



AN AGENCY OF THE DEPARTMENT OF ARTS AND CULTURE

GUIDELINES FOR CONSERVATION MANAGEMENT PLANS FOR HERITAGE SITES

1. Why have a Conservation Management Plan?

South Africa has a unique and irreplaceable archaeological and palaeontological heritage that can be particularly vulnerable to damage resulting from human agency. These heritage sites are protected by the National Heritage Resources Act (No. 25 of 1999). Even if a development does not have a direct impact on a heritage site, developments can result in secondary impact that may threaten a site's survival. In such cases, and when a heritage site is to be opened to the public, either as a formal site museum, or simply as a place of interest, precautions must be taken to ensure the safety of the site and its contents. These precautions include a professional investigation leading to a Conservation Management Plan (CMP), approved by the relevant heritage resources authority. Some heritage practitioners use the term Integrated Conservation Management Plan (ICMP) – for the purposes of these guidelines, a CMP and an ICMP are regarded as being in principle the same. By mitigating the impact of visitors, the aim of a CMP is to protect and conserve the significance of a heritage site. Bearing in mind that every heritage site is unique, there is no one-size-fits-all CMP, but there are basic principles to guide heritage site management and sequences of planning and actions that, if followed, can greatly enhance the efficacy of a CMP. These guidelines have been written as a guide to the basic principles and sequences of planning and actions that a CMP should adhere to in order for it to be effective.

2. Which heritage sites require a Conservation Management Plan?

Sites that are to be declared national or provincial heritage sites require a Conservation Management Plan in order to deal with the increased number of visitors that often results from declaration. But other sites, especially those that may be affected indirectly by increased human activity, such as a township or other residential developments, also require a CMP. The significance and extent of the site, as well as the level of direct or indirect impact that it may be subjected to, will determine how extensive and detailed a CMP needs to be.

3. Five Steps in developing a Conservation Management Plan

Step 1: A team should be formed that will initiate and coordinate the project, along with a project leader and management committee. All relevant stakeholder should be identified and the first stakeholder's meeting should take place in order to start building partnerships. Information about the identity of the site, such as site boundaries and photographs, should be gathered.

Step 2: All available information about the heritage site must be gathered, including oral histories and intangible heritage, past and present owners and management authorities and visitor management practices, as well as information regarding development, such as development plans and legal documents. A condition survey of the state of conservation of the site should be conducted.

Step 3: Values and cultural significance associated with the site are determined and key issues identified along with the authenticity and integrity of the site. Guiding principles are determined and a SWOT analysis undertaken. This step concludes with a stakeholder's meeting to discuss all gathered data.

Step 4: Specific objectives must be developed, along with strategies for meeting the objectives. An action plan and implementation plan should be developed, including a monitoring and evaluation strategy. The process to this point should be evaluated before any implementation recommendations are made.

Step 5: The CMP is implemented with clearly defined short-term and long-term actions. Resources required for the implementation of the plan should be identified, including the institution or office that will be responsible for the implementation of the CMP. The CMP is communicated to all stakeholders. All actions need to be documented.

4. Elements that need to be included in a Conservation Management Plan

- a. Statement of significance
- b. Site description, along with the context of its environmental setting
- c. Site history
- d. Stakeholders, with contact details
- e. Legal framework and management context
- f. The present and past uses of the heritage site
- g. Site condition survey results, and the history of any conservation measures (both preventive and remedial conservation measures)
- h. SWOT analysis
- i. Guiding principles
- j. Visitor management
- k. Objectives, strategies and action plans to cover: site management, presentation, interpretation, safety, research and education, marketing and conservation
- l. A system whereby approvals for changes are obtained
- m. Monitoring and evaluation
- n. Documentation of implementation and monitoring

5. Guiding Principles of a Conservation Management Plan

- The Statement of Significance should be a concise and clear presentation of the values particular to a heritage site that contribute to its significance. These values can be cultural, social, historic, scientific or aesthetic.
- Minimum intervention: Any action that changes the physical aspect of the heritage site should be guided by the concept of achieving the required result through the least disturbance of the heritage site. Interventions may only be undertaken once a permit to do so has been granted by the relevant heritage authority.
- Reversibility: Whatever conservation measures have been applied should be reversible.
- Consideration of authenticity – where new materials have been used, this should be disclosed and should be clearly discernible by visitors.
- Bear in mind that preventive conservation measures are preferable to remedial measures since they involve less direct disturbance of a site, are often more cost-effective and easier to implement.

- A budget for maintenance and monitoring must be in place.
- The CMP must make clear who is responsible for what aspects of implementation and monitoring, and how this is documented.

6. Revisions and Changes to the Conservation Management Plan

A CMP may very well be modified over time and needs to be flexible enough to allow for revisions and changes. It should be reviewed at least every five years. These modifications should be discussed with the relevant stakeholders and submitted to the appropriate management authority for approval.