

Conservation Planning

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Introductory Remarks

This presentation will depend heavily on several very important documents:

1. China Principles (ICOMOS China, 2000).
2. Conservation of Historic Towns (ICOMOS, 1987).
3. *Conservation Plan* (James Semple Kerr, 5th edition, 2000).
4. The Management of the Historic Environment (ICOMOS UK, undated).

Challenges

1. Balancing *conservation* of cultural heritage (both tangible and intangible) and *development*.
2. Balancing *community sustainability* and *tourism*.
3. Retaining *inherent characteristics* - the character of sites and precincts.
4. Demonstrating *economic viability*, especially in the long-term.

The Eight “General Principles” from *China Principles*

1. Principles can serve as *guidelines* in conservation practice for both historic sites and historic precincts.
2. The purpose of the Principles is to ensure *good conservation practice*.
3. The significance of a site or precinct is determined by its *historic, artistic and scientific values*.
4. Sites and precincts should be used in a sensible manner for the *benefit of the community*.
5. Conservation should be done in a *sequential manner*.
6. *Research* is fundamental to all aspects of conservation.
7. *Verifiable records* should be maintained with care.

8. A sound, independent, and permanent *organizational structure* should be set up.

Conservation Plan: Part I (*Vision*)

Phase 1: Investigation and Research (*Vision*)

- Initial identification.
- Initial collection of documentary materials.
- Survey.
- Inventory.
- Mapping.
- Selection of sites and precincts to be investigated in detail.
- Selection of sites and precincts to be more fully recorded.
- Further collection of documentary materials, especially materials relating to sites and precincts chosen for detailed investigation.
- Interviews with owners, tenants and those known to be associated with sites and precincts.
- Careful observation of community use patterns.

Phase 2: Assessment (*Vision*)

- Establish the historical, artistic and scientific values of sites or precincts targeted for detailed investigation.
- Establish the socio-cultural values of sites or precincts targeted for detailed investigation.
- Write a brief Statement of Significance, based on the established values, for all sites or precincts targeted for detailed investigation. (Clearly set out what part or parts of the sites or precincts need to be retained in order to keep their significance – or their values.)
- Establish, for comparative purposes, a four-rung (more or less) rating scale, and rate each site or precinct targeted for detailed investigation (this scale should be related to other existing scales).
- Produce a condition report (or a series of condition reports) on targeted sites or precincts.

Conservation Plan: Part II (Vision, Scope, Objectives, Methods: VSOM)

Phase 3: Implementation of Legal Prerequisites (*Vision and Scope*)

- Establishment of formal management organization.
- Formal agreement on sites or precincts to be protected (initial part of scope).
- Demarcation of site and precinct boundaries.
- Demarcation of buffer zones for site and precinct boundaries.
- Erection of official plaque(s).

Phase 4: Definition of Scope and Objectives, and Formulation of Plan (*Objectives*) (*SWOT*)

- Scope of work.
- Objectives (what are the specific things you want to achieve).
 1. In regard to buildings, the retention of *significant* structures, spaces and general character?
 2. Or, in regard to setting, the retention of relationships between spaces, landscape and garden layouts, plantings, views and vistas, fencing and walling?
 3. Or, in regard to development, the provision to renovate properties internally (unless, of course, the interior has significance)?
 4. Or, in regard to tourism, the placement of community needs over those of tourists? (Singapore: “Our heritage is for us; if tourists want to enjoy it, we are happy to share it with them, but it is primarily for us.”)?
 5. Or in regard to inherent characteristics, the retention of as many traditional uses and traditional activities as possible and as appropriate? *And, sometimes, these are related to maintaining a certain level of population density.*
 6. Or, in regard to economic viability: the support of existing commercial activities; the revitalization of traditional activities valued by the community; and the promotion of new and appropriate activities that build on the strengths of the community and connect with the community’s vision of its future? *And, sometimes, these activities are related to the level of population density as well. Jane Jacobs, in The Death and Life of Great American Cities, credits the success (vitality, viability) of large urban areas (especially their*

historic cores) to four things: small blocks, mixed uses, broad range of property costs/rentals AND a critical density of people. And, in large conservation projects, these four indicators are important to keep in mind.

- Strategies, both general and specific (how can you best achieve your objectives).
- Use(s) (the use(s) must reflect the *values* of the site or precinct, must be appropriate for the community, and should be economically viable [how many museums does a community need..]).
- Conservation measures (what conservation principles should be followed). The following conservation principles are based on those found in the *China Principles*.
 1. Conservation must be undertaken *in situ*.
 2. Intervention should be minimal.
 3. Regular maintenance is critical.
 4. Physical remains should be conserved without loss of evidence. The results of intervention should be unobtrusive, but should still be distinguishable.
 5. Techniques and materials should meet conservation requirements. Distinctive traditional technology and craftsmanship must be preserved. New materials and techniques should only be used after demonstrated success.
 6. Alterations to historic fabric may not be made for cosmetic purposes or to create “completeness”.
 7. The setting of a site or precinct must be conserved.
 8. A building that no longer survives should not be reconstructed.
 9. Care must be taken to conserve archaeological finds.
 10. Rescue and disaster-response plans are important.
- Interpretation (first for the community and then for others).
- Business Plan.

Phase 5: Implementation of Plan (*Method*)

- Draft conservation guidelines (specific directions for carrying out conservation work). There should be different guidelines for different levels of intervention, and there should be very specific guidelines for how to best provide/update building services such as electrical, mechanical, hydraulic and communication services.
- Engage architects for new construction (and conservation architects, if possible).

- Prepare short-, medium-, and long-term Action Plans (project phasing). Determine, organize and coordinate tasks carefully; determine who will be responsible for supervising tasks (and organizing people to do the tasks); and determine task completion dates.
- Implement Action Plans.
- Record all work systematically.
- Review all tasks on a regular basis.
- Provide interpretation (update community on progress of work).

Phase 6: Review and Revision of Plan (*Vision*)

- Review all Action Plans periodically.
- Review Conservation Plan on a periodic basis as well.
- Prepare Maintenance Plan(s).

Conservation Plan – Summary

Conservation Plan: Part I (*Vision*)

Phase 1: Investigation and Research, and Interim Management Organization (*Vision*)

Phase 2: Assessment and Interim Management Organization (*Vision*)

Conservation Plan: Part II (*Vision, Scope, Objectives, Methods: VSOM*)

Phase 3: Implementation of Legal Prerequisites (*Vision and Scope*)

Phase 4: Definition of Scope and Objectives, and Formation of Plan (*Objectives*) (*SWOT*)

Phase 5: Implementation of Plan (*Method*)

Phase 6: Review and Revision of Plan (*Vision*)

Concluding Thoughts

Preparing a comprehensive Conservation Plan helps us to protect our heritage resources from ill-considered change.

Our cultural heritage, both tangible and intangible, is fundamental to who we are ...