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# Heritage Planning Process: An Outlook to the Preservation Maintenance Management

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## Abstract

The concept of maintenance management is an integral part of the heritage planning process that addresses the subject of professional practice. For cultural heritage sites, efficient maintenance management approach is essential in sustainability and avoiding disruptive repair actions, which lead to the collapse of heritage values. Aimed at developing the theoretical framework of maintenance management, this paper discusses various approaches to this concept and then it proposes a holistic and integrated approach to enhance the efficiency of maintenance management in the conservation of the historic site.

Il concetto di gestione della manutenzione è parte integrante del processo di pianificazione del patrimonio che affronta il tema della pratica professionale. Per i siti del patrimonio culturale, un approccio di gestione della manutenzione efficiente è essenziale per la sostenibilità ed evita azioni di riparazione dirompenti, che portano al collasso dei valori del patrimonio. Destinato a sviluppare il quadro teorico della gestione della manutenzione, questo articolo discute vari approcci a questo concetto e quindi propone un approccio olistico e integrato per migliorare l'efficienza della gestione della manutenzione nella conservazione del sito storico.

**Keywords:** preservation, heritage, planning.

## Introduction

Maintenance is considered to be the most practical and philosophically appropriate conservation method (Bond and Worthing, 2016; Forsyth, 2013) and there is a mutual recognition that maintenance is a fundamental process in the conservation of historic buildings. However, fewer studies focused on the different approaches that should be taken towards maintenance management. To date, Systematic maintenance still acknowledges as the common sustainable way of conserving heritage buildings (Dann and Contell, 2007). However, this approach may be deficient when it comes into abandoning heritage sites (Shirvani Dastgerdi and De Luca, in press-a). In cases, heritage has not been only a treasure and an indicator of cultural identity, but it is also a heavy burden on the local community, as it needs significant funds for maintenance or restoration, funds that are never adequately or continuously available (Shirvani Dastgerdi and De Luca, 2018a). Therefore, to incorporate cultural heritage sites in contemporary life, the question arises how maintenance management is enabled to turn a decaying heritage into an active one, conserving its cultural values? By discussing different approaches, this paper attempt to develop an active maintenance approach in the management of the historic site.

## Maintenance approaches in the twentieth century

The notion that maintenance of the cultural heritage is a significant and notable action goes back to the Ruskin's quote "Take proper care of your monuments, and you will not need to restore them" (Ruskin, 1849). According to the Burra Charter (ICOMOS, 1979) maintenance is "the continuous protective care of the fabric, and is to be distinguished from repair". The Society for the Protection of Ancient Buildings (1987) set out some principles to be considered during repair and maintenance activities to historic buildings. These remain a practical guide to conservation principles and include honesty, recording, reversibility, the need for research, repair above restoration, fitting the new to the old and authenticity.

Feilden and Jokilehto (1993) defined the concept without a difference between maintenance and repair activities. According to them "maintenance, is a continuous process that includes all practical and technical measures that are needed to keep the site in condition at a standard that permits enjoyment of the cultural

resource without damage". Holms (1994) recommends that planned maintenance can be considered in two forms; independent and dependent. Condition-independent maintenance, which is also termed 'cyclical maintenance', needs no pre-inspection and manages to be work that is undertaken periodically, i.e., external painting and plant growth. Condition-dependent maintenance happens when a component or part is assessed through inspection or a condition survey and the action to repair or maintain it is subsequently prioritised. Whether such intervention is carried out to avoid collapse timely, it could be termed 'planned preventative' maintenance. Indeed, a management system based on condition-dependent maintenance is the more complex and resource-dependent, as it needs management and monitoring of site condition, sufficient information collection, and the development of an approach that involves in the decision-making process.

### **Gubbio Charter and concept of historical territory**

The first Charter of Gubbio (1960), produced in Italy at the end of a congress treating with "Safeguarding and rehabilitation of the historical and artistic centres". At the end of the Congress, the Charter was signed, and the National Association of Historical Artistic Centres (ANCSA) was founded. The charter states priorities and intervention categories; new consideration is also stated regarding the social structure and care for the maintenance of communities and economic activities within the settlements. However, The experiences of a decade of urban renewal interventions were not completely positive. Historical towns were threatened not only by the speediness of transformations but also trusted in planning begins to waver. The second Charter of Gubbio (1990) marks a moment of progress in the disciplinary debate around the theme because the policies being proposed have seen as the right answer, especially the territorial network policies. The most relevant concept introduced in the new Charter is that of historical territory, global expression of cultural identity and the subject in all its parts (existing city and periphery, built landscapes, rural land) of an organic action strategy. Therefore the concept of the historical territory has appeared from simply classifying or delimiting needs, and stops being considered as a "zone" in a conceptual sense; now it lives and has relationships with all other territorial components. Further, its value represents an identity resource, as well as a cultural one (Lazzarotti, 2014).

### **Preventive maintenance**

The preventive maintenance approach is based on specifying the heritage values that can be updated periodically (Dann et al., 1999). Also, it includes early identification of possible actions, which are recognised through periodic observation and monitoring processes, in order to diminish or avoid major interventions that require significant funds (Garcia et al., 2014).

### **Identifying values**

According to Kalman (2014), value is a characteristic that is valued in itself. Values change over time because society is continually in the process of revising what it values. It follows that different parties may hold different sets of values to a historic place or may assign different weight to the same values (Seirafian Baboldashti et al., 2018).

**Table 1 / Summary of heritage value typologies devised by various scholars and organisations.**

<b>Scholars/ organizations</b>	<b>Value typologies</b>	<b>Description</b>
Alois Riegl (Riegl, 1903)	Intrinsic (memorial)	Age, Historical, Commemorative.
	Temporal (present-day)	Use, Art value, Newness, Relative art Value.
English Heritage (1997)	Evidential	The potential of a place to yield evidence of past human activity.
	Historical	The ways in which past people, events, and aspects of life can be connected through a place to the present.
	Aesthetic	The ways in which people draw sensory and intellectual stimulation from a place.
	Communal	The meaning of a place for the people who relate to it.
Burra Charter (ICOMOS, 1999)	Aesthetic	The same as Architectural value.
	Historic	Having a remarkable history.
	Scientific	Describing educational value.
	Social (or spiritual)	The qualities for which a place has become a focus of religious, political, national or another cultural sentiment to a majority or minority group.
Randall Mason (Mason, 2002)	Sociocultural	Historical, Cultural, Social, Spiritual, Aesthetic.
	Economic	Use (market), Non-use (non-market), Existence, Option, Bequest.

An important factor about heritage values is that they are contingent, not objectively given. The values of heritage are not merely found and fixed and unchanging, as was traditionally theorised in the preservation field (Table I). Values are produced out of the interaction of an artefact and its contexts; they do not emerge from the artefact itself (Mason, 2002).

### Assessment of cultural significance in the historic site

Significance is a synthesis of values. The degree of significance determines what, if any, protection, including statutory designation, is appropriate under law and policy (Figure 2). Determining heritage significance is usually undertaken by assessing the values of a historic place against a set list of criteria for determining whether the place has sufficient significance to be formally recognised. Most jurisdictions have their lists of criteria for determining significance.

Repair tasks are necessary for an extended period. However, in most cases, the repair will entail restoration or reconstruction and accordingly, needs to be treated with attention. Although the primary aim of maintenance is associated with the protection and management of the physical asset, however, the overall aim is to maintain cultural significance. This asset should be understood as a resource that can be managed proactively in order to respond to the needs and demands of the users and stakeholders. Therefore, effective maintenance is a process that can maximise the potential of the heritage resource by conserving and enhancing the asset, but the maintenance management activities need to be strategic, proactive and integrated (Bandarin and van Oers, 2012).

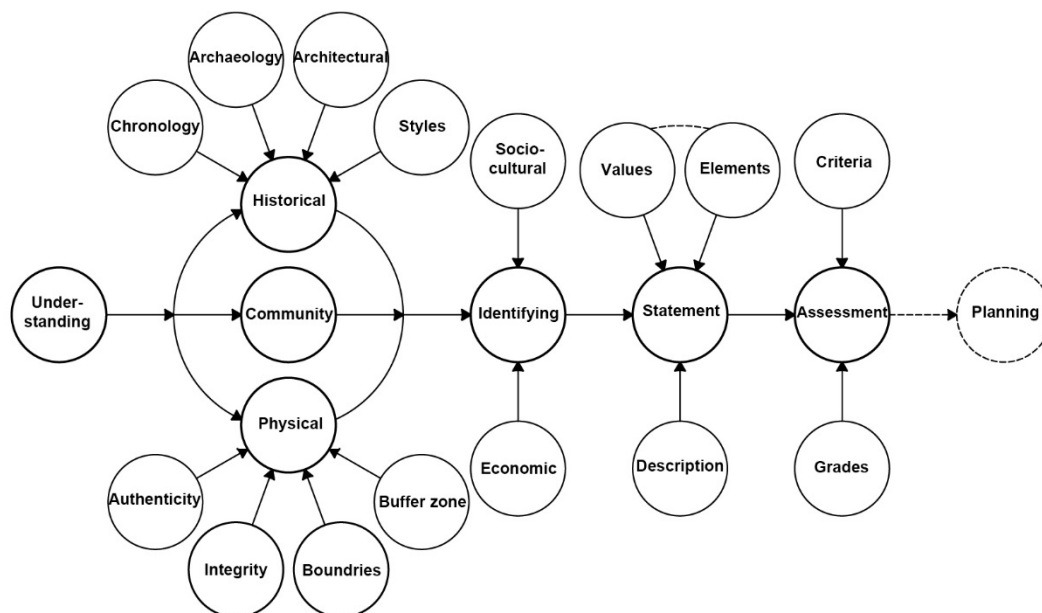


Figure 2 | A framework for determining the significance of the historic fabric (Shirvani Dastgerdi and De Luca, 2018b).

### Systematic maintenance

The Venice Charter states “it is essential to the conservation of monuments that they be maintained on a regular basis” (ICOMOS, 1964). The Principles of the Conservation of Historic Buildings (1998) states that “systematic care based on good housekeeping is both cost-effective and fundamental to good conservation”. Systematic maintenance is significant to the continuation of heritages (Dann et al., 1999). It involves fewer repair tasks carried out to building components in order to conserve it in a proper condition, and this will require significant organisational and managerial expertise (Cristina Heras et al., 2013).

### Continuity of the function

For the maintenance of the majority of buildings, the difference between repair, restoration and improvement will not be conceptually significant. However, for historic buildings these definitions, in terms of the actions which should follow for the continuity of the function, are of considerable importance. The continuity of the function of historic buildings supports the cultural significance of the historic site which must be retained maximally (Kalman, 2014).



*Figure 1* | When heritage becomes a heavy burden on the local community

### **Developing the Maintenance Framework**

The revival of the cultural heritage must be recognised and implemented in the spatial, urban, and landscape context (Bandarin and Van Oers, 2014). The cultural heritage should be recognised as a resource and it should be analysed as a driver of economic development in contemporary life as well as a catalyst for regional development (Shirvani Dastgerdi and De Luca, in press-b). The strategy to actively manage heritage should be adopted, in order to qualify sustainability and maintenance, but also to bring benefit to the local community and stakeholders using the cultural heritage. The context affects the heritage and its revival, and the new function of cultural heritage should be stimulating and developmental for the territory.

Another necessary condition is the existence of a strategic and operative direction that assists in organising the local authority and resources to the different development objectives. It provides an evaluation system of the public policies that support the management and challenges related to the maintenance management of cultural heritage at different levels (Mayntz, 2001; Prats, 2003; Rhodes, 1997; Shirvani Dastgerdi and De Luca, 2019, in press-c). In developing the strategies, tasks must be done jointly with all institutions involved in heritage conservation. Cultural heritage maintenance needs the elaboration, and the application of documentation tools through a collective, non-individual, work in which the integration of territorial actors is fundamental, and each will be in charge of activities and responsibilities depending on their competencies and their capabilities. Therefore, the maintenance management requires the integration of all the economic, social, regional and cultural development strategies (Alberts and Hazen, 2010), where the participation of the different territorial actors is the resolution of these public policies to and improve the maintenance management and guarantee the sustainability of cultural heritage site. Besides, Proper financial and legislative principles should be affirmed at the national and regional levels to ensure sufficient funding of heritage revival and improvement.

### **Conclusion**

The heritage should be understood as a resource and driver of economic development in the territory. In this sense, a practical maintenance management approach is necessary for the sustainability of the buildings and avoiding the demand for possibly costly and disruptive repair tasks, which may damage the buildings' heritage value. Such an approach cannot be significantly practical except the organisation has a clear understanding of heritage value, a wise strategy for the cultural heritage within its conservation, and a commitment to enhancing it. The mandatory and committed participation of the community in the whole process should be emphasised. In the maintenance management process, the participation of all public and private actors must consider actively and throughout the entire preventive conservation period, from begin of the project to the control, monitoring and evaluation stage. In the beginning, the roles of each of the territorial actors must be clearly defined based on the capabilities of each collaborator. Maintenance

management needs a progression from identification to evaluation as a basis for policies. The identification of values and the determination of significance are only means to a more fitting end. That end is the management of change within a historical site in a manner that retains its values and respects its cultural significance. Also, an integral approach should be affirmed with a comprehensive view of the heritage, together with its accompanying territory. The maintenance management and enhancement of cultural heritage form a burden on the local community to an engine for development at the regional scale should be based on creativity, respect for authenticity, and innovation in planning, and managing the cultural heritage sites.

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