

Cultural Heritage Management Plan

Management planning (including the management plans produced in this respect) is increasingly gaining recognition throughout the world as a strategic and operative tool concerning the protection and enhancement of cultural heritage (CH). Given the fact that many museums and heritage sites, especially smaller ones, continue to suffer from inefficient management due to lack of funding and support, as well as the pressures of ongoing crises, it is crucial for them to set up a Cultural Heritage Management (CHM) plan. In doing so, they should take into account a wide range of aspects and processes, such as: legislation, identification, assessment, statutory protection, conservation (preservation, restoration, reconstruction, adaptation), rehabilitation and revitalization, use, maintenance, guarding, interpretation, presentation, monitoring, control, and research. It is worth noting, that there are considerable variations in the context and character of a CHM plan, depending on the type of property. For example, drafting a management plan for an archaeological site, a major museum or an urban center, would be definitely a complex procedure. Instead, drafting a management plan for a single historic building or a small museum can be simpler.

What is a CHM plan for museums and heritage sites?

A CHM plan is a succinct document that explains management issues, approaches and requirements relating to museums and heritage sites and sets a framework for decision making over a given period of time. It should be sufficiently flexible, clear, simple, management oriented and easily understood.

What are the main objectives of a CHM plan?

The overall objectives of a CHM plan are to:

- protect the values of the CH for present and future generations
- promote effective sustainability practices
- balance and coordinate CH needs against those of CH 'users'

What are the major issues that almost every CHM plan should address?

The first step a museum or a heritage site must take in order to develop and implement a successful management plan is to understand the needs, challenges and bottlenecks of this era. Having fully understood the needs and challenges of this era, as well as the potential opportunities, museums and heritage sites should create management plans which, among other things, must include strategies for the following issues:

- Collection Management
- Audience and local communities' engagement
- Energy and environmental Management
- Intellectual Property (IP) Management
- New 'Business' Models and Financing

Recommendations on issues to be included in a CHM plan

- **Setting up strategies** accompanied by clear policies, guidelines, and possibly a road map on strategies implementation and resource allocation can facilitate the success of CHM process.

Some examples are:

- A **Communication strategy**, specifically social media policies, must be agreed and adopted. It is important to acknowledge the different demands of internal and external information-sharing and must be regularly tuned to meet changing needs. Various communication tools, some of them borrowed from other sectors, can facilitate the effective implementation of the CHM plan.
- An **Intellectual Property strategy**, with an emphasis on copyright, reinforces CH as an asset, ensures that no third-party IP assets are infringed, and contributes towards the effectiveness of the CHM plan. As WIPO has convincingly argued, copyright protection is above all one of the means of promoting, enriching, and disseminating national CH.
- Finally, setting up an **Environmental and Energy strategy** is also important in order to create an effective policy framework for decision making and implementation in relation to environmental and CH sustainability. It is crucial in order to revisit and adapt environmental plans, to reduce energy consumption, to improve sustainability of buildings, to find alternative energy sources and to have guidance on how to address the energy and cost of living crisis. This seems more relevant now, as humanity faces a new energy and cost of living crisis that followed the war in Ukraine (2022).

- To ensure the effectiveness of the CHM plan, a wide basis of professional and scientific knowledge and skills are required. The operation's responsibility is to train and induct all employees in CH matters so as to avoid mistakes and failures in the implementation of the CHM plan. **Training** gives heritage practitioners the opportunity to increase their operational efficiency and the effectiveness of heritage management practice. In this respect, tools such as marketing plans, business plans, strategic plans, project management software helps practitioners to work more efficiently. Furthermore, cultural awareness training is a process that can inform and educate people about key issues related to CH with the intention of influencing their attitudes, behaviours, and beliefs, towards the achievement of a defined goal. This can, subsequently, facilitate the success of the CHM plan.
- **Setting up organograms** is also important in order to show hierarchical relationships between managers and the people who report to them, as well as departments. In addition, effective implementation of management planning also depends on coordinating the contribution of all relevant stakeholders and this requires particular skills.
- **Evaluation process** is also of paramount importance for the successful implementation of the CHM plan. It concerns self-evaluation and external evaluation that should take place on a regular basis. Furthermore, monitoring is an important instrument of reviewing given the fact that when a CHM plan comes into practice changes must be expected.
- Due to its interdisciplinary nature, the CHM must be based upon effective **collaboration and communication between professionals from various disciplines**. Synergies and networks may be valuable in this respect. It also requires the involvement of government authorities, academic researchers, universities, research institutions and the general public. Effective implementation of management planning largely depends on supervision by an interdisciplinary team of specialists relevant to the problems being addressed. This team can deliver appropriate responses to emerging needs during implementation.
- Digital technologies offer solutions to successfully implement a CHM plan. For example, the **use of innovative tools** can facilitate the targeting of audiences, the understanding of their needs and the effective response to them (e.g., tourists, younger audience, local communities, minorities, Special Needs Groups).
- Implementing **codes of conduct** can ensure that targets are pursued, and any tasks are implemented considering ethics and deontology and minimizing risks in this area.
- **Hybridisation of roles** within organisations of the sector, (e.g., collection's manager working also with outreach activities).

- **Use of existing programs for CH professionals** (e.g., ‘Erasmus programme’ for professionals).
- Schemes/systems to **make professionals change roles** within & between organisations to provide new perspectives and develop innovation capacity.
- **Intra-museum collaboration** as a means of developing niche or audience specialization.

The Project

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