



SOUTH AFRICAN HERITAGE RESOURCES AGENCY

SITE MANAGEMENT PLANS: GUIDELINES FOR THE DEVELOPMENT OF PLANS FOR THE MANAGEMENT OF HERITAGE SITES OR PLACES.

1. INTRODUCTION

The heritage sector has always used the term Conservation Management Plan (CMP) to refer to plans providing for the management of heritage sites or heritage resources within sites. There is however confusion among some institutions and professionals who feel that the term CMP as provided for in section 47 of the National Heritage Resources Act No 25 of 1999 (NHRA) is outdated and therefore the term Integrated Management Plan (IMP) should rather be used. IMP is the term used in the World Heritage Convention Act and clearly has been borrowed from environmentalists who use the term Integrated Environmental Management Plan.

Although it is not important what such a plan is called, it is important to clarify whether a CMP and an IMP is one and the same thing. In simple terms a CMP is a single policy focused on the management of heritage resources. An Integrated Management Plan is broader because it normally involves different policies of which the CMP is only one. A CMP can therefore be a part of an IMP or it can be the basis of an IMP.

SAHRA therefore is adapting the use of the term IMP for sites, which involves a variety of aspects and as a result requires policies that covers more than just heritage conservation and/ or management. The term CMP as provided in section 47 of the NHRA will be used to refer to all other heritage management plans (i.e. Heritage Conservation Plans, Heritage Management Plans, Conservation Plans, etc). The IMP may be used for example for a cultural heritage landscape such as Mapungubwe and CMPs may be prepared for the management of specific sites.

SAHRA understands very well that there are no single answers or solutions for a given place/ site but believes that there are basic principles that guide the management of sites and, equally important, an essential logical sequence of management planning and actions, which must be followed to ensure success, or at least to avoid action that could well make the situation worse than before.

2. DEFINITIONS

2.1. *Heritage Site Management:* Heritage site management is the control of the elements that make up physical and social environment of a site, its physical condition, land use, human visitors, interpretation, etc. Management may be aimed at preservation or, if necessary at minimizing damage or destruction or at presentation of the site to the public. A site management plan is designed to retain the significance of the place. It ensures that the preservation, enhancement, presentation and maintenance of the place/site is deliberately and thoughtfully designed to protect the heritage values of the place.

3. WHY DO WE NEED A MANAGEMENT PLAN?

- 3.1. SAHRA has made it compulsory for a management plan to be developed before any site can be declared as a National Heritage site.
- 3.2. A management plan also gives directions to operate, for example:
 - 3.2.1. What needs to be done;
 - 3.2.2. How it will be done;
 - 3.2.3. Who will do it;
 - 3.2.4. How it will be funded;
 - 3.2.5. When it will be done.
- 3.3. It helps define clear objectives and goals.
- 3.4. It defines activities.
- 3.5. It guides any future development.
- 3.6. It gives an idea of cost implications.
- 3.7. It is a good monitoring tool.
- 3.8. It helps in the development of partnerships.
- 3.9. It helps involve stakeholders and encourages co-ordination among stakeholders and authorities.
- 3.10. It describes the process for attaining approvals for changes to the site.
- 3.11. It helps to identify professional needs.
- 3.12. It clarifies responsibilities.
- 3.13. It also helps in the identification and definition of values of the place or sites.
- 3.14. A management plan provides and establishes guiding principles or coordinated actions for activities on site, including conservation, maintenance, monitoring, interpretation, enhancements and evaluation.

4. WHAT SHOULD BE COVERED IN A SITE MANAGEMENT PLAN

Although SAHRA does not wish to prescribe a template for management plans, we believe that all management plans should include at least the following basics:

- 4.1. Statement of site significance (including values);
- 4.2. Site description, including environmental setting;
- 4.3. History of the site;
- 4.4. Stakeholders;

- 4.5. Legal framework and management context;
- 4.6. Present and past uses of the site;
- 4.7. Site condition and history of conservation;
- 4.8. SWOT analysis;
- 4.9. Guiding principles;
- 4.10. Visitor management;
- 4.11. Objectives and strategies;
- 4.12. Action plan;
- 4.13. Objectives, strategies and action plan should cover the management of the site, site presentation, interpretation, safety, education and research, marketing and site conservation;
- 4.14. Plans / alterations approvals system – process of getting approvals for changes, approvals committees, delegations, responsibilities etc
- 4.15. Monitoring and evaluation;
- 4.16. Documentation of implementation and monitoring.

5. STEPS TO BE FOLLOWED IN THE DEVELOPMENT OF SITE MANAGEMENT PLANS

5.1. Step 1: Social Assessment, Identification of Stakeholders and Formation of Management Committee

- 5.1.1. A team should be formed to initiate the project.
- 5.1.2. A project leader should be identified to lead the establishment of a management committee and to eventually coordinate such a committee.
- 5.1.3. All relevant stakeholders should be identified at this stage.
- 5.1.4. Information on the identity of the place (e.g. boundaries) should also be gathered at this stage.
- 5.1.5. The first stakeholders' meeting should be held to explain the intended plan and to assess their attitude.

5.2. Step 2: Documentation, Research and Investigation of the Identity of the Place.

- 5.2.1. All available information about the place/site should be gathered (all documentation as well as oral history and intangible values).
- 5.2.2. All data that puts the place/site into context should be gathered (e.g. relevant legal documents and development plans).
- 5.2.3. A condition survey or the state of conservation of the place/site should also be investigated.
- 5.2.4. Information on the past and present management authorities and/ or owners should be gathered.

5.2.5. Information on the past and present interpretation, presentation and visitor management practices at the place/site should be gathered.

5.3. Step 3: Analysis of the Information Gathered

- 5.3.1. Values of the place/site should be determined.
- 5.3.2. The cultural significance of the place should be determined.
- 5.3.3. Key Issues should be identified.
- 5.3.4. The authenticity and integrity of the place/site should be investigated.
- 5.3.5. Guiding principles should be determined.
- 5.3.6. A situational Analysis should be conducted at this stage (this can be by way of SWOT and/or other types of analysis).
- 5.3.7. Various types of responses should be explored and evaluated before appropriate ones are chosen.
- 5.3.8. A stakeholders' meeting should take place at this stage to discuss all gathered data with all stakeholders.

5.4. Step 4: Development of Appropriate Responses.

- 5.4.1. Specific Objectives should be developed.
- 5.4.2. Strategies for meeting the objectives should be designed.
- 5.4.3. An Action Plan should be developed.
- 5.4.4. An Implementation Plan should be developed.
- 5.4.5. A Monitoring and Evaluation strategy should be spelled out.
- 5.4.6. There should be an evaluation of the process thus far before implementation recommendations can be made.

5.5. Step 5: Implementation Plan

- 5.5.1. Short term and long term actions should be clearly spelled out.
- 5.5.2. Resources necessary for the implementation of the plan should be identified (this should include the institution or office to be tasked with the implementation of the plan).
- 5.5.3. The Management plan should be properly communicated to all stakeholders.
- 5.5.4. All actions must be documented.

6. Basic Principles for the development of Management plans.

- 6.1. All management plans should take into consideration the general principles for heritage resources management as set out in Section 5 of the NHRA.
- 6.2. All management plans should promote cooperative governance and stakeholder cooperation.
- 6.3. Management plans should be in very simple language and they should not be unnecessarily complex (*management plans should not look like dissertations for a University degree*).

- 6.4. Tabulation of the details of the site (name; erf; owner; contact details etc) at the beginning is useful.
- 6.5. Tabulation of monitoring and evaluation requirements and responsible parties is useful.
- 6.6. Stakeholders should be consulted at all stages of management planning.
- 6.7. Planning must be realistically suited to the cultural and social conditions of the community.
- 6.8. Where consultants are hired to develop a management plan, the relevant heritage resources authority should manage the process and provide guidance (*this applies to all management plans including those paid for by the private sector*).
- 6.9. A Management plan will only be considered official policy for the management of a site once it has been endorsed/ adopted by the relevant heritage resources authority.

7. STATEMENT OF SITE SIGNIFICANCE

7.1. Cultural Value

The cultural significance or value of a site is the cultural value it holds for the community, or for sections of the community.

Cultural significance can be determined by establishing the values of the site. Various Charters and Declarations (e.g. Burra Charter, Nara Declaration, Venice Charter, etc) put forward different values for the assessment of cultural significance. The following values (adapted from various charters and declarations and from the National Heritage Resources Act, Act No 25 1999) should be used for the assessment of cultural significance: Social, Historic, Scientific and Aesthetic Values.

7.2. Social Value

Social value embraces the qualities for which a place has become a focus of spiritual, political, national, or other cultural sentiments to a majority or minority group. Obviously many traditional sites have such a value. The local, provincial or national community may find them a source of pride, or education, or celebration, or a symbol of enduring culture. This may be because the site is accessible and well known, rather than particularly well preserved or scientifically important.

These values are very important and are probably the 'strongest' in terms of the conservation of a site. They apply not only to the finest and best examples of sites.

A site has often gained social value because of its aesthetic, historic or research value. For example, in Tanzania, research by archaeologists into the 3,5 million-year hominid (*Australopithecus afarensis*) footprints at Laetoli indicated the first effort by our ancestors to walk up right. Because of this research, the site has become of immense social significance (as a source of pride, and a symbol of continuity and history).

7.3. Historic Value

This value recognizes the contribution a place makes to the achievements of, and to our knowledge of, the past. A place can be a typical or a well-preserved example of a cultural, group, period of time, or type of human activity, or it can be associated with a particular individual. Often, a place, rather than representing one phase or aspect of history, has a long sequence of historic overlays and this long period of human history gives such places high historic value. These places take our imagination back in time and cause us to ponder on the past lifestyles and histories of our ancestors. Such places are a trigger to the historic imagination and have powerful evocative and educational value. Slave markets in West Africa, Nkrumah Park in Ghana or Sharpville and Robben Island here in South Africa would be cases in point.

7.4. Scientific Value

These are features of a place that provide, or have a realistic potential to yield knowledge that is not obtainable elsewhere. The scientific or research value of a place will depend upon the importance of the data involved or its rarity, quality or representativeness and on the degree to which the place may contribute further substantial information. This value is variously called scientific, archaeological, research or information value. Scientific or research value has often been the major value attached to places by Western professionals and Western Law. It has been used not only to protect sites but also to remove them from their owners' care.

7.5. Aesthetics Value

Aesthetic value may be described as the beauty of design, association or mood that the place possesses or it may be demonstration in a place, of a particular design, style, and artistic development of high level or craftsmanship. This is a recognition that a place represents a high point of the creative achievement in its design, its style, artistic development and craftsmanship. Aesthetic value may sometimes be difficult to measure or quantify. In Western society with its strong emphasis on measured time, the concept and symbolism of ancient things and the evidence of time's passing has itself a strong effect on the visitor. This is in contrast to the local community views. Time past is the immeasurable and dynamic because it is the time of the ancestors. The past is very often seen as the present. Aesthetic value is therefore subjective, especially when it arises from cultural backgrounds and individual taste. Aesthetics, like beauty are "in the eyes of the beholder"

8. APPROVAL SYSTEM FOR CHANGE

- 8.1.Changes in the management plan can be proposed by any affected party.
- 8.2.Changes should be discussed with the stakeholders including the designated SAHRA official.
- 8.3.Changes should be submitted to SAHRA for approval.
- 8.4.Any changes will be considered official after a formal approval by SAHRA.

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