one a sense of pilgrimage lacking in the short approach through a tunnel from the present inadequate car park. If the new visitor center, which is to be the subject of an architectural competition, contains audio-visuals and exhibitions introducing visitors to the history of the site, it may provide a better experience for fewer tourists, and this must be an advantage. It is also the intention to close the road which at present intersects the site and creates an unacceptable intrusion.

experiences be instituted to provide each visitor a clear view of the significance of the site at multiple levels.

The provenance of visitors is also important, especially if large groups are foreigners. They will require site interpretation services in different languages. If visitors are largely from the locality, site-related cultural community programs provide an alternative to involved interpretation programs. For the local young, it is recommended that the site management team work closely with local educators to institute site-awareness programs. After all, the children should grow to be stewards of the site.

It is also useful to know the economic bracket of visitors in order to assess the feasibility of instituting fees for site admission, interpretation programs, special events and other services. Most sites also have small souvenir and information shops whose merchandise must be geared to the consumption patterns of typical visitor groups.

Carrying Capacity and Access

Determining the carrying capacity and level of access for a site is a complicated and sensitive undertaking. The first step is to analyze the site to determine the optimum number of visitors at any one time. This includes a plan to schedule group visits in an orderly fashion. Secondly, the management team must determine site access -- which areas of the site are of interest to the visitor profile groups. These areas must then be compared to those that the management team considers to be of primary significance. Then the team must decide what areas are essential for visitors to see.

The team must then plan for different levels of visitor interest. Some tourists may be satisfied with a cursory visit. Others may desire a detailed interpretation and a comprehensive tour. Some sites may have a consistent attraction for scholars. For each case, the management team must determine the optimal number of visitors allowed in each area at any one time.

The amount of accessible floor area clearly provides the most direct limit upon the number of people who can visit a building site at any one time. There is no specific formula for visitor per square meter of floor space that will yield an exact answer. Spatial considerations, the conservation of materials, safety precautions, visibility and accommodation of children are but a few of the possible conditions that can influence the allowable number of people in one space at one time.

Visits to interior spaces present more difficulties than visits to exterior areas. Consideration must be given to noise level, climate control and security when moving large numbers of visitors through interior spaces. If the areas, both indoor and outdoor, are ample, then the need for a rigid tour pattern is not as urgent. Another concern is the flow of visitors through a site: should the flow be constant or in bunches?

If the site can accommodate more than the current load of visitors, the management team must make a plan to increase the number of visitors and also to determine how they will be managed on the site.

Depending on their nature, some sites lend themselves to unrestricted visiting with little structure and no time limitations. Other sites require more stringent rules that may consist of specific tour routes, group visits in limited numbers, or even the use of a guide to lead, explain and supervise the visit.

All cultural heritage sites must provide tours, either with a guide or be self-guided with the aid of signage, audio cassettes or printed materials. Depending on the site, tours can be optional or obligatory, free or available for a fee. Care should be given in designing guided tours to make sure visitors can all hear and have the opportunity to ask questions. If visitors tend to come in large groups at a particular time of the day, design guided tours of a specific duration. A 30-45 minute wait is about the maximum tolerable. If longer waits are necessary, tickets can be issued for a certain hour, and visitors can then be allowed unstructured exploration.

Tour operators may need to make special arrangements with the site management to prevent a visitor glut. Management must determine policy on the access to restricted areas granted to outside guides.

Security and Insurance Considerations

Visitors must be protected from unsafe conditions that may exist at the site that could result in their injury. The park management must periodically inspect all areas open to the public to assure that safe conditions prevail. Unsafe areas or areas not open to the public must be clearly marked through internationally accepted signage. Areas presenting danger or housing valuable collections should be protected by intrusion alarm systems. In designing tour routes, the safety of the path must be studied: the path must have adequate width and overhead clearance, railings must be provided along significant level changes, steps must be clearly marked, etc. In addition, the effect that visitors will have along the route must be analyzed. Will large numbers of visitors create unsafe conditions that do not presently exist -- such as structural overloads, insufficient fresh air, fire hazards, etc.?

Smoking inside historic structures must be strictly forbidden. It is a fire hazard. Also, the tar in tobacco smoke can cause serious damage to historic surfaces, finishes and collections. In open-air archeological sites and in historic gardens and landscapes, smoking should be discouraged to avoid littering. If smoking is allowed, provide discreet, yet abundant receptacles. Hand-held automatic fire extinguishers should be discreetly located throughout historic structures, and staff should be instructed on their use.

In many countries the admission of visitors to the site makes the site administration legally responsible for the welfare of the visitors. The site administration thus becomes liable for any harm that may come to the visitor. Usually in such societies, the cultural site management has secured insurance policies to cover themselves in the event of such liabilities. These policies often delineate numerous conditions that the site must meet and enforce in order for the policy to be in effect. It is imperative for site managers to study existing policies, and to discuss at length with insurance carriers the extent and type of protection offered by a policy and under which conditions a policy can become invalidated.

Visitor Services

The cultural heritage site must be able to accommodate not only the visitors that come to it, but also the many infrastructure services that are necessary to maintain this floating population. The construction and location of all the elements of visitor services must combine convenience to the visitors with minimal impact to the visual image and the historic character and fabric of the site. Often, the location of these services is a compromise of the two requirements.

Depending on the proximity of a site to services, the administration must make more or less provisions for visitors services. Remote sites need to make arrangements for visitors to purchase meals, and even for overnight accommodations. Providing such services involves the complications of delivery of provisions, laundry services, etc. Similarly, remote site administrators must make sure that all expected services are available to keep the site safe and clean, such as first aid medical treatment, fire-fighting and police service, trash removal/disposal, clean running water, sewer, electricity and telecommunications.

Among the most visually disruptive services that must be provided on a cultural site is that of vehicular parking. Another is the provision of toilets. Both

services are crucial to visitor comfort. The first step in managing both parking services and toilets is determining the need, then deciding on discreet placement.

Tour buses, because of their size, need special shielding of vegetation, landscaped walls, fences or other appropriate elements. If no adequate space for parking can be found convenient to the site, remote locations with courtesy shuttle transportation may be provided.

Large, extensive sites should provide toilet facilities in more than one location, and always in association with restaurant or snack areas. Toilet facilities should have running water and be connected to an appropriate sewer system. Nevertheless, under extraordinary circumstances, self-contained chemical toilet booths, such as those located in construction sites, are preferable to none. Unless designed as individual units, group toilets with banks of fixtures are segregated by sex. Additional facilities should be provided for families with small children and for the disabled. There should be individual units with WC and lavatory, plus sufficient space for wheelchair maneuvers plus an assistant/traveling companion, possibly of a sex different to that of the disabled person. For family-oriented sites, an area open to both parents with counter space for changing baby diapers is a necessity.

Special Considerations: Historic Towns and Urban Areas

The management of urban historic sites is perhaps the most complex of all sites. They are living organisms, often densely populated, with deteriorating infrastructures and enormous developmental pressures. The management of these sites is often fragmented among various local and national government agencies that control the many aspects that allow these cities to function: public services, zoning, public improvements, utilities, demolition and construction permits, land use, etc. The only adequate methodology for managing tourism and preservation in historic towns and urban areas is through the planning process; this will assure cooperation and coordination among all involved agencies.

Usually the promotion of tourism is shared by many groups for different reasons. The site management team must be at the vanguard of establishing the cultural values of the site to avoid demeaning commercialization, damage to the historic fabric and other inappropriate developments. The site management team must meet periodically with representatives from other organizations to discuss the changing needs of visitors and locals. The team must also establish clear limitations on the activities that each agency can undertake inside the town or urban area.

The complexities of managing and preserving historic towns and urban areas are too extensive to be dealt with here comprehensively. There are a few considerations, however, that demand mention. One of the most important has to do with traffic and parking. Vehicular congestion has a large impact on the quality of life of residents and the quality of a tourist's visit.

It is probably best for visiting tourists to be separated from their vehicles before entering the historic zone. It may be necessary to provide adequate surface, or multi-story garage, facilities outside the historic zone. The site management team must negotiate with transit authorities to identify special areas for visitor parking and to establish routes and specific hours that are available for use by tour buses. Clearly defined pedestrian routes and possible shuttle vehicle service should be

provided to move the visitor from the parking locations to within the zone and back again. If any visitor parking is provided within the historic zone, it should be limited and available at a considerable fee to the tourist. In historic zones where new construction or reconstruction take place, provision should be made, if structurally possible, in such projects for underground parking. Generally, such added parking facilities should be available on a priority basis for residents and businesses within the historic zone.

In those situations where a reasonable amount of street parking is available, a system should be adopted that allows property owners and renters to park on a priority basis and to be identified to the authorities through special identifying stickers. Tourist vehicle parking should be limited to specific posted time periods.

It may be desirable to temporarily close streets most frequented by visitors to auto, truck and bus traffic. Any such temporary closure must allow for the quick access of emergency vehicles. Closure can be made with attractively designed moveable gates or metal stanchions.

Generally, large tour and airport service buses should be discouraged from traveling through urban historic zones to pick-up or discharge passengers. They can have a major impact on the physical fabric of the area (especially when turning corners at street intersections), contribute to visual and environmental problems and require large amounts of space. Generally, they should be restricted to defined areas on the periphery of the historic zone. Smaller shuttle vehicles should be used to move hotel guests and tour participants to centralized collection points on the periphery of the zone. If tour buses are to be allowed within the historic zone, they should be restricted in number and confined to specific streets and travel routes. If they are to temporarily park within such a zone, they need to be kept away from historic monuments that can be impacted by the pollution created by their exhaust emissions.

Another area that demands consideration within a historic zone is commercialization. It will be likely that a historic urban zone that is a World Heritage Site will become a magnet destination for international visitors and local area residents. The concentration of large numbers of people will in turn attract other business operators seeking to reach this market with their services and wares.

Musicians, painters, mimes and puppeteers will be among those seeking to entertain visitors and to solicit a donation. To control their numbers and locations for performances, they should be licensed and areas should be defined for their performances. Individuals and groups of musicians performing for extended periods of time and at a loud volume can quickly generate strong opposition to their presence from local residents, businesses and visitors. Some historic urban zones have legally defined sound decibel levels that cannot be exceeded by any performers.

Historic zones can come under intense pressure to convert commercial business properties into restaurant/bars which feature entertainment. In climates where such facilities are often open to the outdoors, the existence of musical entertainment can easily create conflicts with neighboring residential and commercial properties. Local regulations may be necessary to control the sound decibel level of entertainment which can be readily heard on adjoining public streets and private property. There must be a plan; if there is a problem the plan has failed.

Private organizations and public agencies wishing to sponsor festivals, fairs, special exhibits, etc., are likely to want to use large public outdoor spaces in historic areas as venues for their special events. If such events are to be permitted, a set of written operating policies and guidelines should be prepared and available to the sponsors of such events. Guidelines should address topics such as specific hours of access and departure, maximum public attendance allowed, crowd control procedures, security and sanitation provisions, insurance requirements, restrictions on types and locations of temporary structures such as tents and booths, and allowance for placement of temporary advertising signs associated with the event.