

Comparative Heritage Management

Day(s): Monday & Wednesday

Time: 9:00am-11:00am

Date: Term A (1/16-3/2)

Office hours by appointment Monday & Wednesday 11:00 – 14:00

Carolina Castellanos

email: ccastellanos@gmail.com

Course description

This course examines a range of heritage/site management systems, from the US and abroad, to enhance student skills related to the development of values-driven site management policies and context-appropriate practices. There is growing awareness in the heritage field regarding the need to balance social, economic, and environmental considerations to ensure effective and sustainable heritage stewardship. However, the conservation toolbox available to practitioners is still limited. This course will help to advance understanding in this area by introducing students to approaches that have been used in a variety of contexts, allowing them to apply these ideas to study cases through their coursework.

The main objectives of the course are to:

- Examine the range of management systems that exist in the US and in the international context and understand planning models for various types of heritage places.
- Enhance student skills related to the development of values-driven heritage management policies and context appropriate practices.
- Explore methodologies/ approaches and improve professional skills in the design of management systems.
- Contribute to efforts to strengthen communities of practice.
- Review existing literature and documents (charters, code of practice) that attempt to standardize heritage management practice to promote critical thinking about management approaches and their effects and stimulate creativity in the application of models.
- Be able to engage in a significant dialogue with diverse interest groups, associated with heritage, to develop management proposals that are culturally adequate, respectful of a multiplicity of values and that contribute to sustainable development.

Course format

The course is designed to include lectures, case studies, participatory discussion around readings, and student presentations.

Each student will select a case study to work on throughout the duration of the course to apply theoretical concepts. The expected outcome of the course work will be the outline design of a management system for the selected case.

Cases will provide a rich context for discussion by exposing many of the problems and issues being faced in the practice of heritage management and the pressures and challenges that can be faced in the design of a management system. In class partial presentations will be used to facilitate discussion and demonstrate how different factors affect decision-making in heritage

Course Schedule

Wednesday January 17

Session 1

- Course introduction
- **Overview of the development of heritage management in the United States and at the international levels**
 - *The evolving notions of “heritage” and its relation to charters and standards*
 - *From conservation planning to adaptative management and management systems*

Monday January 22

Session 2

- **Overall review of approaches and processes for the design process of heritage management systems**
 - *Planning processes: phases and components*
 - *Managing for change: adaptative management and management effectiveness*
 - *Management systems and operational tools*
 - *Management of traditions: challenges in integrating tangible and intangible values*

Wednesday January 24

Session 3

- **Designing a management system: basic foundations of the design process**
- Documentation in heritage management*
 - *Goals and purposes of documentation in the context of heritage management: choosing appropriate tools and methods.*
 - *Importance of systematic documentation: basis for analysis, consequences of undocumented projects (deficient design, poor use of resources, duplicity of tasks, etc.).*
 - *Adaptation of study and documentation components according to specific planning contexts.*
 - *Assessing what exists and what needs to be produced in regard to documentation during the planning process.*
 - *Uses and users of documentation.*
 - *Management of documentation during the planning process and implementation of the plan.*
 - *Introduction to methods and tools for documentation: appropriateness for the planning context (availability of financial, material and human resources).*
- **First group of class presentations: general introduction to student’s case study**

Monday January 29

Session 4

- Designing a management system: basic foundations of the design process (cont.)

Assessment in heritage management

- *Correlation between study and documentation and assessment: importance of sound documentation as the basis for appropriate assessment, importance of material documentation in condition and significance assessment.*
 - *Correlation between context assessment and significance and condition assessments: integration of components and relationship to the response phase.*
 - *Components of the assessment phase: Significance, condition assessment and context assessment*
 - *Integration of assessments*
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- **Second group of class presentations: general introduction to student's case study**

Wednesday January 31

Session 5

- Value-driven planning applied to the design of heritage management systems

- *Theoretical evolution and development of values-based approaches*
- *New approaches in exploring and document values and incorporating them in values-based management practice*
- *Value assessment processes, categorization and interactions and bringing values into management processes*

Monday February 5

Session 6

Designing a management system: basic foundations of the design process (cont.)

Response in heritage management

- *Communicating visions and building consensus.*
- *The quality of policies.*
- *Critical components of a management plan: adaptation to specific contexts.*
- *Methods and tools for the development of the response.*
- *Components of the response phase: Vision, Policies, Objectives, Establishment of strategies and responsibilities, Definition of management strategies*
- *Development and implementation of an action plan*

Wednesday February 7

Session 7

Designing a management system: monitoring, review and adaptation

- Monitoring systems and indicators.
- Information review and analysis.
- Adaptation of management plans.
- Monitoring tools: management effectiveness

Monday February 12

Session 8

Value-driven planning applied to the design of heritage management systems

- *Interlinkages of cultural values and natural values; tangible and intangible values, interests and identities*
- *Heritage significance and multiple narratives: multiplicity of values and the role of stakeholders*
- *Political dimensions and commodification of values*

Wednesday February 14

Session 9

- Designing a management system: working with participatory processes

- *Participation in the design of management systems: working with local communities and stakeholders*
- *Engagement and empowerment of local communities*
- *People centered approaches: creating structures for meaningful and sustained participation*
- *Linking conservation and sustainable development*
- *Working with contested values, conflict and change: conflict resolution and trade-offs*

Monday February 19

Session 10

Designing a management system: governance and policy frameworks

- *Understanding components of governance frameworks and how these relate to heritage management systems*
- *Types of governance regimes and how they operate across heritage places*
- *Principles of quality governance for heritage management systems*
- *Facilitating dialogue and negotiation with different stakeholders in the definition of overarching governance and policy heritage management frameworks*

Wednesday February 21

Session 11

Designing a management system: governance and policy frameworks (cont).

- *Current challenges: rights-based approaches, shifting international policies and legal frameworks, on-going debates and key instruments at the practical level*

Monday February 26

Session 12

- Student's case study presentation

Wednesday February 28

Session 13

- Student's case study presentation

Monday March 5

Session 14

- Course conclusions and final discussions

Suggested outline for the case study

1. Introduction to the heritage place
2. Significance of the heritage place
3. Synthesis of conditions currently affecting conservation and management
4. Proposed management system
 - General policies
 - Governance framework
 - Overarching objectives
 - Specific objectives
 - Operational framework
 - Monitoring and evaluation mechanisms