



## Integrated Project and Heritage Management

Presented by:  
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## Integrated Project and Heritage Management

- Feasibility studies
- Budgets, cost plans
- Life cycle costing
- Preparation of business cases
- Project planning
- Cost control
- Procurement
- Value engineering
- Contract administration
- Change control
- Financial management
- Risk management

- Option appraisals
- Conservation Plans
- Management Plans
- Visitor Management Plans
- Heritage Impact Assessments
- Targeted Specialist Investigations
- Economic and Social impacts
- Strategic Planning
- Business Planning
- Interpretation Planning
- and more.....

### Integrated Project and Heritage Management

Cardiff Castle House and Clock Tower East Elevation



Award winning integrated project and heritage management...

*Why do we need it ?*

### Integrated Project and Heritage Management



Foreign and Commonwealth Office

*Why do we need it ?*

### Integrated Project and Heritage Management



Foreign and Commonwealth Office

Grand Staircase

*Why do we need it ?*

### Integrated Project and Heritage Management




Foreign and Commonwealth Office

Downing Street West Entrance

*Why do we need it ?*

Integrated Project and Heritage Management



House of Lords Chamber

*Why do we need it ?*



Integrated Project and Heritage Management



Tibet ~  
Relating  
people to  
their  
environment

*Why do we need it ?*



Integrated Project and Heritage Management



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Integrated Project and Heritage Management



Tibet ~ Moxi

*Why do we need it ?*



Integrated Project and Heritage Management



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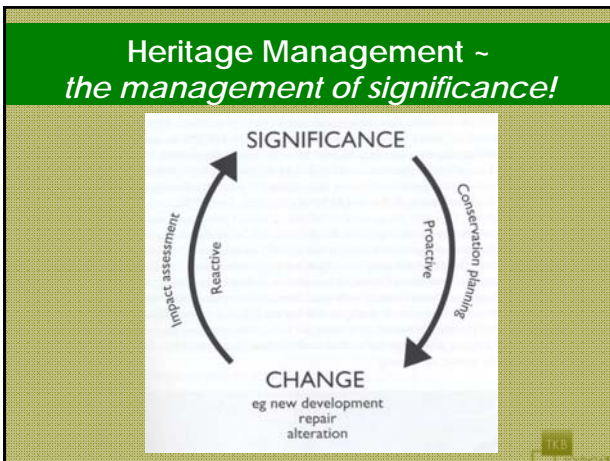
Integrated Project and Heritage Management



Tibet ~ Moxi

*Why do we need it ?*





- ### Understanding and Managing Significance ~ Methods
1. Conservation Plan ~ *most detailed.*
  2. Conservation Statement ~ *based on existing knowledge.*
  3. Rapid Assessment ~ *some research.*
  4. Heritage Impact Assessment ~ *measuring against proposals.*

### Heritage Management ~ management planning ~ pro-active

#### Typical Conservation Policies

Conservation Work  
POLICY 7.3A: SIGNIFICANCE STATUS (See Issue 7)

(i) All intervention, structural or otherwise which is proven to be necessary for the conservation of significant fabric should seek to understand, protect and enhance the significance during works and avoid the loss of other significant fabric.

(ii) Where intervention and loss of fabric is unavoidable it should be kept strictly to the minimum and fabric of lesser significance should be sacrificed in preference to fabric of considerable significance.

The significance of fabric elements are defined in greater detail with the Annex documents

- ### Conservation Based Research and Analysis (CoBRA) Stages
- Each an individual or number of projects*
- Stage One ~ Conservation Plan/Statement/ Rapid Assessment
  - Stage Two ~ Survey and Analysis in advance of works
  - Stage Three ~ Targeted Specialist Investigation (TSI)
  - Stage Four ~ Analysis during works, recording, etc.
  - Stage Five ~ Recording and Archive

- ### All Heritage Management Activities ~ have to be Project Managed!
- The very basic stages:*
- Stage One ~ Initiation
  - Stage Two ~ Feasibility
  - Stage Three ~ Planning
  - Stage Four ~ Implementation
  - Stage Five ~ Evaluation

### Heritage Management ~ Re-Active Method Heritage Impact Assessment

Proposed Work	Significance of Fabric Effected	Potential Impact of Work	CoBRA Information	Possible Mitigation
(from specification/ drawings)	(explain why fabric is important)	(decide whether the proposals put the fabric at risk)		(ways of minimising any adverse impact)
Redecoration of exterior wood work to a <u>Grade 1 Listed house</u>	Historic paint layers could be present.	Potential damage to historic paint layers during preparation.	Architectural paint research before making decision.	Minimal surface preparation and retain paint archaeology.


## What is conservation ?

“Conservation means all the processes of looking after a place so as to retain its cultural significance. It includes maintenance and may according to circumstance include preservation, restoration, reconstruction and adaptation and will be commonly a combination of more than one of these”  
 (Australian Burra Charter)



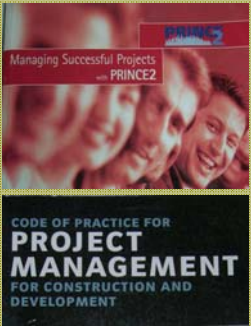

## Conservation ~ Retaining Significance!

Cultural significance means:  
 “aesthetic, historic, scientific or social value for past, present or future generations”



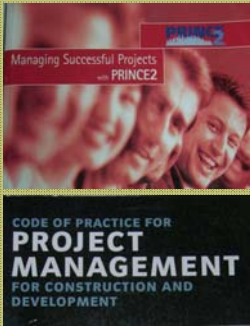

## Main Characteristics of a Project

1. Instrument for bringing about change
2. Start and finish
3. Result – something being delivered
4. Unique as an entity
5. Responsibility of a single person or body
6. Involves resources (time, financial, etc.)

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## Specific Project Management Skills

1. Integration management – cohesive and comprehensive
2. Scope management – what needs to be done and achieved.
3. Time management – schedule against a time frame including WBS's, identifying dependency relationships.
4. Procurement Management – selection, appointment, monitoring and completion of services procured.
5. Human Resource Management
6. Communication Management
7. Quality Management
8. Cost Management




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## Project Structure ~ optimum way of achieving a successful project



**ESSENTIAL CHARACTERISTICS**

1. Retain significance ~ consistent application of philosophy
2. Efficient execution
3. Maximise quality
4. Minimise risk
5. Consider different approaches

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*The very basic stages:*

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## Integrated Project and Heritage Management

### 1. INITIATION

1. Develop checklists of specific SPECIALIST/CONSERVATION processes ~ e.g the English Heritage “Guidelines for Commissioning Architectural Paint Research” re paint research.
2. Determine checklists of Conservation in accordance with respected definitions is practiced?
3. Terms of reference (the Brief) ~ this includes: Relationship of this project to others in a programme, responsibilities of the Project Manager.

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## Integrated Project and Heritage Management

### 2. FEASIBILITY

*Initiation ~ what the project intended to deliver, how this can be achieved and by whom.*

*Feasibility ~ determine if it can be delivered and whether the approaches detailed are the optimum.*

Integrated Project and Heritage Management  
**2. FEASIBILITY**

1. Will it achieve the objectives?
2. Is the expert advice received credible?
3. Is it technically feasible?
4. Is the approach chosen the optimum?
5. Can it be done for the budget?
6. Is it physically possible in the circumstances?
7. Can it be done within the time frame?
8. Is it worthwhile – Cost Benefit Analysis

Integrated Project and Heritage Management  
**3. PLANNING**

**RESOURCES - *Appointing a contractor /consultant***

Specialist Competencies Demonstrated - specific:  
**Example: Architectural Paint Research**

1. Knowledge of painting techniques & materials
2. Architectural and interior design history
3. Basic microscopy
4. Analytical techniques - ID of painting materials
5. Conservation codes, practices, building materials

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**3. PLANNING**

**Resources:** Competencies demonstrated - generic:

1. Technical qualifications
2. Appreciation of project objectives
3. Level of available supporting resources
4. Creative/innovative ability
5. Enthusiasm and commitment
6. Positive team attitude
7. Good communication skills

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**4. IMPLEMENTATION**

**Monitoring - whether project going to plan and indicate where problems may exist. Once a problem is suspected - determine:**

1. Broader effect of the problem ?
2. What must be done to correct the problem ?
3. What must be done to put the project back on track ?
4. What was the cause ?
5. What must be done to ensure there is no repeat of the problem ?

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**4. IMPLEMENTATION**

**Monitoring - the conservation philosophy / historic significance issues.**

1. See conservation policies (if there are any) - are they being complied with?
2. Undertake a Heritage Impact Assessment

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**5. EVALUATION**

***Generally - the measurement of what was produced, against what was detailed in the " design" (or its agreed amendment) on the basis that the design is acceptable from a significance management perspective.***

Restoring the Cardiff Castle *Clock Tower*



Justified by Conservation Policies

Restoring the Cardiff Castle *Clock Tower*



Conservation policy adherence ~ PM Compliance

Restoring the Cardiff Castle *Clock Tower*



TKB

Restoring the Cardiff Castle *Clock Tower*



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House Refurbishment ~ Cardiff Castle  
Sustainability ~ Significance & Commerciality



Before After

Integrated Project and Heritage Management ~ *Creating the balance!*

House Refurbishment ~ Cardiff Castle  
Sustainability ~ Significance & Commerciality



Sound Conservation Philosophy + Interpretative Design + Operator Business Plan = Business Case

**Heritage Management ~ delivering positive economic benefits**



**'AREAS BEREFT OF A STRONG BUILT HERITAGE HAVE MUCH LOWER AVERAGE HOUSE PRICES THAN THE LOCAL AUTHORITY IN WHICH THEY SIT'**

£20,000 less -  
Mr Sutton King also pointed out that those buying period properties tend to be able to put down reasonable deposits. "I'm not saying that they are immune from the credit crunch because clearly they can't be, but you haven't got the credit crunch directly affecting that"

**Integrated Project and Heritage Management ~  
Creating the balance !**



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