

# HERITAGE PRO

## GUIDELINES

### OUTPUT 2

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### GUIDELINES

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These guidelines are part of the HERITAGE-PRO training scheme of five training modules and five corresponding guidelines that have been developed within the Erasmus+ Strategic Partnership **HERITAGE-PRO – Interdisciplinary Training for Professionals of Different Disciplines Towards Sustainable Management and Preservation of Cultural Heritage**. The training modules and the corresponding guidelines are available in English, German and Spanish.

The training and guidelines focus on interdisciplinary aspects of cultural heritage preservation and have been developed by six public and private European institutions, networks, development agencies and associations, all of which are linked to cultural heritage preservation.

The training at a glance:

## HERITAGE-PRO TRAINING SCHEME

Find out more  
HERE

**Training Module 1  
and Guideline 1**  
Global Challenges  
and Opportunities in  
the Field of Cultural  
Heritage

**Training Module 2  
and Guideline 2**  
Efficient Teamworking  
and Effective  
Interdisciplinary  
Conflict Resolution

**Training Module 3  
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Valorisation of  
Cultural Heritage

**Training Module 4  
and Guideline 4**  
Participation

**Training Module 5  
and Guideline 5**  
Effective  
Communication in  
an Interdisciplinary  
Environment



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# 1 ABOUT THE HERITAGE-PRO TRAINING SCHEME

As a professional in cultural heritage management you have your own background: you might be a cultural manager, an art historian, an architect, or a geographer. You might also have a business administration or real estate management background. Entering the “world” of cultural heritage and its related complex social, economic and environmental processes – which include different layers and technical and planning steps - and with its numerous specialists, stakeholders and interests, is a true challenge. Maybe you have to lead cultural heritage preservation projects, moderate the interdisciplinary team while working, or even resolve conflicts.

This training was developed by an interdisciplinary team for interdisciplinary purposes in cultural heritage management. It is based on many experiences of the European partners who want to further improve cultural heritage management. This training is based above all on the insight that the cooperation of different professional groups in complex conservation projects is a great challenge, which receives far too little attention in the relevant courses of university education and professional training. Therefore, this training is conceived as vocational further training, which aims to give you tools that you can use directly in your professional practice.

# 2 ABOUT THESE GUIDELINES

These guidelines are based on three main assumptions:



You are a heritage manager at the beginning of your career who would like to enrich the personal career path with existing experience (and thus avoid mistakes and disappointments that can result from demanding interdisciplinary cooperation)



Successful interdisciplinary work on the valorisation of cultural heritage (CH) needs the personal capability to act consciously and situation specific.



The necessary situation specific conscious behaviour is based on:

- › basic knowledge – in **Heritage-Pro** mainly provided by the training modules;

- › learning by doing – testing the behaviour which the guidelines on hand introduce and recommend for certain situations;
- › continuous learning – using the methods for the continuous documentation, reflection and improvements the guidelines on hand introduce.

The main target of the guidelines is to help you to implement the training modules through practical guidance.

In chapter three, you will find **on the left side of each page the description of a certain situation** – this

could be the description of situations in a certain case concerning the valorisation of cultural heritage or the description of a prototypical situation. **On the right side of each page you can find recommendations** how to handle the situation, and how to behave in that specific situation.

In chapter four, you will find guidance and methods for your continuous individual development. The aim of chapter four is that you will have your personal guidelines; your personal guidebook, after a while.

We hope you like the guidelines and you take them “out of the drawer” on a regular basis at the beginning of your personal development.

## 3 GUIDELINES

### 3.1 GUIDELINES referring to Module 1 Global Challenges and Opportunities in the Field of Cultural Heritage

#### SITUATION/CHALLENGE [CASE/CHALLENGE]

##### Albarracín Sustainable Heritage Project

Albarracín is a medieval village in the province of Teruel, in the East of Spain. In 2019 its population stood at 1,025 inhabitants.

In the early 1960s the municipality of Albarracín faced three main challenges: (1) how to offer the possibilities for professional development to the younger population to avoid their exodus to the cities, (2) how to promote the economic development of an area whose agricultural activity was gradually declining, and (3) how to finance the preservation of their historical heritage. Bringing in specialized craftspeople and offering them room and board meant high costs that the council could not afford. In 1961 the village was declared a National Monument.

Albarracín is a good example of the use of cultural heritage as a resource for economic and social

#### GUIDELINES/RECOMMENDATIONS

Just as the municipality of Albarracín did in 1988 when they created a vocational school for education of craftspeople in cultural heritage preservation, think about promoting multidisciplinary partnerships, and support fruitful interactions among different agents of society to build projects that combine complementary activities, e.g., education, entrepreneurship, preservation of cultural heritage, regional development, etc.

Draft a first idea to make an initial sketch of a potential collaboration which will attract the relevant players to the table. Be confident that cultural heritage can facilitate a new dialogue between the institutions where perhaps a previous lack of communication existed. Your stakeholders could range from national, regional and local public bodies to technologists, architects, trainers, craftspeople, etc. However, be aware that the project should be designed and developed jointly by

sustainable development. Let me walk you through the several stages involved in the process:



The declaration in 1961 of Albarracín as National Monument allowed for the implementation of a protection plan for the historic complex that involved some initial actions from the town hall, such as removing the wiring from the facades and installing it underground. It began to become apparent that its rich heritage could become a source of income thanks to the development of tourism and, consequently, of the local economy.



Since 1988 the City Council has promoted the creation of **a vocational school in which to train young people from the region in traditional trades: carpentry, forging, masonry and stonework**. This led to various restorations being carried out in monuments and spaces of the town, which in turn resulted in **the foundation of four companies - one for each trade - and the creation of 39 jobs**. Thus, the restoration of the heritage allowed the vocational training of young people in the region who learned a trade while preserving part of their heritage.



Since 1992, the school's speciality of stonework has changed to that of mural painting. Restorations were carried out in the Episcopal Palace – transforming it into the Diocesan Museum – in the Congress Centre; and the headquarters of the Santa María de Albarracín Foundation, thus creating the necessary infrastructures to launch cultural activities.

The main objectives of this initiative (the vocational school and the creation of the SMEs) were the following:



Social integration and professional inclusion of young people at the end of the project, giving them practical training that would allow them to access professional opportunities.



Training of specialists for professions in demand in rural areas.

all participants. The earlier you involve them, the more they will have a sense of ownership and commitment towards the project.

Create synergies with these agents by understanding their particular aims and goals. Make sure that everybody feels comfortable with the steps taken and find a common purpose. One common purpose could be use cultural heritage as a magnet for investment and tourism and to achieve a coordinated and effective contribution to the sustainable development goals. Always bear in mind that **cultural heritage can play an essential role in helping to bridge the gap between political strategies and people's lives**.

For example, consider the **positive effects of improving know-how, capacity building and vocational training in traditional arts and crafts in the heritage-building sector**. Use its various advantages as arguments to defend cultural heritage as a driver of sustainable development:



The application of “soft maintenance”, thermal efficiency techniques and renewable energies improves energy efficiency in heritage structures that were built with traditional methods and materials, thus **contributing to reduce the effects of climate change in line with the challenges of the “green economy”**.







The recovery of traditional trades such as blacksmithing, carpentry, masonry, stonework, etc., ensures **long-term sustainability** of cultural heritage while retaining its character and significance.



Vocational training provides access to inclusive, **quality education and promotes lifelong learning opportunities**, helping people to participate fully in society and achieve their potential<sup>1</sup>.

<sup>1</sup> United Nations Sustainable Development Goals, SDG 4.


-  Participation in new professions linked to the protection of the environment and urban spaces.
-  Use of heritage restoration and conservation as a source of employment.
-  New jobs, created by young people themselves.
-  Dynamization of the environment through participation in local development programmes.

The restoration of the historical heritage was combined with the beneficial use of spaces, with the **programming of diverse cultural activities** such as courses, talks and conferences. Today, almost 100 activities take place per year. These are organised by different agents: by the Santa María de Albarracín Foundation (a cultural non-profit institution created in 1996 by the regional government, the municipality, the bishopric, and the financial institution Ibercaja), the city tourism board, or by private entities who hire the municipal spaces for cultural activities.

**The cultural heritage on offer has stimulated the local economy** through a series of private services: restaurants, craft and gift shops, private museums, hotels, guesthouses and country house lodges, among others.

As a result, an economic fabric has developed around the restoration and use of heritage, which has had a strong impact on the town. It has helped to establish a population that otherwise would have most probably suffered a rural exodus similar to that which occurred in the surrounding municipalities. It is surprising to see how a town of just 1,025 inhabitants has fiftyseven infrastructures linked to the tertiary sector, including fifteen hotels and five museums or exhibitions; a number more typical of medium-sized cities.

The direct impact of this set of actions currently translates into fiftysix direct and indirect jobs. To this we can add fifty jobs that have been stabilized, and that

-  Vocational training and cultural heritage enable an **intercultural and intergenerational dialogue**, reducing inequalities and helping build more inclusive communities. Education is essential for the respect of cultural diversity, of environmental integrity, to fight populism and to reduce inequalities related to poverty or gender issues.

Meet and explore potential collaboration with national or regional authorities in charge of employment programmes to **foster youth employment, especially in rural areas** that are suffering a continuous exodus of the population towards urban areas. To do so, beforehand you should analyse the employment training activities they may have been carrying out in other sectors. Try to understand their role, their objectives and motivations in order to adapt your proposal to their point of view.

**Explore the benefits of linking cultural heritage to live cultural activities**, such as performing arts, festivals, courses, talks or conferences. You could use historic spaces as unique backdrops for such activities. You could recreate historical events where they took place, or put on contemporary art events to contrast with the past. This will attract new visitors and enhance the region's appeal. Provide public access and encourage participation for all "irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status"<sup>2</sup>. People should have the right "to know, understand, visit, make use of, maintain, exchange and develop cultural heritage and cultural expressions, as well as to benefit from the cultural heritage and cultural expressions of others"<sup>3</sup>. Encourage the community not only to be informed, but also to get involved, to participate, to feel empowered and become part of the solution. (For more information about participation please refer to HERITAGE-PRO Module 4).

<sup>2</sup> United Nations Sustainable Development Goals, SDG 10.






<sup>3</sup> [http://www.unesco.org/culture/culture-sector-knowledge-management-tools/10\\_Info%20Sheet\\_Right%20to%20Culture.pdf](http://www.unesco.org/culture/culture-sector-knowledge-management-tools/10_Info%20Sheet_Right%20to%20Culture.pdf)



would otherwise have been lost had the town entered the same type of rural crisis that others have suffered.

(For additional information please visit: <https://fundacionsantamariadealbarracin.com/en>)

To sum up, come up with your own analysis and reflection about the following socioeconomic aspects in which you as a cultural heritage manager can make a difference:

-  Enhancement of heritage with a quality image.
-  Recovery of traditional trades to guarantee heritage conservation.
-  An increase in the social and tourist infrastructures of the city.
-  Creation of training and social opportunities for the younger generation, with the aim of preventing rural exodus.
-  Contribution to the sociocultural and economic development of the area.

In essence, show that cultural heritage can be approached as a production factor and an investment opportunity for the economy as well as a catalyst for social cohesion and environmental sustainability. (For additional information please refer to HERITAGE-PRO Module 1, Unit 1.3).

#### SITUATION/CHALLENGE [CASE/CHALLENGE]





##### Ullastret Archaeological Site

The Ullastret archaeological site in the North East of the Iberian Peninsula preserves the remains of one of the largest settlements of the Iberian tribe that Strabo, or Pliny the Elder called *indiketes*. The city was founded in the 6th century BC. At its height of splendour, around 200 BC, the city had about 6000 inhabitants. With its temples, noble houses and network of streets, Ullastret became an important centre of activity that traded with other towns, such as the Greek settlement of Empúries, less than twenty kilometres away.

Of the many Iberian settlements that exist in Spain from that period, Ullastret could have been just one more on the list. But the cultural heritage authorities at the site, in search of long term economic and

#### GUIDELINES/RECOMMENDATIONS

Firstly, **think about the reasons why** you, as cultural heritage manager, would like to enhance the valorisation and improve the visibility of your cultural heritage site. Ask yourself: is it worth making the effort and investment to attain this objective? What do we really want to achieve? The reasons could be manifold: economic, social, political, cultural, etc. Some examples could be:






-  to publicize this relevant archaeological site in the region in order to attract more visitors and earn more money;
-  to contribute to boosting the local economy;
-  the desire for society to have deeper knowledge of this heritage site and what it represents;
-  to involve the community in the process of enhancing cultural heritage; to make society to feel a part of it;

financial sustainability, looked **for new strategies to give greater visibility to Ullastret**, promote greater knowledge of the archaeological findings, reach new audiences and facilitate access to people who could not visit the area onsite.

The Heritage in Action programme, created and sponsored by the Department of Culture of the Regional Government and the private financial institution Caixabank, provided financing to promote knowledge of the Ullastret settlement and expand its audience through new technologies, notably by appealing to the younger generation, or so called digital natives. Furthermore, improving the projection and access to the Ullastret site would result in boosting the economy of the area.

Over the last twenty years several archaeological interventions have been carried out in Ullastret. However, since 2012, geophysical surveys have been carried out that have allowed the urban framework, the streets and the location of the buildings to be mapped out. It has also been possible to find out what the settlement's wall was like, as well as the moat that surrounded it and the lake that extended in front of the city, which is today completely dried up.

**An interdisciplinary team was created** by Ullastret's cultural heritage management to carry out the project, composed of:

-  members of the Regional Government;
-  employees of the private financial institution Caixabank, which supports the Heritage in Action programme;
-  members of the Museum of Archaeology of Catalonia-Ullastret;
-  archaeologists;
-  specialists in 3D modelling and rendering.



to democratize the access to this cultural heritage site to those people who cannot visit it in person (because of limited mobility, poverty, people at risk of social exclusion, etc.);



to connect with the new generations of digital natives; (We want to modernize and speak their language, not to lag behind the digital shift.)



to provide greater understanding of our origins, of who we are, where we come from and how our world was modelled, in order to contribute to a more inclusive and reflective society;



to link the name of a private institution with a cultural heritage project in the framework of corporate social responsibility initiative;



to prove that videogame and other immersive technologies can help cultural heritage gain wider impact.

Before taking any action, make sure you dedicate time to reflection in order to have a clear picture of the **underlying rationale behind your action plan**. That is: what motivations and drivers set this action plan in motion? (To help you do so, you can refer to Module 1, Unit 1.2 "What is recognised as cultural heritage and why is it valuable?").

This is an important step, because when you get to selecting the **interdisciplinary team that will help you carry out your project**, you will have a clearer idea of the competences needed. Take care over the completeness of competences in the team, as it is a key success factor.

Bear in mind that each of the professionals you will invite to be part of your team has his/her own objectives and interests, which can be very diverse. (As explained in Module 1, Unit 1.1).

Understanding the different points of view and motivations of these professionals will help you step

The archaeologists and technology experts used virtual reality to reconstruct the appearance of the Iberian city in 250 BC. Using the recent discoveries, they added to what was already known. Additionally, work was done on the landscape that surrounded the city and the type of vegetation that existed at the time. The perimeter of the lake and the dirt roads were also analysed. The archaeological information also allowed hypotheses about the height of the houses, their construction systems, the roofs, the uses of different spaces and everyday objects. Some of these objects, such as amphoras, shields or swords, are still preserved in the Archaeology Museum of Catalonia - Ullastret. Those that are not preserved, such as carts or boats, have been rebuilt using theoretical models.

Video game technology was used to create a truly immersive experience for the public, allowing photorealistic quality of the images. A “magic box” was also set up at the archaeological site, allowing visitors to enter a virtual reconstruction of the streets of Ullastret. An example of this virtual reconstruction can be seen at: <http://patrimoni.gencat.cat/es/ullastret3D>

out of your own individual perspective and embrace the fact that **despite having different particular objectives, everyone can work together for a common purpose**. For example, in this specific case the common purpose would be defined as **extending awareness and knowledge of the Iberian city of Ullastret to a wider audience**.

**Find a common higher goal that brings the team together. It's all about common challenges and opportunities. As a cultural heritage manager, you can discover where the interests and visions of different stakeholders converge.**

#### SITUATION/CHALLENGE [CASE/CHALLENGE]

##### **Atlas of the Intangible Heritage of Andalusia**

Andalusia is a region in the south of Spain and is the second largest by geographical extension. It has **great multicultural diversity as well as rich living and dynamic cultural expressions that constitute its intangible heritage**.

In 2008 the Andalusian Institute of Historical Heritage (IAPH), aware of the value and fragility of intangible heritage, decided to create the *Atlas of the Intangible Heritage of Andalusia*. **Due to the complexity of the task that it faced, the IAPH contacted other players to collaborate in the elaboration of this Atlas**, notably: the Andalusian Institute of Flamenco,

#### GUIDELINES/RECOMMENDATIONS

Use **intangible cultural heritage as a generator of additional social value** that reinforces collective feelings of identity, favours processes of co-creativity, cohesion and social dialogue and respect for cultural diversity. (For more information please refer to Module 1, Unit 1.1).

**Involve policy makers and public institutions in the process**, either at local, regional or national level. Bear in mind that traditional arts and crafts guarantee the maintenance of different ecosystems from the cultural and ecological point of view, promoting sustainable development of the territories in which it is generated. Promote the preservation of the indigenous cultural

the Centre for Andalusian Studies, the Institute of Spanish Cultural Heritage, the General Directorate of Cultural Assets, the Rural Development Groups of Andalusia, the Andalusian Universities, and **especially important, the protagonists of the identified intangible heritage.**

Following the guidelines of the Convention for the Safeguarding of the Intangible Heritage (UNESCO, 2003), measures were launched aimed at the identification, documentation, research, valorisation, transmission and revitalization of the Andalusian intangible cultural heritage in its different aspects.

The team decided to use an **anthropological methodology, with participatory work techniques that allowed the creation of a network of collaborators** who not only participated at the time of registration, but who are also able to interact in the future.

The region is divided into eight provinces and 771 municipalities. To carry out the study, intangible heritage was classified into four categories: festive rituals, trades and knowledge, modes of expression, and food and cuisine. To perform the analysis, a methodology for registering and recognizing cultural expressions was developed through a territorial, extensive, evaluative and open approach.

So far, almost 1500 elements of the intangible heritage of Andalusia have been identified, comprising 650 festive rituals, 400 trades and areas of knowledge, 250 modes of expression (including linguistic features, oral expressions, music and dance, games, stories, legends, memory and oral history), and 180 culinary activities and elements.

identity as a way of counteracting the processes of globalization and homogenization, reinforcing the cultural diversity and the unique personality of the territories.

**Foster networking among all the agents involved in the preservation of intangible cultural heritage, and, in particular, encourage citizen participation which reinforces the identity and cultural continuity.** (For more information about participation please refer to Module 4).

As a cultural heritage manager, play your role in helping society acknowledge its responsibility towards cultural heritage. Remember that participatory actions convey a collective duty to protect cultural heritage and its transmission to future generations.

Even when working with tangible cultural heritage (monuments, structures, sites, etc.) think about the possibility of going beyond the physical and explore a potential combination with intangible heritage treasures, such as performing arts, festive events, oral traditions, traditional crafts, etc., which could considerably enrich the visitors' experience. Tangible and intangible heritage have a strong connection and can be perceived as integral parts in a holistic approach. (For more information please refer to Module 1, Unit 1.2).

## SITUATION/CHALLENGE [CASE/CHALLENGE]

### A region facing challenges with the conservation of its cultural heritage

The **Castilla y Leon regional government in Spain faced a challenge**: the complex and costly management of all the aspects that affect the conservation of its rich historical heritage. How could they simplify the processes and reduce the costs of the maintenance and conservation of such a vast cultural heritage?

To solve this problem, the *Santa María la Real* Foundation developed an innovative technological tool called MHS (Monitoring Heritage System). MHS has become an example of good practice in applying technology to the conservation of cultural heritage.

MHS is a digital tool (a combination of hardware and software) that monitors in real time all the aspects that affect the cultural asset, and so makes its management easy, using a single device. The tool optimizes environmental control, structural control, fire protection and the security of the historical asset. It is a flexible technological solution that can be adapted to different heritage sites with different sizes and needs. Through a set of sensors, the tool allows control of all the factors that affect the maintenance of the cultural heritage assets, minimizing the risk of deterioration and avoiding costly investments in restoration.

The measurement and knowledge of what is happening to the cultural heritage site at any given moment allows the possibility of carrying out effective management of the building or site while minimizing energy consumption, improving security and minimizing usage costs. MHS helps maintain the environmental conditions that guarantee its preventative conservation, avoiding the deterioration of the heritage asset and

## GUIDELINES/RECOMMENDATIONS

When you, as manager of cultural heritage, face issues related to the restoration and conservation of a historic asset, first, **seek the collaboration of the regional government, local development agencies and/or the municipalities affected**. Why? Because conservation of cultural heritage has social economic and environmental effects, not only on one single site, building or asset, but also on the territory where it is located. (For further information please refer to Module 1, Units 1.1, 1.2 and 1.4).

The maintenance, conservation and restoration of cultural heritage have implications in other aspects of society. For instance, often, “jobs are created by the conservation, management and promotion of cultural heritage and these activities contribute to sustainable growth and social cohesion”. Also, “high quality interventions in cultural heritage and cultural landscapes contribute to local communities’ wellbeing and to the development of sustainable cultural tourism”<sup>4</sup>.

Cultural heritage is a key driver of social and economic sustainable development across a wide range of policy areas. Therefore, at the very least, the areas of culture, economy, innovation, employment and tourism should all be involved.

When addressing public bodies, convey the message that investment in the protection and good use of cultural heritage has a medium and long-term multiplier effect that reaches beyond the initial plan. Moreover, make it clear that an intelligent, accessible and sustainable heritage becomes a dynamic axis of the territory.

**Teaming up with the public administration (local, regional or national) can give you access to wider**

<sup>4</sup> “Europe in a changing world – Inclusive, innovative and reflective societies”, Horizon 2020 Work Programme.

halting irreparable damage or even its disappearance. (Curative restoration is technically and economically more costly than preventative action).

MHS uses the pulse of heritage to achieve its intelligent management, also guaranteeing its preventative conservation and energy efficiency. It adapts to each space or heritage and has been successfully applied in more than fifty buildings, including three UNESCO World Heritage Sites.

MHS was created by a multidisciplinary team of historians, architects, researchers, engineers and technologists who worked closely with the regional government with the aim of making the comprehensive management of a cultural asset or a set of cultural assets easier.

**possibilities that perhaps you would not be able to access on your own**, either for financial reasons or a lack of human resources needed to accomplish the task. Technology, for example, as shown in the case study, can be expensive when used for one single asset, but it can be profitable when used on a larger scale.

In order to explore what technology could offer to your cultural heritage asset, **do not miss the chance to meet and exchange views with ICT experts**. There is a myriad of possibilities (artificial Intelligence, virtual reality, augmented reality, etc.) which can significantly improve cultural heritage conservation and user's experience.

### 3.2 GUIDELINES referring to Module 2 Efficient Team Working and Effective Interdisciplinary Conflict Resolution

#### SITUATION/CHALLENGE

##### Module 2:

Interdisciplinary Project Management

##### Case study:

The project "Climate for Culture" as a good practice for interdisciplinary cooperation



**Climate for Culture**

Between 2009 and 2014 one of the most challenging European projects in cultural heritage preservation was implemented by a truly interdisciplinary team drawn from the fields of research and economy, as well as social sciences: "Climate for Culture". Find more about the project in **HERITAGE-PRO** Module 2 and at [www.climateforculture.eu](http://www.climateforculture.eu).

We asked the former project coordinator, Dr. Johanna Leissner (Fraunhofer Institute), about her interdisciplinary experiences.

#### GUIDELINES/RECOMMENDATIONS



Dr. Johanna Leissner trained as a chemist in Germany and the USA. Since October 2019 she has been a member of the EU Commission's Expert Group, "Cultural Heritage" (<https://ec.europa.eu/transparency/regexpert/index.cfm?do=search.resultNew>). She has been working in cultural heritage research for over twenty years, with a focus on climate change, environmental pollution, sensor development and sustainability. Her roles have included those of Coordinator of EU project Climate for Culture (2009-2014; [www.climateforculture.eu](http://www.climateforculture.eu)); German delegate for the Council of Europe Strategy, "European Cultural Heritage in the 21st century" and Scientific Representative for

### HERITAGE-PRO: What were the biggest challenges in achieving the cooperation of the very different disciplines in the project?

**Johanna Leissner:** In the EU project we had 29 different institutions from 16 EU countries. The first challenge was to break down the issue of the impact of climate change on cultural heritage so that each partner had a concrete idea of what work to start with. Another challenge was the fact that the topic of climate change is highly complex, and that this too had to be translated into the various “technical languages”. At this stage, it was also necessary to overcome psychological inhibitions; namely to admit that one did not know certain things.

In our team there were physicists, chemists, wall painting restorers, museum managers, economists and building physicists. As well this mix, there were younger and older team members; female and male, and also people from the North, South, West and East, who brought different cultural differences. Everyone had

Fraunhofer-Gesellschaft at the European Union in Brussels (since 2005). She was also co-founder of the German Research Alliance for the Protection of Cultural Heritage in 2008 and of the Fraunhofer Sustainability Network. From 2001 till 2005 she was the National Expert of the Federal Republic of Germany and was responsible for “Technologies for the Protection of the European Cultural Heritage” at the European Commission in Brussels.

Anyone who, like Dr. Johanna Leissner, has worked for five years in an interdisciplinary manner in the highly innovative field of cultural heritage preservation can be considered an expert on the requirements needed for this special form of cooperation.

From her statements, clear recommendations can be derived which are of significant relevance for successful interdisciplinary project management.

### Recommendations from the practitioner:

Each partner is often initially convinced that their own knowledge is the most important. This is understandable, as an awareness of the knowledge of other disciplines can, of course, not be assumed.

Therefore:



**Install mechanisms** such as special exchange sessions or informal social communication events right from the start to share each other's knowledge and, above all, to keep it accessible.



**Agree on the contents and objectives** of the joint work as a team. Organise the work plan and work packages to include collaborative tasks, and allow participants to engage in groupwork in every team meeting.



**Clarify: What do we want to achieve?** E.g., use balanced scorecards to identify respective goals. Then, how do we want to achieve it? Professionally, personally, in terms of atmosphere? What is and isn't important to the individual participants?



**Identify personal needs of colleagues** that are

**different ideas, which first had to be harmonized.**

This did not happen by itself – we hired a **coach for interdisciplinary cooperation**: Björn Ekelund from Norway, who brought with him his Icebreaker Method. This joint workshop lasted two days and opened our eyes to each other's perspectives. Nobody had to be "ashamed" if they didn't know or understand something. It was all about listening and respect for each other. That helped a lot.

#### HERITAGE-PRO: How would you define success in an interdisciplinary project?

**Johanna Leissner:** Respect, tolerance, listening, being curious, asking supposedly "stupid questions", eating and drinking together, getting to know each other as people, not only as experts. In such projects, however, sufficient time must be planned for the three-year duration with a meticulous agenda. This can leave little room for real exchange and new ideas if highly complex issues are to be explored.

**HERITAGE-PRO:** Thank you, Dr. Leissner.

considered part of the team, such as childcare (or other people in need of care), disabilities, long distance journeys, etc. You can find this out by talking to team members individually during coffee breaks and social events.



**Involve an external coach** who can check the quality of cooperation and the progress of the project at regular intervals through monitoring. Come to a joint agreement in the team about when and under which conditions this should happen.



**Consider the possible effects** of individual colleagues only working in the project temporarily, as they may only carry out very limited tasks.



**Identify tasks that should be financed by all partners** through a common budget. (These could range from hiring a professional coach to a buying a small birthday present).

In **HERITAGE-PRO** - Module 2, Units 1 and 2, you will find further suggestions for this.

In interdisciplinary projects, "success" is defined differently to the way that you might be used to:



**Success is long-term.** Consider and communicate this accordingly: your cultural heritage is hundreds of years old, and your project should contribute to its preservation for another hundred years.



**Allow for more time for coordination** - you will need it. Not only for interdisciplinary exchange, but also to be able to deal with imponderables. We often don't know what a restoration can bring to light.

In Unit 5 of the **HERITAGE-PRO** Module 2 you will find inspiration on how to manage interdisciplinary sustainability.



## SITUATION/CHALLENGE

### Module 2:

Interdisciplinary Project Management

### Expert Experiences:

conservator Ursula Fuhrer

**HERITAGE-PRO: Cultural heritage conservation requires a great many different disciplines to work together. In your long years of practice, have you actually observed changes in the management of the associated processes or are they still strongly hierarchically organized implementations?**

**Ursula Fuhrer:** Both. This always depends on the people involved and their personal background, attitudes and own weightings. Overall, it is considerably hierarchically organized in implementations, which can sometimes take a different course for those who have been working together on the projects' construction sites for a longer period of time - **here there are agreements at eye level and in direct communication.** The same applies to some em-

## GUIDELINES/RECOMMENDATIONS



Ursula Fuhrer is a university-qualified conservator and studied conservation and technology of paintings and polychrome sculptures at the Institute for Painting Technology at the Academy of Fine Arts in Stuttgart (1978-82). She then worked as a conservator at the Hessisches Landesmuseum in Darmstadt and from 1988 to 1999 she was head of the conservation department at the German Historical Museum in Berlin.

Since 2000 she has been self-employed as part of a studio community in Stuttgart.

She has worked abroad numerous times, including professional stays in Rome and Jersey, the Channel Islands, among others. Furthermore, she has taught at Hochschule der Künste (University of the Arts) in Berlin; at the University of Applied Sciences (Hochschule für Technik und Wirtschaft) in Berlin, and at Tainan National University of Arts in Taiwan.

[www.restaurierungszentrum-stuttgart.de](http://www.restaurierungszentrum-stuttgart.de)

### Recommendations from the practitioner:



**Mutual trust plays a particularly important role in interdisciplinary work processes. Trust does not develop by itself;** it develops in small steps. A good manager knows how to create trust in a team based on mutual knowledge, fairness and continuous exchange. Therefore, include social activities in your team meetings or group sessions – or just go for a beer in the evening.



**The right sequence of implementation steps can be planned** – either with traditional or digital tools. Permanent feedback from all parties involved helps to correctly assess and plan steps. E.g., you might use network planning methods which show interdependences of work packages.

employees of institutions with which we have been working for years.

However, for decades there has been a lack of basic knowledge among project planners regarding the **planning of the sequence of the implementation steps**. This sometimes has serious effects on climatic conditions such as dust and dirt becoming a problem, etc.

Restorations of movable art (which are carried out on site) should always be the last task before completion. It is counterproductive, for example, if the floor is sanded down and slots for the electrical system are opened and then plastered again during this time, which has surprisingly often been the case during my professional career.

However, if our part of the on-site work is at the end of the restoration process, it can also mean that we have to be very flexible, as our assignment on site could then easily be postponed for a few months if there are **unexpected problems with previous work** and there are delays. We are therefore experienced in flexible scheduling.

**HERITAGE-PRO: You've taught many restorers and accompanied them during their professional careers. Are interdisciplinary requirements sufficiently taken into account in university education and further training courses?**

**Ursula Fuhrer:** Looking back on my own training, this was not taken into account, at least not in my studies. However, since a 32-month basic internship was required before my studies (today it is shorter and lasts twelve months), my fellow students and I were able to get to know at least some of the processes involved in the restoration of the interiors of large churches, as well as in everyday museum work, and so gained experience during this time.



In restoration projects, risks and unforeseeable problems are the order of the day. Even the best planning can be shaken by these issues and delays require additional organisation. This makes it all the more important that a risk analysis is carried out at the very beginning of each project, and that this is done by the entire team with all the players involved. Collect, describe, and document risks which might occur, using the experiences of all team members. Mitigation measures can be derived from the risk assessment.

In Unit 1 of the **HERITAGE-PRO** Training Module 2 on efficient project management you will learn more about the importance of trust in interdisciplinary teams. Unit 4 is dedicated to risk management in interdisciplinary teams. You can learn even more about risk management methods here:

<https://de.wikipedia.org/wiki/Einflussmatrix>.

[https://de.wikipedia.org/wiki/Papiercomputer\\_\(Vester\)](https://de.wikipedia.org/wiki/Papiercomputer_(Vester))

[https://en.wikipedia.org/wiki/Frederic\\_Vester](https://en.wikipedia.org/wiki/Frederic_Vester)

In spite of its relevance, interdisciplinary project management still does not occupy the place that it should in university education and in professional training courses. Even more important are vocational training opportunities such as the training modules of **HERITAGE-PRO**. However, as a cultural heritage manager you can communicate this need to your own interns, trainees and all interested parties by conveying the topic through courses and seminars that you may offer yourself. Relentlessly point out to education providers that it is impossible to preserve cultural heritage without interdisciplinary sensitivity and knowledge.

When restoration students do an internship in our studio, they are involved in on-site work in churches, and we always point out conditions that are problematic for us. They also experience **quick and direct arrangements with other trades.**

As far as I am informed about the teaching content of the individual courses, interdisciplinary collaboration still **does not play a major role in the basic training.**

**HERITAGE-PRO: If you could wish for better cooperation in cultural heritage conservation projects, what would be at the top of your wish list?**

**Ursula Fuhrer:** That before any **measure is taken, there is a meeting and an agreement among those involved.** The first meeting should not take place on site and shouldn't be left until just before we start work. In any case: cooperation at eye level!

"Constant dripping wears away the stone." It seems that this saying could also be applied to interdisciplinary work in cultural heritage conservation.

Before the start of a restoration project, **all those involved should meet around the same table** to discuss the procedures.

All parties should be involved through **mutual understanding and binding agreements.**

Always cooperate at eye level with all trades!

Read more about these essentials of interdisciplinary management in Units 2, 3 and 4 of **HERITAGE-PRO** Training Module 2.

## SITUATION/CHALLENGE

### Module 2:

Interdisciplinary Project Management

**Management Plans as Tools for Fostering Interdisciplinary Project Management**

**Patricia Weeks, Historic Environment Scotland**

Patricia Weeks is the authoress of the Management Plan for the Antonine Wall – a Roman ruin and UNESCO World Heritage Site – and a crown witness of numerous interdisciplinary processes linked to the implementation of the management plan at the Antonine Wall.

A management plan is required by UNESCO to specify how the outstanding universal value of the World Heritage Site (WHS) will be protected and managed for future generations. The Management Plan provides a strategic framework for achieving the protection and management of the cultural and natural assets in the WHS and identifies specific aims and objectives for implementation of the

## GUIDELINES/RECOMMENDATIONS



Patricia Weeks is the Deputy Head of World Heritage at Historic Environment Scotland, and the coordinator for the Antonine Wall since 2010. She has worked at Historic Environment Scotland (and its predecessor organisation, Historic Scotland) for 15 years, in a range of roles from Education Officer to Cultural Resource Manager to Senior Inspector of Ancient Monuments. Prior to that she spent seven years as an archaeology curator in a local authority museum. She has run a wide variety of community outreach projects and is especially interested in engagement approaches and co-curation/co-development, to ensure projects best fit the needs

framework within the WHS. In this case, the plan is for the entire length of the Antonine Wall, which spans five local authority areas.

**HERITAGE-PRO: How many different disciplines and institutions did you work with during the preparation of the Management Plan and which discipline or institution required the most coordination?**

**Patricia Weeks:** The Management Plan is a document developed for and used by Historic Environment Scotland and the five local authorities (West Dunbartonshire, Glasgow City, East Dunbartonshire, North Lanark, and Falkirk) along the line of the Antonine Wall World Heritage Site. It needs to align with each of their strategic plans, as well as justifying funding requests through clear actions and outcomes that meet their organisational needs and priorities. The content in the plan is created with significant stakeholder consultation and input: public bodies in areas such as tourism, transport, forestry and the environment; community organisations, local history societies and community councils; museums and heritage organisations; education and research organisations; and different departments within the local authorities such as planning, arts and heritage. The hardest part of having such a wide range of stakeholders is managing the hugely varied and often conflicting requests for actions and outcomes. There is no hope of being able to achieve everything they all want, so actions and outcomes are narrowed down to where there is greatest consensus or where individual actions benefit the largest group of stakeholders and partners.

of the communities they are being proposed for. She led the development of the 'Rediscovering the Antonine Wall Project' on behalf of the Antonine Wall Management Plan Steering Group, which now has four staff members and is one year into a three-year project worth £2.1 million.

Email: [patricia.weeks@hes.scot](mailto:patricia.weeks@hes.scot)

**Recommendations from the practitioner:**



Stakeholders to be involved in an interdisciplinary project management have their own strategic plans which need to be **aligned to a common project**.



Justification of (public) co-funding is a sensitive issue which has to be supported by **clear actions and outcomes** that might have to meet specific needs and priorities of the stakeholders.



Be aware that **you will never be able to meet the expectations or demands of all stakeholders**. Rather, it is always about the ability of all sides to compromise – even at the cost of finding the lowest common denominator.



Sometimes only **majority decisions** are possible. Read more in Module 4 (Participation), chapter 4.6.2, Unit 2, about tools and approaches.

In **HERITAGE-PRO** Module 2 (Interdisciplinary Project Management), Chapter 2.9, Unit 3, you can learn more about conflict resolutions that avoid any stakeholder losing face.

**HERITAGE-PRO: Experience shows that balancing particular interests is a major task. How did you do that?**

**Patricia Weeks:** We were honest and had frank discussions. At the outset of the consultation, we made clear the areas we couldn't focus on whether for legal, financial or practical reasons. Beyond this, we were open to discuss any ideas that the stakeholders wanted. Listening was key; sometimes a group just wanted to be heard and felt that their views had previously been ignored. Many good ideas came from active listening, questioning, drawing out the underlying needs, removing the emotional strands and using a neutral facilitator for the sessions. We worked to understand the alignment between local, national and international interests. Many stakeholders didn't feel the World Heritage status was relevant to them, yet the Antonine Wall was an asset they could understand for community or social benefit rather than tourism or economic interests. We needed to identify projects and outcomes that would align these strands effectively. Where areas were obviously conflicted, we had further discussions with those parties to reach a consensus and a route that allowed maximum mutual benefits, even if the solution did not achieve all their desired goals. We were still unable to please all our stakeholders completely, but we succeeded in creating a strong central grouping of key organisations that allowed us to truly effect change.

**HERITAGE-PRO: Did the formulation of the plan help you in the implementation phase? And if so, in what way?**

**Patricia Weeks:** Yes, by ensuring that we had consulted as widely as possible, we allowed many voices to be heard, and ensured that the actions we proposed benefited as many as possible. Then, the smooth implementation of the Plan was in all their interests. That doesn't mean it removed all problems. There were still



There might be areas where even a good interdisciplinary partnership cannot overcome the barriers. These are usually of a financial, legal or regulatory nature. This has to be communicated honestly as no-go areas from the very beginning.



Your interests in heritage preservation could be completely irrelevant to other stakeholders. Try to find out what other interests look like and whether there are alternative good ideas behind them.



Identify outcomes and benefits for different stakeholders with different methods such as preparatory meetings, small group discussions, or bilateral meetings in order to get a clear understanding of the background of your stakeholders



Active listening is a success factor.

How to handle considerable differences between stakeholders' interests is discussed in **HERITAGE-PRO** Module 4 (Participation).

Learn more about active listening in **HERITAGE-PRO** Module 5, (Effective Communication). Also, have a look at Chapter 5.0, learning Unit 1.

Stakeholders' ownership of envisaged results is your most important **guarantee for successful delivery**.

Give yourself time today to **think about all possible stakeholders**. Contact two of them tomorrow and listen to them the following day. They might come up with recommendations on other parties you should also include – perhaps people you had not thought of.

financial, administrative and legal hurdles to overcome in the delivery phase, but those we approached to collaborate with for individual projects or actions, drawn from the Plan, could see where it fitted in to their wider ambitions and were happier to support and fight on our behalf. We had a stronger sense of what the Wall meant to public bodies and to local communities and could see where we needed to guide the work that was happening to balance economic, social and environmental concerns. We were also able to align different projects and grasp opportunities more quickly as they emerged, as we had a clear vision for the site and a consensus of what everyone wanted.

Grasp upcoming new opportunities and make the most of spill-over effects during the implementation of a project!

Striving for **interdisciplinary sustainability is not only a horizontal issue** in each implementation step; it is also a matter of quality.

In **HERITAGE-PRO** Module 2 (Interdisciplinary Project Management), Chapter 2.11, Unit 5, you can find inspiration for tackling sustainability.

### 3.3 GUIDELINES referring to Module 3 Valorisation of Cultural Heritage

#### SITUATION/CHALLENGE



#### Prof. Christer Gustafsson

- Full Professor in Conservation at Uppsala University, Sweden;
- Professor (hon.) at Nanjing University in China;
- Faculty member at Turin Faculty of Development (Politecnico di Torino and Università degli Studi di Torino);

Other roles:

- ICOMOS Advisory Committee Officer;
- Secretary-General for ICOMOS International Scientific Committee on Economics of Conservation;
- Vice chairman of the expert panel for European Heritage Label (appointed by the European Commission).

One of the founders of the Halland Model.

#### GUIDELINES/RECOMMENDATIONS

Prof. Christer Gustafsson is interviewed here by **Prof. h.c. Dietmar Wiegand**, head of the research group Real Estate Development at Vienna University of Technology (red.tuwien.ac.at).

**Dietmar Wiegand (DW):** Christer, could you please tell us about the famous Halland Model Project and the lessons we can learn from it concerning the need to preserve and valorise a huge portfolio of cultural heritage – especially monuments – while facing a lack of appropriate resources and not only financial ones!

**Christer Gustafsson (CG):** The story about the Halland Model project. Firstly, today I recognize a feeling which I had twenty, or even thirty years ago now, during a financial crisis in Sweden. It was not as dramatic as today with the coronavirus, but it was for my generation the very first experience of a **recession**. This was a real recession, not just a few difficult years. It hit us like the financial crisis of 2008 did in many countries. What happened was that the economy more or less collapsed, and this happened in just a couple of weeks.

So, it was from all-time high records for times of prosperity at the beginning of the 1990s to a sudden catastrophe, and industries just collapsed<sup>5</sup>. It especially hit the construction industry, as nobody wanted to invest in construction and nobody wanted to invest in new buildings, etc. The unemployment rate again became extremely high, especially in the this industry, although I don't remember the exact figures right now. In the region that I was working in at the time, which was the Halland region on the West Coast of Sweden, one week it was 10% unemployment in the construction industry, the next week it was 20%, and so it continued. After a couple of months, unemployment stood at almost 40%.

<sup>5</sup> Sweden's banking sector went through a severe crisis from 1990 to 1992 due to a real estate bubble that burst 1990.

If you are looking for **state funding** for the conservation, renovation or valorisation of cultural heritage (CH), **think about the positive (external) effects the measures could have in other sectors of public interest**. Use the pentagon of public interest introduced in **HERITAGE-PRO Module 3** to a) define the targets of valorisation (e.g. cultural, economic); and b) to understand and optimise the external effects (e.g. economic social, environmental).

Funding for purposes other than conservation, such as the creation of jobs and income or qualification of labour forces could “concurrently” conserve CH and increase its cultural value. Or vice versa: valorisation of CH concerning its cultural value could be used, e.g., to create jobs and income and qualified labour forces. Ask yourself: what are possible starting points of valorisation? Who could benefit from the valorisation of cultural heritage?

**Be prepared/prepare yourself for the fact that the valorisation of CH can be implemented by an organisation that is not primarily interested in CH. Think about, optimize and document what you/your measures could bring to others rather than what you expect from others!**

So, me and my colleagues in the conservation or the cultural heritage sector thought that these **bad times could also maybe be a challenge; an opportunity** for us, because we thought – or realized – that the national government would act sooner or later and it would probably be some “political subsidy package”, targeting the labour market and seeing if they could save existing jobs, but maybe also create new ones. And, we also knew, from the story of my experience, that in times of recession the government wants to invest in public building – i.e. in construction – and also to build public constructions, or roads, so we were prepared for this. And we thought that this could be an opportunity and that maybe they could invest in cultural heritage.

As the cultural heritage sector, especially in Halland, **we were prepared for this because we had developed a lot of planning – heritage planning programmes and policy documents – at the local level.** All of the municipalities had what we could call a cultural heritage programme and most of the towns and bigger villages also had what we call a protection plan. That meant that we had mapped all historic buildings in the region; we had detailed information and knowledge about cultural heritage buildings. We thought that maybe we could start to see if some of these buildings were in need of more than ordinary maintenance, conservation, or restoration. We also thought that maybe we could see if this could be a new package programme that we might be part of, and that it could be possible to have some money invested in the restoration.

The situation was that we had the policy documents and the protection plans, but we didn't have a budget; we didn't have any money for the conservation of cultural heritage. At that time, the regional budget was more or less nothing, and when I say more or less nothing, I mean more nothing than anything else.

**Use a similar or adapted approach when looking for private investors and sustainable regional economic impacts.** Ask yourself: which type of business could benefit from the valorised CH? Can the CH become infrastructure for business, a public service, or a driver of regional development? Which investors, public funds or charity organisations could be interested in valorising CH?

To find the best ideas and to implement them, **gather the best and most creative people around a table and use creative methods** to develop the best ideas. And remember: when collecting ideas there are no bad ones, and the phrase “this won't work” is strictly forbidden 😊

**Read more about this topic in HERITAGE-PRO Module 3 (Valorisation of Cultural Heritage) Chapter 3.2, Unit 4 – Success factors: The Right People “Around the Table”**










I think we can say that in the year 1991 the annual budget in the region of Halland was around €6000, so it was really nothing. The year after it was increased to €10.000, and maybe to €13.000 in 1993, but it was still really nothing. That was also another reason: we really were looking for money. We needed to see if we could find some money for the restoration of these buildings we had selected and analysed, and which had more significance than other buildings.

Another problem for the heritage sector was that **we did not have any construction workers that could actually do the job in the region.** The construction industry was in a world where the society was very well developed and there were very good relations between, say, construction companies and trade unions, as well between ministries and the government at a national level, so they were working very closely together. Amongst other things, they had developed training schemes for construction workers which they agreed upon on a yearly basis during annual national negotiations – to become a skilled construction worker and be fully paid you need training, of course. That meant that there were first three years of training in secondary school, and after that it was more or less three years as an apprentice before you were fully paid. So it was, more or less, a six-year training programme.

Throughout these six years, no time was spent on restoration or conservation, but also not even on renovation. The objective for the training programme was only to build new constructions or buildings. We saw a problem there of course, because in the middle of the 1990s, when all the construction workers on the labour market were trained within this programme, we didn't have anyone that was actually trained in traditional building techniques at all.

In Halland I knew that we had ten individuals who could do this because they had had extra training, especially

Analyse the situation you are in:

-  stakeholder (organisation and individuals)
-  resources and capabilities they have
-  their interests
-  relation with stakeholder
-  possible roles of stakeholders
-  ways to motivate them
-  possible roles of stakeholders

“Analysing” here means gathering data and information for a **systemic understanding** of the situation you are in. The systemic understanding helps to identify possible ways to change the situation and solve the problem.

**For more about systemic thinking read HERITAGE-PRO Module 3, Chapter 3.2, Unit 3 – Valorisation of CH – The Concept of Appropriate Use**

Not all information is traceable on the internet! You will need to talk with experienced people with tacit knowledge. Not all relevant information can be known from the beginning. Be alert and ready for unexpected parts of the puzzle – for information that you were not even looking for, but which gives you a deep systemic understanding of the situation, or which makes it necessary to change the situation and manage the risks.

in using traditional craftsmanship to build old sailing boats in the traditional way. They knew something about wood and timber techniques, and so on. So, let's say in 1993 it was just ten individuals that had experience from traditional craftsmanship and traditional buildings and materials. The other 4000 construction workers in the region were only trained in modern techniques. So, that meant that in the heritage sector – which I was partly responsible for – during a traditional or ordinary restoration project we, the conservation officers, would be the only ones involved in the project who knew anything about historic buildings. Of course, we had been trained at university - we were theoretically trained but we weren't doing the job and we didn't participate in the actual restoration. We were more advisors, or sometimes supervisors, but we didn't participate.

So, we had to convince the individual construction workers about the fantastic qualities of traditional techniques and traditional materials. That was the situation: a fully planned region with hundreds of buildings we had listed at regional and local levels, and sometimes also at national level, but we didn't have any money in the cultural heritage sector and we didn't have any people that could do the job.

**DW:** Did I get this right: the conservation and preservation of the buildings, of the 180 objects that were listed, was financed by the ministry of labour due to this financial crisis? And you were able to identify that by refurbishing and renovating these monuments, you would be able to create jobs and income, and that was what the minister was looking for? The second circumstance – and this is what I would call a success factor – you could do this because you were prepared. You had the list of buildings and you had the training schemes. Did I get you right?

**CG:** Yes, but it's a little bit more complicated of course.

Always avoid clichés!

Analyse precisely!

See the potentials and not only the deficits!

Assure the **completeness of capabilities and resources** in the project team. Missing capabilities and resources endanger **the success of the project**.  
**Read more about it in HERITAGE-PRO Module 3, Chapter 3.2, Unit 4 – Success Factors: The Right People “Around the Table”**

The CH sector is competing with other sectors for public funding, e.g., when an employment-creation programme for the construction sector is launched. This competitive situation has consequences. Therefore:



**be proactive;**



**think outside the box;**



**give yourself time to think about the interest of a certain organisation or person;**



**give yourself time to think about how to persuade a certain organisation or person – this might involve the creation of figures – to make benefits (e.g., the creation of jobs) transparent and measurable;**

**DW:** As usual.

**CG:** Yes. So, first of all, the situation in 1993 or 1992, when the recession struck Sweden, was that the heritage sector was one of the smallest sectors. Nobody really cared about it. We had a preservation programme for all of the municipalities which was for the towns and sometimes also bigger villages. From a planning perspective we were very well developed. But when it came to the financial situation, we didn't have any money at all. And when it came to capacity, we didn't have any people that could do the job. So suddenly we had this new situation, and what we did – me and my colleagues – was that we realized, sooner or later there would be a national programme and that it would probably be targeting the construction industry. We realized that what we had, which was historic buildings at risk, could be used for labour market projects in which you hire unemployed people to restore them. And we said, 'Yes; that is an opportunity.' So before the programme was launched, that was me: I took my car and visited most of these buildings that we had presented in these preservation programmes and just made a very simple inventory; a survey where I estimated how many people we would need to restore a building. To be honest I was not an expert in this field, but at least I had the figure of how many people and how many months they would have to spend on each site. And that was the most important thing. Then I described the buildings very briefly, maybe I said that one was red, for example, and also mentioned the material it was built on. The focus was instead on how many workers were needed for the restoration, and for how long. When this programme was announced, I had a list of forty buildings that we could start to restore almost immediately. That was the **competitive advantage** to other sectors in society, because other sectors were not prepared for this. So even if they wanted to rebuild schools or hospitals or kindergartens,



**find out what the competitive advantages of funding the CH sector are, compared with funding other sectors. (Refer also to the next chapter.)**

These guidelines are also valid for private or intermediate funding or donations. Of course, these strategies and means have to be adapted. **Learn more about other cases in HERITAGE-PRO Module 3, Chapter 3.4. "Cases and Additional Readings"**

or whatever, they couldn't start immediately. They had to plan it. They would need a year before they could start.



**DW:** So, you described the activities that should be carried out and the number of jobs that could be created. You prepared it tailor-made for the ministry of labour – for labour-market measures; not for historians.

**CG:** Exactly. And that was one of the most important things: that we left our sector and changed our mindset on how to prosper. We understood that we needed to be more demand-driven than we usually were. Because we in the cultural heritage sector are usually supply-driven, saying that we have so many valuable things that we need to take care of. **We changed the way we communicated, and so we said, “We can help you;** we understand that you need to create new jobs or save existing ones. Here we have a lot of workplaces.”


Then, **we developed an understanding of the situation,** so we could say that if you invest in restoration instead of new construction, it means it's more labour-intensive. This means that this person that you want to help – this individual, this unemployed construction worker – can be kept on by us for a longer period than if he's building a new dressing room for a local football team or whatever. So – and this was also very important – we said that **we will not disturb the existing market;** we will not use governmental money for unequal competition in the small but still existent construction market. And this was very important, that we didn't compete. And why didn't we compete? Because we were **only targeting historic buildings at risk** that had not been restored during this time of prosperity that we had had in the previous five or ten years, meaning that it was by definition outside the existing market. So that meant that we could use public funding money for these buildings even if they

Again: give yourself time to think about what you/your measures could bring to others rather than what you expect from others! **Optimize and document these benefits.** Make them measurable.




Again: give yourself time to discover the **competitive advantages of funding the CH sector** compared with funding of other sectors. E.g.:

-  work is labour-intensive;
-  the same amount of public funding invested in the conservation of CH creates more jobs (directly) than an investment in roads, because a huge percentage of investments in roads are needed for physical resources.


And: **also give yourself time to deal with counterarguments and with aspects that could prevent public funding, private investments, or donations. Quite common counterarguments for public funding are that public funding:**

-  **disturbs existing markets;**
-  creates illegal, competitive advantages;
-  decelerates innovation;
-  conflicts with European legislation, etc.

**Quite common counterarguments for private investments are:**

-  high risks;
-  low yields ;
-  not being in line with the brand mission of the enterprise.

A quite common counterargument for social entrepreneurs is:

-  not being in line with the social or ecological target of the enterprise.

were privately owned. This was important because the **Labour Market Board were not so happy to invest in privately-owned buildings. But for the Heritage Board, the heritage budget *could* be spent on privately-owned buildings.**

Since then we have had this cooperation. I remember that for the very first project we did together, we had a press conference which we invited all the tabloids and all these kinds of journalists to. So, we gave a very long, open-minded and transparent presentation on what we were doing. We were very keen that an overall objective of what we were doing with the programme should be to save existing jobs. **We said that we would save jobs, but at the same time would also save a craftsmanship** that is more or less forgotten. Furthermore, we explained that rather than doing this in a workshop or at school, we would do it on existing buildings at risk, meaning that we would also preserve this heritage, which is often more important for local people than for others. It was accepted, and the tabloids thought it was good, and made **positive headlines** about it, and that was the starting point. So, from that we were able to develop it.

**DW:** How did you solve the competition problem? Were the jobs created in a governmental enterprise or in a private enterprise? Where were the workers employed?

**CG:** We did it like this: we organized it. It was the municipalities who owned the project and they owned the tendering procedures, so to say. So, the municipalities were the developers. They had this tender for a contract with the construction companies for a couple of years. The municipalities had these contracts that were valid for a couple of years. This meant that we could use their contracts. We didn't need to go for public tendering for each project because it had already been done by the municipalities.

Think about **cooperation and strategic partnerships** that might solve problems or counterarguments such as unequal competition. In our case this could be co-operation between the labour market board and the heritage board.

Think about **interdisciplinary cooperation** that might solve problems or counterarguments. For example, the danger of unequal competition is a topic for lawyers.

**Develop an appropriate strategy for public relations.** In our case, transparency and a very clear key message: "We will save the jobs of construction workers as well as saving our craftsmanship and buildings at risk."

**Read more about it: HERITAGE-PRO Module 3, Chapter 3.2, Unit 3 – Valorisation of CH – The Concept of Appropriate Use**

**DW:** So, you used existing contracts between the municipalities and the construction companies that could be extended.

**CG:** Exactly.

**DW:** I think this **organizational creativity is very important for the valorisation of cultural heritage.**

**CG:** That was also very important because we thought from the very beginning that my organisation, which was the museum, could do it. But afterwards we immediately realised that we didn't have the capacity or the experience, or that we were not supposed to play this part due to issues with insurance and for long-term guarantees. I mean, how could we guarantee that the restoration would be in good condition for ten years? We didn't have this kind of budget if something went wrong. So, we needed real companies, and these real companies were on the existing market, so the first one we had a contract with...

**DW:** Christer, so was there no state company available? Because this could also have been a possibility to solve the problem; to use a state company for direct contracting without a tender action.

**CG:** No, we didn't have this – of course not. There used to be one construction company that was owned by trade unions, but that was one of the first that went bankrupt during this crisis in 1993.

**DW:** So, you had to do it with private companies, and you used existing contracts.

**CG:** Yes, and that was interesting because we were one of five partners in what is called the Halland Model Consortium. This was made up first of the Labour Market Board, of course, who had more or less all the money.

Give yourself time to think about the **organisational structure for the execution of the changes/project**. Or even try to get the best people for that topic around the table for an innovation process concerning organisational structure for the execution of the project – sometimes called **deal structures**.

And again, remember: when collecting ideas: there are no bad ones, and “this won't work” is strictly forbidden



**Read more about it: HERITAGE-PRO Module 3, Chapter 3.2.4, Unit 4 – Success Factors: The Right People “Around the Table”**

Then there was the County Administrative Board, which is the regional level of the national government. At the time, they were responsible for regional development, but also for grants for conservation projects. And then there was the museum which I was working for, which was the cultural heritage part, then also the trade union, as well as the employers' association in the construction industries. So, we said that the Halland Model was owned by the industry as a whole. That was not really true, but that was the idea. Because every year the industry, according to the, let's say the Swedish welfare system, made a national agreement for salaries and everything that the employers and the trade unions do, but also for training programmes. So, they decided what should the training programmes should consist of together with those at the regional level. After a couple of weeks or months they had a new negotiation at regional level. So, in Halland, if the unemployed construction workers participated in a Halland Model project, they could use this in the training programme. We called it "the book" because they had to, you know, fill in the boxes in a book saying that they had participated in the different parts of a construction project. So, they would know how to build a kitchen, a bathroom and so on.

**DW:** So, the construction industry confirmed that the construction workers had attained certain capabilities. Not the school, but the industry itself. That's quite a modern approach.

**CG:** Yes.

**CG:** ... After the first or second building that we had conserved, we realised that **the conservation project doesn't end when we finish the restoration. It more or less starts then, because at that point it can be used for a new purpose.**

Public funding can and should serve more than one public target at the same time! **Use the pentagon of public interest introduced in HERITAGE-PRO Module 3** to find public targets that could be combined and achieved at simultaneously.

We didn't say that it was adaptive reuse at the time, but we started to plan new activities. And that was **something completely new for the heritage sector**, because we had never been involved in this part of the project. We had just been a part of the first phases: the preservation, protection and maybe the conservation. But we didn't have any responsibility with what happened afterwards. And this was the time when Sweden became a member of the EU and we had started to have this regional development programme planning. That meant that the heritage sector could also be part of this with the Halland Model.

We used the Halland Model to see if we could **combine what we were doing with other sectors of society**. That meant, for example, that we could ask the **tourist sector**, "What are your needs? What do you want? What are your opportunities? And how can we combine the Halland Model budget with your own, and with your activities?" This also applied to the **environmental sector and the educational sector**, etc. We gathered all these participants to join a team at a regional level **where different sectors of the society could tell us what they needed, and we started to look for buildings that were suitable for these ideas**. This could, for example, take the form a list of centres for hikers in the forests of the South. We would ask, "Do we have a building in the South that is suitable to host these people, along with some information and maybe even a small coffee shop or whatever?" It was interesting, because suddenly it was more about seeing if we could combine our restoration and conservation ambitions with what we call today adaptive reuse. This would become important.

**DW:** So you started with creating jobs in what we call upstream, and later on you took care of creating jobs in the so-called downstream, such as the tourism industry or many other sectors that are not necessarily directly

The conservation of CH can contribute to the different corners identified in Michael Porter's Diamond Model. Use the Diamond Model to identify how the conservation of CH can contribute to the competitive advantages of a region as well as to the companies located in the region.

Certain businesses are classed as so called "cluster businesses"<sup>6</sup>, e.g., cultural tourism. Think about how the conservation of CH can contribute to an existing local business cluster or contribute to the creation of a new local business cluster.

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<sup>6</sup> "In the clusters the synergies between the players, integration of organisations from the non-profit or governmental sectors providing, e.g., education or cultural work, are some success factors." Learning **HERITAGE-PRO** Module 3.1.2. – Challenges

An **appropriate use/adaptive reuse** is the best way to conserve a monument or heritage site. It creates positive effects like jobs and income, and, when conservation is finished, reduces the amount of



related to the cultural heritage, meaning that cultural heritage became infrastructure for them. That's very interesting. And how were you able to manage to make that shift? Because I know many historians that can take care of the upstream by organizing the renovation of a monument, for example, but I know very few people who can take care of the downstream – and most of them come from a business administration background.

**CG:** After a while – I would say one, two or three years – we saw that the impact of the whole project was much higher if we had a clear focus on the adaptive reuse for the new activities. Because then we included other people that made it stronger. It was also other sectors of society, or other interests of society, meaning that we also had other funding and we also guaranteed that if we had some activities, there would be somebody paying the rent, meaning that we would have money in the future for further conservation and restoration, and hopefully for future maintenance, which is important.

I did a survey maybe two or three years ago, which was fifteen or twenty years after completing this project. More or less, in every single building we could find the same activity. Of course, they have increased the number of employees since then. When we finished on the Halland Model we created perhaps 200 or 300 new jobs, which has risen to at least 300 to 500 new jobs over this period. And maybe the most important thing was that they were sustainable. I don't know what will happen today, in these times of the Coronavirus, But back then it was not short-term, short ideas that depend on public grants, for example. It was real jobs and real companies.

**DW:** So, finding the right use is crucial to create sustainable renovation and maintenance later on and to create jobs with long-term perspective.

necessary public funding for the conservation and for maintenance – future owners and/or users will invest and pay rent.

Give yourself time or start an innovation process with others. Also: find an appropriate use for your monument or heritage site that does not endanger the CH and that creates as many positive effects on the pentagon of public interest at the same time.

**Read more about it: HERITAGE-PRO Module 3, Chapter 3.2.3, Unit 3: Valorisation of CH – The Concept of Appropriate Use**

**CG:** I can say that in one project we realised that one small hospital, which was highly specialised, with a high level of researchers and so on was kind of threatened with being moved to another part of Sweden. Of course, the county council and many others were not so happy with this. It wasn't just that it would put some people out of work, but it was also, you know, their level of education and skills. They would also have had to move with their partners; wives and husbands.

It was a difficult case. The hospital was built at the beginning of the 20th century so it had an obvious historic value. So, we were able to say, "We can help you, we can restore a couple of buildings." I think it was three or four buildings. We call them villas; the doctors' villas. We were able to restore them. That meant that you didn't have to pay for the maintenance of these buildings and it also meant that it would be more attractive for them to stay because they would have faced some costs if they had gone to the other place. So that meant that we gave priority to restoring all these villas.

However, the main purpose, or the main idea or objective, was to see if we could keep this activity in the region and keep these skilled people in the region. That was one way that we planned. It was not based on the historic value, it was not based on the craftsmanship anymore, it was not based on where in the region it was. It was simply based on the question: "how can we keep this hospital in the region?" That increasingly became the way that we planned consolation objects.

**DW:** So, regional economic impact.

**CG:** Yes, exactly.

**DW:** So, you developed the capabilities for the economic valorisation, for creating jobs and gross domestic income in-house, meaning in the team. You did not ask EY, PWC or Deloitte<sup>7</sup> for advice.

**CG:** I think that in the team we developed this. We talked about it. We also realized that we could be part of it and, also, that we were not afraid of it. Another thing was that in the team – **which was small; just three to five people – we had 100% trust in each other, meaning that we didn't compete. We also gave priority to a specific project, ahead of other things we were doing during the working week.**

For instance, if we had to select or choose one building over another, which was the next project, one of which had a national interest in terms of heritage while the other had almost a more or less local value, it was often more interesting for my partners in the Halland Model team to go for the local one instead of the national one.

**I had to accept that. And I did.** I didn't start to argue that we should take the other one because it had a higher historic value. Because I knew that I had to just think, "Okay, relax, the next one may not be the most interesting heritage building, but then we will go for it, so it'll be my turn someday." We just had to relax instead of fighting all the time and that was also important, I think. We were rather relaxed; we had trust so we thought, "Okay, I will spend as much time as I can on this heritage site, or on this conservation, even if it's just a dressing room or whatever. But when we come to a world heritage site all my colleagues will work in a serious way."

<sup>7</sup> EY: Ernst & Young, PwC: PriceWaterhouseCooper, Deloitte and KPMG are commonly called "the Big Four" as they are the largest accounting and professional consultancies in the world

One of the success factors for the valorisation of cultural heritage is the "completeness of capabilities" in the project team. All necessary capabilities for the cultural heritage site valorisation must be part of the interdisciplinary team. If even just one of the necessary competencies is missing it endangers the whole project. If the heritage becomes infrastructure for businesses the following competencies in the project team are crucial:



The ability to understand the competitive advantage of the region and/or the nation. This includes an understanding of the business clusters on-site.



The ability to know the business you are developing infrastructure for, e.g., to know the hotel business if you are developing a hotel.

These circumstances usually lead to interdisciplinary teams and the challenges accordingly!

**Give yourself time to think about the necessary competencies you need in your team/for the valorisation project and write it down in a table.**

**Try to get as much feedback on your thoughts from people you trust.**

**Make sure you gather the necessary competencies "around the table" in appropriate roles.**

**Whenever you get in touch with people or organisations that have relevant competencies, keep a record of their names, their contact details and which competencies they have. This file – this knowledge – will become a core resource for you as a heritage site manager!**

**Read more about it: HERITAGE-PRO Module 3, Chapter 3.2.4, Unit 4: Success Factors – The Right Players "Around the Table"**

**DW:** One final question, Christer, about the possibilities of **standardising processes**. Is it possible with standardised processes that our “learners” can now, twentyfive years later, do the same as you did because they have a detailed description of step-by-step processes? Following your explanations, it is very difficult to standardise valorisation processes and development processes concerning cultural heritage. The process very much depends on the situation on site. Do you agree with me?

**CG:** Yes, but I think that there are some general recommendations. The first regards having knowledge of what you are working with; what you are responsible for, which in my case was the historic buildings. So I could explain the historic building as the risk. Then, in that presentation, one of the important things was that I was able to present them in a way which meant that the surrounding society, or at least the potential partners, could understand and appreciate it. It was presented in such a way that it was kind of understanding how we could help them to solve their problems. It was not what I call supply-driven, simply saying that we have many fantastic buildings. Instead our interest was based on an exchange such as, **“What do you need?”**

“We need to create new jobs.”

“Okay, here I have 1000 buildings that are protected in my region, but I’ll give you forty of these because you can use these forty as a workplace.”

So that was one thing. Another thing was to **change the mindset from protection to what we called pro-action**. When you work as a conservation officer and just focus on protection, it means that you give the initiative to somebody else. You’re just waiting there for somebody to come and often your role is to say “no” to this. But here we said that if we were able to preserve

**Every place on earth and every time is unique!**

**Develop your situation and site-specific behaviour with courage and respect!**

**The models, methods and tools mentioned will help you!**

this building, we needed to find some resources that could help us with the maintenance or restoration. And that meant that we needed to find this opportunity, this money. And where could we find that? **We needed to find a new use or adaptive reuse.** So we focused on everything from the preservation to the adaptive reuse. I still think that is the weakest part of the chain: we have something developed which we call **smart specialization strategies** but we can clearly see that the heritage sector is not there and I think this is because we don't really understand this new situation. We cannot play an active part in it. We cannot present our values in a way that is understandable for those responsible for these strategies. And I say this more or less all the time. So, this is something that could be interesting for your students.

**DW:** Be prepared for adaptive reuse.

**CG:** Yes. And even more for the demand-driven way.

**DW:** Thanks a lot for your time and for sharing your knowledge and your experience with us.

### 3.4 GUIDELINES referring to Module 4 Participation

SITUATION/CHALLENGE
<p>The following is an example of a CH manager who has never dealt with participatory approaches before.</p> <p>S/ he wants to carry out a participatory process without encountering too many problems during the process itself:</p> <p><b>Why participation is important in cultural heritage</b></p> <p>"I have never worked with participatory models and approaches before, but recent discussions that are being brought up on social media and in papers coming from CH organisations all mention participation of</p>

GUIDELINES/RECOMMENDATIONS
<p><b>HERITAGE-PRO:</b> Yes, the role of participation and its different approaches has become more and more important in recent years, as a lot of projects in cultural heritage preservation <b>need the support of</b></p>

citizens, volunteers and further stakeholders as being one of the most important factors for a preservation project at a CH site (alongside the factor of having enough money for the project). I know that in certain projects the law requires participation to a certain degree, especially when it comes to regional planning procedures, approval procedures or environmental impact assessment. **But is it really necessary to do more than this formal participation?"**

**Why different people should be included and why you should do more than is legally required**

"My first problem is (1) to really understand **why it is important to include so many different people in a preservation project and why I should go far beyond what is required by the legally formal participation?"**

**local people as well as their knowledge of and engagement in** cultural heritage. They have numerous interests and it is important to gain the support of local people as they may be an important resource for CH-related projects.

You're right; formal participation is required by law and the degree of this heavily depends on the country and region you are from. Please get in touch with your local building or heritage authority in order to find out the legal requirements for your CH project. These guidelines will provide you with information on informal participation.

**All in all, going beyond the formal participation is highly recommended**, as this increases the acceptance of your project by the public. In order to find out about further advantages, see the following parts of the guidelines.

**HERITAGE-PRO:** The main objectives of conducting participation are to increase the acceptance of the CH project by taking the interests of (all) involved actors into consideration; to give people the opportunity to participate in cultural life, and to strengthen the identification with the CH itself. Instigating a participatory process that goes beyond the legal requirements leads to having a successful project that is supported by local people/governments/economy and facilitates your work in very different ways. In the short-term, it might be that you need to invest some time and money in conducting the participation. With regard to a long-term view, it is very likely that a participatory process will save you a lot of time and problems.

A useful tool to discover and find out about different stakeholders can be the so-called **design of personae** and **empathy mapping**. This tool can help you to see why your project could be of importance to various groups of stakeholders; where their possible interests

### Choosing between different forms of participation

**“Another factor I struggle with is finding out what kind of participation would be best for any or all projects in general. As there will be many different projects, I will need to take different forms of participatory approaches.”**

lie and why it is important to include their views in your project. These tools will be explained further in the following chapters on identifying stakeholders and their interests. This can be found **on page 20 ff. of HERITAGE-PRO Module 4.**

**HERITAGE-PRO:** There are different kinds of participatory approaches and degrees. It all depends on what you are aiming for by starting a participatory process. So, ask yourself: **What is my goal?** You can find different goals and the way to communicate them to the public on **page 11 (Table 2) of HERITAGE-PRO Module 4.** Table 3 on page 12 gives you an overview of the various actions you could take and who is going to make a decision at the end.

**In general, you need to decide between participation processes based on information, consultation or codetermination (see Unit 1/ Module 4). Your communication depends on the form of participation. However, one given form of participation doesn't exclude any other, and they can be carried out simultaneously.**

The degree of your participation process depends on the objectives of your project and participatory process. You and your team should think about why you want to implement a participatory process, what you intend to reach by doing it and what possibilities you have based on your limited resources like finances and time. You should always use the degree that is most useful for your purposes and take your decision based on advantages, disadvantages, requirements and obstacles of the various forms of participatory processes. **The different forms of participation and their characteristics are explained on pp. 27 ff. of HERITAGE-PRO Module 4. On pp. 33 ff. you can also find checklists for the preconditions of participation.**

### Communication and general soft skills needed in a participatory process

“How should I communicate differently depending on the form of participation? What soft skills, mindset and attitudes do I need as a cultural heritage manager?”

**HERITAGE-PRO:** The way you should be communicating with your target groups with regard to the different degrees on participation are described on pp. 28 ff. of HERITAGE-PRO Module 4.

Participation as **“information to the public”** is dominated by communication skills: **you should communicate and inform the public without giving them the right to make decisions (pp. 28 – 29).**

If you want to do **“consultation”**, your process and communication needs more preparation because **you want people to actively express their opinion and find a solution where all opinions are considered to a certain degree.** You have to prepare and implement the process in detail. For this, please check pages 29 – 31.

If you decide to use **“codetermination”** as form of participation, you need to prepare the communication and make clear rules for the process. As people and stakeholders will have the right to decide together with you, rules need to be elaborated and accepted. More information on this can be found on pp. 31 – 32.

E.g., a clear communication of non-negotiable requirements is a clear success factor of a process (p. 36).

Your general mindset, communication and soft skills should consider different factors. **In order to have a good attitude and the correct soft skills, please read the interview with Ms. Alberth on skills and attitudes of a cultural manager, on p. 36 ff.**











### Preparing participation and taking steps to avoid potential problems

“It seems very important that participatory processes are well planned so as to avoid problems during the process. How do I make sure that the process is well planned and that the chance of having any problems is small?”

Furthermore, you should refer to what is written in the guidelines in **Module 5 – Communication** as well as in **Module 2 – Conflict Management**. Both modules can help you in improving your communication.

**HERITAGE-PRO:** Yes, participatory processes always need to be prepared very well and you should consider some important key factors beforehand. **The most common obstacles are the following:**

-  Poor preparation of a participatory process
-  The subject of a participatory process not being clearly defined
-  Choice of an inadequate level of participation
-  Not being able to reach out to possible participants and stakeholders
-  Undefined handling of possible results
-  Missing information or incomprehensible mediation of this information
-  Disturbed cooperation (either from the beginning or during the process)
-  Not meeting the expectations created

**You can avoid these obstacles by considering answering some questions (both by yourself and with colleagues). You can find these questions in Module 4, pp. 12 – 14. You should consider these questions before starting the participatory process.**

Please also consider that introducing and using participatory approaches is not necessarily providing solutions for all kinds of problems. **Participatory approaches themselves have limits** that very much depend on the specific project, the people and stakeholders involved, as well as on legal standards,

### How to check the quality and efficiency of a participatory process

“How can I control whether the conditions for participatory processes are okay, and whether the quality of the process itself is of a sufficient standard?”

### How to identify those who should be involved in a participatory process

“The manager of a CH site has decided that s/he wants to carry out a participatory process. The challenge s/he is facing now is to clearly identify those who should be involved in the processes. S/he also wants people that at this point don't have too many interests in the CH site to become a bit more engaged. **S/he needs to decide: who should be involved and who should not be involved?**”

etc. In order to recognize the limits beforehand and avoid problems that could occur, **please see the questions for reflection on pp. 15 – 17 of HERITAGE-PRO training module 4 and answer them according to your project. They will help you to see the limits of participation for your specific project.**

Furthermore, Ms. Alberth identifies more barriers and problems in a concrete example in **her second interview question on p. 36**. Please read it.

**HERITAGE-PRO:** The simplest way to control the quality and the conditions is to use checklists, as they give you an overview over various factors. **You can find checklists for different target groups on pp. 33 - 35 in HERITAGE-PRO Module 4.**

In practical terms, you find more indicators that could measure the efficiency of your process. **Please read the final interview question in case study 2, which discusses the indicators that have been used by Ms. Patricia Alberth on p. 37.**

Ms. Alberth also identifies several success factors of her initiative in her **third interview question on p. 36**.

**HERITAGE-PRO: Everybody who is affected by a project should be involved in a participatory process.** Depending on the project, nature conservationists, administrations, tourism managers, trade unions and many others could regard themselves among those affected and emerge as actors in a process. **The circle of relevant actors can therefore be much larger than initially assumed.** It is not

always possible to fully inform all relevant actors from the beginning, and some actors may only be affected during the course of the process. **It is therefore important to design the participation processes as openly as possible.**

However, there are usually typical groups of participants that should always be involved in your participatory process:

-  The general public
-  Committed public
-  Critical public
-  Winners and losers
-  Media
-  Employees

**For each of these groups you can find a description of their characteristics on pp. 18 -19 of HERITAGE-PRO Training Module 4.**

### How to identify the interests of different stakeholders

“Another important challenge is to **identify the interests of the actors and stakeholders**. It is not sufficient just to know who should be involved. People organising a participatory process should be able to identify the various interests of the parties involved in the process. It is important to use a people-centred approach, considering them as individuals with special feelings, emotions, needs and interests. **How should s/he prepare specific reactions for possible stakeholders without yet knowing them?**”

**HERITAGE-PRO: There is a useful tool for instances in which you don't yet know the people you are going to involve in your participatory process: design a persona!** A persona is an archetype; a realistic portrait of a fictional individual. When designing personae, do not forget that people are at the centre of the whole process. The process helps to refer to similar people in more or less homogeneous groups in terms of behaviour, motivations, socio-demographic characteristics and cultural background. It is important to concentrate on relevant details that help us to understand them and not to forget that we care about people. Personae are fictional, but you should try to give them a name, a picture and identify which segment of the audience/stakeholders you want to represent. There are multiple templates that you can use (many of them are published under creative

### Case study: volunteers' and citizens' role and importance as a factor for cultural heritage preservation

#### Basic information on a case study

In 1999, one of the last inner city areas of Mainz with buildings from the 1950s was to be upgraded. In order to build a shopping arcade, the existing buildings were demolished, and a correspondingly large excavation pit was dug for the foundations.

At the end of 1999, at a depth of five metres, two archaeologically important finds were unexpectedly discovered: the remains of a sanctuary from the Roman Period and an underlying burial site from the Hallstatt Period that was around 700 years older.

**Initially a plan was made to remove the structural remains in accord with the archaeological documentation and to continue with the construction work for the shopping arcade.** A Mithraeum, which was discovered in the 1970s and also dates back to the 1st century, suffered a similar fate. It was irretrievably destroyed during the construction work – and insufficiently documented.

**Don't forget about citizens!**

commons license and you may use them directly or adapt them). **Table 6 on page 20 – 22 of HERITAGE-PRO Module 4 gives you a detailed description of how to do a design of personae.**

Once you have accomplished the design of personae, **you can complement it with an Empathy Map.** This Empathy Map could give you even deeper insights into possible stakeholders or citizens. It focuses on their emotions and perceptions. **Table 7 on page 22 – 23 shows you how to do empathy mapping.**

The situation described here shows that citizens will become active if they feel their interests in CH are not included or represented in CH projects, and also that once organised, they can have the power to influence such projects. Including volunteers in your CH projects can be very successful. The initiative mentioned has its foundations in volunteers working in cooperation with public authorities.

As it is clear that citizens can organise themselves to act if their interests are not considered in CH projects, **you can consider these interests in advance by conducting design of personae, empathy mapping and the introduction of a participatory process. See the information above and pp. 20 – 23 in HERITAGE-PRO Training Module 4.**

When volunteers themselves want to work at CH sites, or if you want to include them in working at your CH site, there are some factors you should consider:



The mindset of volunteers



Making contractual agreements

In 2001, resistance against these plans formed within the population of Mainz and a newly founded citizens' initiative, the Initiative Römisches Mainz e. V., collected within a short time some 10,000 signatures which called for the preservation of the sanctuary. This achieved the permanent conservation of the sanctuary and its inclusion in the newly built shopping arcade. Due to the planned construction of an underground car park at this location, however, the finds had to be translocated. The structural remains of the sanctuary were dismantled in a complex procedure and moved several metres. The resulting costs of 3.43 million euros were shared between the city of Mainz and the state of Rhineland-Palatinate. Since the festive opening on August 30, 2003 an estimated 25,000 visitors have come to Mainz city centre for the celebration. The sanctuary of Isis and Mater Magna can be visited in the *Taberna Archaeologica*, in the basement of the *Römerpassage*, Mainz.

#### What does the initiative do nowadays?

**The initiative is based on the voluntary work of its members and donations by visitors.** It cooperates closely with the city and other public actors like the General Directorate for Cultural Heritage, Rhineland-Palatinate. **The initiative aims to make the Roman city of Mainz more visible and perceptible.** It also aims to arouse interest and commitment in the history of the city and the region. **Furthermore, the initiative supports excavations, documentations, restorations, exhibitions and guided tours, as well as the production and printing of scientific publications and those for the general public through financial and personnel support. In particular, the task of the association is to preserve existing Roman testimonies and to initiate new excavations.** The initiative runs the *Taberna Archaeologica* which can be visited free of charge and also offers guided tours.



Identifying the roles for different volunteers



Creating an atmosphere of appreciation



Organising conflict management with volunteers

Please check pp. 24 – 25 of HERITAGE-PRO Module 4 for more detailed information on what you need to consider when working with volunteers!

**The initiative uses contracts working with its volunteers, and the different volunteers fulfil different roles. Please see page 24 of HERITAGE-PRO Module 4 concerning contractual agreements with volunteers.**

You can see that volunteers and citizens are able to contribute to giving the public access to cultural heritage. All they need is somebody from the cultural heritage sector who listens to them and gives them a bit of guidance. Conducting participatory processes allows you to keep their interests in mind.

### 3.5 GUIDELINES referring to Module 5 Effective Communication in an Interdisciplinary Environment

#### SITUATION/CHALLENGE

##### Module 5:

Effective Communication in an Interdisciplinary Environment

##### Case study:

Casa Batlló, Barcelona, Spain

<https://www.casabatllo.es/en/>



The work of Antoni Gaudí (1852–1926) was inscribed on the UNESCO World Heritage List in 1984. Initially, it consisted of three separate properties (Parque Güell, Palacio Güell, and Casa Milà), however, in 2005 this world heritage site was extended to seven properties through the addition of four others: Casa Vicens; Gaudí's work on the Nativity façade and Crypt of La Sagrada Família; Casa Batlló, and the Crypt in Colonia Güell. They are considered representative of modern architectural heritage.

Having different properties in terms of ownership – public, private, and semi-private – created a challenging atmosphere in terms of effective communication among various site managers with diverse backgrounds and viewpoints on the process of heritage preservation. These challenges and opportunities from a communications view-point have been discussed with Amilcar Vargas, Heritage Manager at Casa Batlló, and he explains how he and his colleagues identified the communication problems at the site, and also how they managed to overcome the challenges to some extent.

**Reza Sharifi:** Could you please tell us briefly about the heritage site you are managing and also the source of potential managerial challenges for your team to preserve such a unique property!

#### GUIDELINES/RECOMMENDATIONS



**Amilcar Vargas** is responsible for the World Heritage Site of Casa Batlló (Work of Antoni Gaudí) and is a PhD Candidate at the University of Barcelona. His main task is implementing the World Heritage Convention, raising awareness of the Outstanding Universal Value and achieving the potential opportunities of the inscription of Casa Batlló in the UNESCO World Heritage List. He is a specialist in World Heritage Management and has worked in renowned institutions such as UNESCO (Paris), the National Institute of Anthropology and History (INAH, Instituto Nacional de Antropología e Historia – Mexico City). His international experience includes academic stays in Canada, Germany and Mexico, conference presentations in thirteen countries, and several publications. He is a member of international professional associations like the International Council on Monuments and Sites (ICOMOS) and International Council of Museums (ICOM).

For effective communication in an interdisciplinary team, you should be familiar with the basic concepts as well as the terminology for each discipline. Here, in terms of UNESCO and the World Heritage List, the

**Amilcar Vargas:** Firstly, the works of Antoni Gaudí were inscribed in the UNESCO World Heritage List in 1984 as a “serial nomination”. In terms of management, 2005 was a turning point as the sites were extended from three individual properties to seven (including Casa Batlló, where I work). I can say it was a substantial extension. At that time, the official who prepared the nomination proposal wanted to add more sites. However, the International Council on Monument and Sites (ICOMOS) advised that it was more realistic to add those sites which have potential **outstanding universal value (OUV)** to this serial nomination.

**Reza Sharifi:** In dealing with a serial nomination, the sites that are unconnected in terms of geographical location automatically bring challenges to their heritage management and also to communication between the teams. So how do you deal with this?

**Amilcar Vargas:** That’s right; it’s challenging! Especially in a place like Barcelona with its strong sense of nationalistic ideas. The Heritage Department of the Catalan Government has created the Gaudí Council to raise awareness of the value of his work (<http://www.portalGaudi.cat/en/consell-gaudi/>). The council tries to bring together not only the site managers of the World Heritage Site (WHS) but also the managers of those buildings that are not included on the World Heritage List as a holistic approach. The council discusses several subjects, including those related to heritage conservation. The main aim of this council is to provide an opportunity for heritage managers to bring up and discuss common topics and challenges.

**OUV** (Outstanding Universal Value)<sup>8</sup> is the key heritage concept of the UNESCO 1972 Convention and is described in its guidelines<sup>9</sup>.

The main rule of communication is to clearly define the contribution of each partner to the preservation and valorisation of defined values of the site.

<sup>8</sup> [http://openarchive.icomos.org/435/1/Monuments\\_and\\_Sites\\_16\\_What\\_is\\_OUV.pdf](http://openarchive.icomos.org/435/1/Monuments_and_Sites_16_What_is_OUV.pdf)

<sup>9</sup> UNESCO and WHC (2012): Operational Guidelines for the Implementation of the World Heritage Convention. Available online at <https://whc.unesco.org/archive/opguide12-en.pdf>, checked on 15/7/2020.

When “feeling and emotion”, e.g., **sense of identity**, is involved in a conservation and valorisation process, the communication might become challenging and sensitive. An architect alone cannot achieve the goal of heritage preservation and valorisation; the team might need a social scientist or even anthropologist to cover all aspects of the intervention.

**HERITAGE-PRO** – Module 5, Units 1 and 5 offer technical suggestions if you are working in such an **interdisciplinary environment** and want to facilitate communication that helps you reach a decision. Some guidelines:



Accept that everybody in such an environment has his/her own perspective on the cultural heritage and his/her own “agenda” – transparent or hidden, based on a professional or an organisational background or personal interest.



Be sure you understand the viewpoint of others correctly and communicate clearly to avoid misunderstanding. Keep in mind that with **active listening**, you can form a coherent and knowledgeable response.



Asking questions and giving feedback is key, not only in order to assist in requesting more information, but also so that you can express

yourself. If you want to receive a simple yes or no answer, a **closed-ended** question is OK but if you want a comprehensive reply, raise **open-ended questions**.



Empathy, emotional awareness, or the way you or others express yourself is essential and can also be a source of information. **Empathy is one-part emotional awareness and at least two-parts body language translation.**



Decide how you want to express yourself in terms of language. If you are going to bring a sense of collaboration and solidarity, pronouns that refer to a group like “we” and “us” are more convincing. Alternatively – or contrarily – if you want to act alone and want to express yourself personally, “I” or “me” is more appropriate.



Do not forget; everyone likes to laugh even in an earnest conversation, so **use your sense of humour!**

A **collective approach** that brings all partners together in one place is a noble idea, but be careful that the characteristics of a heritage property also dictate the rule and task of each discipline and expertise.

Dealing with the site of a locally-valued place is different from a World Heritage Site. In the former, the role of communication with locals as the leading custodians of the site is more important. In the latter, you will have to consider the associated UNESCO values that have already been identified, namely the **Outstanding Universal Value** and also a site's integrity. Therefore, in all these different situations, you may need a different approach in terms of relation, creating links, and communication.



**Reza Sharifi:** What exactly does this council do? Furthermore, how do you prioritise your conservation and preservation activities?

**Amilcar Vargas:** Ideally, the council works on education, research and conservation, but as they have a tiny budget, they have to prioritise these activities. We have an annual meeting for **networking**, sharing the best practices on the conservation associated with specific topics, which is more or less networking among ten to twelve heritage managers. I have to say that for the council, the promotion of Antoni Gaudí, advocacy and awareness-raising are essential. A part of our activities is celebrating the anniversary of the birth of Antoni Gaudí. In terms of citizen involvement, I am working at a site that is managed by its community. I'm sure you can imagine how the owner of the property (like Casa Batlló) is a key and fundamental part of decision making. To me, such citizen involvement is at the highest level of citizen participation, or **empowerment level**, so to say. Here, the local community is the primary decision-maker, and they decide the kind of intervention based on the architects and heritage institutions' criteria. As I have mentioned, some of the buildings are private property, e.g., Casa Batlló, which has been private since the time it was built.

However, the Catalan heritage department has to implement the Catalan Law on Cultural Heritage (1993). According to this Law, the Catalan government must supervise the conservation and intervention of Cultural Assets of National Interest. Under Catalan Law, there is also another heritage protection level for local interest sites, decided by the city council. For example, in Barcelona, the city council also monitors heritage aspects. In the case of cultural properties of national interest, it has to be approved by the Catalan government.

**Advocacy and awareness-raising** should be one of the priorities of your heritage preservation list. The objectives could be, for example, linking preservation activities with storytelling, community building and sustainable action.

**HERITAGE-PRO** – Module 5, Unit 5 gives you primary objectives for such a process with two practical examples. It shows how you can achieve your aim. There are five critical components of advocacy that can guide you towards a better plan:



Build partnership and use all opportunities to **network**, especially when you find other experts that are dealing with the same cultural and historical background buildings or similar properties in terms of architecture and style.



Connect local communities to their local traditions. Civic participation and delegated power are considered a high degree of “citizen control”, according to Sherry Arnstein’s “Ladder of Citizen Participation” , which gives a clearer understanding of the extent of citizen involvement in project planning. Your role is not just to inform the citizens but also involve the citizen in the process of **decision making**, and this message must be clear from the initial period of any heritage conservation projects.



**Systematic documentation** of your properties should be part of preservation activities. This consists of recording, documenting, and informing management of the conservation of heritage places.



Introducing the preservation activity into the informal **education system** is also vital. This can be through public lectures, webpages, publications or by encouraging masters and doctoral students to research and write their theses on conservation topics.

The **conservation interventions** in Gaudí buildings are very much from a heritage-centric point of understanding, mainly through institutions dealing with monuments that are part of Catalan heritage. To explain this, I would say that Catalan people and institutions are dealing with Catalan heritage, and also that the conservators are mainly local. Notwithstanding, you find international people coming from other Spanish regions and even from other countries.

As the buildings were built with 19th and early 20th Century techniques, the same conservators are working on all buildings of this kind, simply because they deal with similar problems and issues. As the Catalan region is not that big, it's mainly local restorers and architects that are working on the properties. I assume that it's challenging for people from other regions of Spain to come to Catalonia and work in the field of heritage conservation. One of the things is the language barrier, and for some positions, especially in public institutions, it is mandatory to have a certificate of Catalan language.

The Catalan government, as a principal institution for safeguarding the monuments with the national level of protection (Cultural properties of National Interest), mainly communicate in the Catalan language (e.g., requests, surveys and documents). However, they also speak Spanish. The creation of the Inventory of Catalan Cultural Heritage is ensured by "Catalan Law on Cultural Heritage" (1993)<sup>10</sup>.

In terms of **education**, the council focuses on the exchange of expertise; the role of the council is more about providing a place for gathering with other people and networking. At the Gaudí annual seminar, some of the managers talked about technical aspects, while

<sup>10</sup> Law 9/1993, of 30 September, on Catalan cultural heritage (DOGC no. 1807). Available online at <https://cultura.gencat.cat/en/temes/museus/recursos/normativa/>, checked on 8/09/2020



**Using the knowledge of experts** in the different field should always be welcome!

Nowadays, the role of social media in advocacy and awareness-raising is vital. A relatively simple way of joining ongoing campaigns is by using their hashtags in your social media posts. However, before embarking on endless social media campaigns, it is suggested to:



check social media profiles of reference actors in the field of cultural heritage. In what campaigns are they active?



learn more about these campaigns – rationale, duration, promoter, goals, etc.



ask – can you (really) contribute to any of these campaigns?

If you decide to join a campaign, define the message(s) you want to convey and connect them to your campaign.

at the last meeting, which I attended last February, we discussed our strategic plan for the next five years. In the previous seminar, we had some **experts**, and we discussed the use of light in Gaudí buildings, as well as monitoring, and so on. It is not a public event; only some specific people can join. Sometimes the organisers bring in experts from other parts of Spain or abroad to give lectures on a particular theme.

**Reza Sharifi:** How do you manage the communication of your activities as part of the strategy for the Casa Batlló and in general?








**Amilcar Vargas:** Concerning the first part of your question, this year, we wanted to celebrate the 15th anniversary of the extension of the WHS, but because of the COVID-19 pandemic we decided to limit our activities and to go mainly online. For example, we did typical **tweets, Instagram, and LinkedIn posts**. However, we received very positive feedback, and it has encouraged the other site managers to join us in future campaigns. Among these, I would like to mention the mapping of the Casa Batlló, which was shared with local citizens and got positive attention (<https://www.casabatllo.es/en/mapping-awakening/>).

Concerning the second part of your question, in general, the policy and planning in communication should be in line with the objectives stated in the mentioned law. Moreover, the Catalan heritage department – as the main body to implement the law, besides technical intervention – is designing such a strategy as well as the policy. However, on a smaller scale, in Casa Batlló, we have our own communication strategy.

Of the seven properties, four of them are private buildings including Casa Batlló, the Nativity Façade and the Crypt of La Sagrada Família, Casa Mila and Casa Vicens. The rest (Parque Güell; Palacio Güell;

It is always challenging in an interdisciplinary team to motivate everyone to work towards a common objective. Here, it is paramount to convey your message of heritage value and preservation. It is recommended that you include communication planning and implementation in the overall strategy of conservation, **to link milestones with communication activities**. Keep in mind Benjamin Franklin's quote, "If you fail to plan, you are planning to fail." Communication is no exception here.

**HERITAGE-PRO** – Module 5, Unit 5, helps you to build your communication plan. Before making any **communication plan**, answer the questions below in order to be clear about it:

-  What message(s) do I want to communicate?
-  Who is the audience?
-  Who might be my communication partners?
-  What is the best way to communicate with the audiences (experts as well as non-experts)?
-  What budget do I have?
-  Do I have to consider specific dates/events/initiatives, not only in the ongoing preservation, but also on a local/regional/national/European level?
-  What measurements will I use to know if I have been successful?

A communication plan is a direct route in delivering your communication strategy, consisting of nine well-defined elements:

Gaudí's work on the Crypt in Colonia Güell) are public buildings. In terms of conservation, there are not many differences between public and private sites; all of them have been very well preserved, both public and private. In public buildings, the government – because of its position – has given special attention to restoration and maintenance. As for the private properties, we need to attract more visitors, so we need to invest as much as we can. However, I should admit that such restoration makes it costly for the locals to visit private sites!

We rely on our main source of income, i.e., tourism; therefore, there are no such public funds available for us. At the same time, we have another two sites that are run by NGOs, while a foundation manages the Catholic church, which is the owner of the Sagrada Família. The same goes for Casa Milà.

**Reza Sharifi:** As a heritage site manager, how have you managed to raise awareness of the heritage value?

**Amilcar Vargas:** First, we should understand that not all works of Gaudí are part of World Heritage Sites. Here, we see that it is a challenge for the Gaudí Council to provide **a shared cultural narrative** among the WHS sites and those which are not included in the nomination file. As all those buildings contain heritage of significant value and need to be preserved, the council would like to connect them to provide vital support in terms of preservation.

Secondly, the council was created by a governmental decision with an official declaration behind it. Such confirmation provided an excellent platform for the council to prophesy a familiar story or narrative for all sites.

In terms of this Site – Casa Batlló – narrative and storytelling are different. It is more about architectural

- vision and mission statement
- SWOT analysis
- communication objectives
- target groups and audiences
- communication strategies and actions
- implementing the plan
- evaluating and controlling the plan
- fostering interdisciplinary communication
- measuring success

Finding the shared narrative of a site or several sites means going back to the value assessment of a heritage site and mainly answering why they are important, and to whom. Nevertheless, there is a powerful way to recall the importance of the site and make it very easy to remember while engaging with audiences: **storytelling**.

**HERITAGE-PRO** – Module 5, Unit 4, shows how to develop your story and what storytelling looks like.

In this area, the target groups could be visitors, locals, citizens or even funders and decision-makers. It is a popular method of engaging with people's emotions and for them to experience historical objects or items, especially when combined with advancing and digital technologies. Such communication can benefit from a combination of visual or audio effects, and from reaching diverse audiences. Social media is a great tool for this. The goal is to turn history into an engaging story!

aspects and the day to day life, i.e., what it was like to live at that time. Being on the list of national interest, the cultural property does not mean that you have to include or make nationalism mandatory at first.

Please do not limit yourself — use your imagination; it has no boundaries. Such a story could be from your personal experience or one from a visitor who is visiting his or her dream properties for the first time. The hero or heroine could be a conservator who tries to reveal an old figure on a stone. Or an anthropologist who tries to understand the social relations of an ancient community. The storytelling model developed by Kisić and Tomka (2018)<sup>11</sup>, which is tailored to heritage practitioners, can help you across different stages:



Construct your call for action or advocacy as a story.



Start with a hero or heroine. It could be based at a heritage site, on a particular memory, or on a group whose memory is lost or whose heritage is under threat.



Define the villain. Key agents behind the problem are adversaries. Is it some questionable development, inadequate protection regulation or mistreatment by citizens? Describe the villain in such a way that there is a reasonable imbalance of force, but so that a positive outcome can be imagined.



The goal of the story also has to be clear and attainable. What is it that happens if the information has a happy ending? Community pride? Justice for a person or a group? A new public space? New regulation, or improved equipment for conservation? Whatever it is, it has to capture the public's or decision-makers' imagination.



Choose auxiliaries well: those could be citizens, funders, decision-makers. What is it that makes a good helper or a friend? Courage? Determination? Sensibility? Kindness? Empathy? Forward-thinking?

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<sup>11</sup> Kisić, V., Tomka, G. (2018). Awareness raising and advocacy. Learning kit for heritage civil society organisations. p.28. The Hague: Europa Nostra.

**Reza Sharifi:** What do you think: what else can the site managers of Gaudí buildings do?




**Amilcar Vargas:** I think one of the necessary things is to develop the Gaudí Council webpage. The website is a platform with information about all the Gaudí properties; however, the text of this webpage needs to be improved; each page is very different in terms of writing style, and more consistency is required. This webpage can include other properties; we can emphasise the uniting fact that a single genius has designed all the buildings. It can be a way to connect Casa Batlló to other facilities. We are also working on our webpage to explain parts of other Gaudí buildings and their relationship with this house. There are some elements that Antoni Gaudí applied and implemented in other buildings after finishing Casa Batlló, while other techniques used in this house come from other previous dwellings.

**Reza Sharifi:** What do you think is the role of **digitalisation** within domain of heritage management?




**Amilcar Vargas:** We especially use social media as our primary way of communication and to reach our audiences. As I mentioned we use Twitter, Facebook, LinkedIn and Instagram to get our messages to our different target groups. For us at Casa Batlló, digitalisation is a fundamental part of how we engage with visitors and raise awareness of the outstanding universal values of this property. It is the reason why we have put so much effort into having digital platforms for

**HERITAGE-PRO** – Module 5, Unit 2 gives some straightforward guidance on writing. At the first step, break down your idea into smaller phases, divided here into three main stages.


Preparation for writing:

-  Be clear about the message you want to convey and who will read it.
-  Identify what is unique about the cultural heritage site or expression.
-  Prepare an outline or mind-map.

During writing:

-  Avoid overwhelming the reader with data and figures.
-  Related to the above, avoid jargon and overly technical terminology.
-  To surprise the reader, make innovative, unexpected connections between your ideas.

After writing:

-  Go back to your original notes: Are you missing something important? If you changed your original argumentative structure or focus, is it for a good reason?

No one can underestimate the role of social media within a communication strategy. It needs to be suitable for your message as well as for your general communication and marketing strategies.

**HERITAGE-PRO** – Module 5, Unit 2 intensively covers this topic.

As a primary step, you need to **define your social media tools**, e.g. Facebook, Twitter and so on. Choosing the type of social media has a direct link to your message, your audiences and also communication

all our users and visitors, which are available in eleven languages.

**Reza Sharifi:** What do you recommend to someone who wishes to enter communication in an interdisciplinary environment?

**Amilcar Vargas:** As heritage management is an interdisciplinary subject, we can sometimes misunderstand each other; therefore, we should be aware of that; we should be **sensitive communicators** and listen with special care. We should look at the topic from a different perspective. In Casa Batlló, we are a very interdisciplinary 21st-century team. Antoni Gaudí did more or less the same, he gathered people from various disciplines, and thanks to his creative geniality, created a work of art.

partners. You should identify which way is the most suitable to reach your audiences. This can also depend on your allocated budget. You do not need to use all these platforms, particularly when you have limited resources. An efficient way to reach a high number of audiences is by **launching specific campaigns**.

Of course, you can use whatever platforms you like but be aware of the **legal aspects of social media**. This depends mainly on which country you live in. Secondly, keep in mind that when you are on the Internet there are always some people looking out for your mistakes in order to benefit from them.

Whether we work at a cultural heritage site or as an individual cultural heritage professional, we need to work as a team consisting of different people from different professional backgrounds.

**HERITAGE-PRO** Module 5 provides a lot of methods and tools, enabling effective communication. It takes into account that communication is sensitive – internally and externally, for the preservation and for the valorisation of cultural heritage. Check the module in detail for further inspiration and guidance.



# THE HERITAGE-PRO PARTNERS: AN INTERDISCIPLINARY TEAM FOR SKILLS DEVELOPMENT IN CULTURAL HERITAGE PRESERVATION

**HERITAGE-PRO** is an Erasmus+ initiative of six European partners from five countries who strive to answer to the continuing call for interdisciplinary training for professionals of different disciplines towards sustainable management and preservation of cultural heritage.

The **HERITAGE-PRO** website <https://heritage-pro.eu/> provides you with further information and updates. Please feel free to browse through the pages and benefit from information and training material alike.

**HERITAGE-PRO** is implemented by a partnership of six European institutions, companies and networks from Germany, Spain, Austria, Sweden and Belgium, all of which are active in vocational training for the preservation of cultural heritage. These institutions have cooperatively developed this vocational training scheme, which closes the gap of interdisciplinary training in the field.

- **Kultur und Arbeit e.V. – Bad Mergentheim / Germany (Coordinator)**  
[www.kultur-und-arbeit.de](http://www.kultur-und-arbeit.de)
- **Restrade – Höganäs – Sweden**  
[www.restrade.se](http://www.restrade.se)
- **Asociación Española de Gestores de Patrimonio Cultural (AEGPC) – Madrid / Spain**  
[www.aegpc.org](http://www.aegpc.org)
- **European Network on Cultural Management and Policy (ENCATC) – Brussels / Belgium**  
[www.encatc.org](http://www.encatc.org)
- **Institut für immobilienwirtschaftliche Forschung (IPRE) – Vienna / Austria**  
[www.ipre.at](http://www.ipre.at)
- **Entwicklungsagentur Rheinland-Pfalz – Mainz / Germany**  
<https://ea-rlp.de/>





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More information on their work, achievements, and ambitions can be found [here](#).

## Germany

- Mrs **Patricia Alberth**, head of the World Heritage Office of the City of Bamberg
- Mr **Thomas Metz**, director of the General Directorate for Cultural Heritage of Rhineland-Palatinate
- Mr **Frank Sprenger**, head of the Centre for Conservation and Monument Conservation of the Koblenz Chamber of Crafts
- Mr **Titus Kockel**, PhD, head of Unit Promotion of the Trades, German Confederation of Skilled Crafts and Small Businesses

## France

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## Spain

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- Mr **Gabriel Morate Martin**, director of the Spanish Historic Heritage Preservation Program at MonteMadrid Foundation, member of the Executive Board of Hispania Nostra and the Spanish Association of the Friends of the Castles (Head of the Technical Department), editor of the “Monumentos Restaurados” (Restored Monuments) publication series

## Norway

- Dr. Mr **Terje M. Nypan**, technical director at Riksantikvaren (Norwegian Directorate for Cultural Heritage)

