Manual of Management Planning

for Antiquities and Tourism Sites in Jordan

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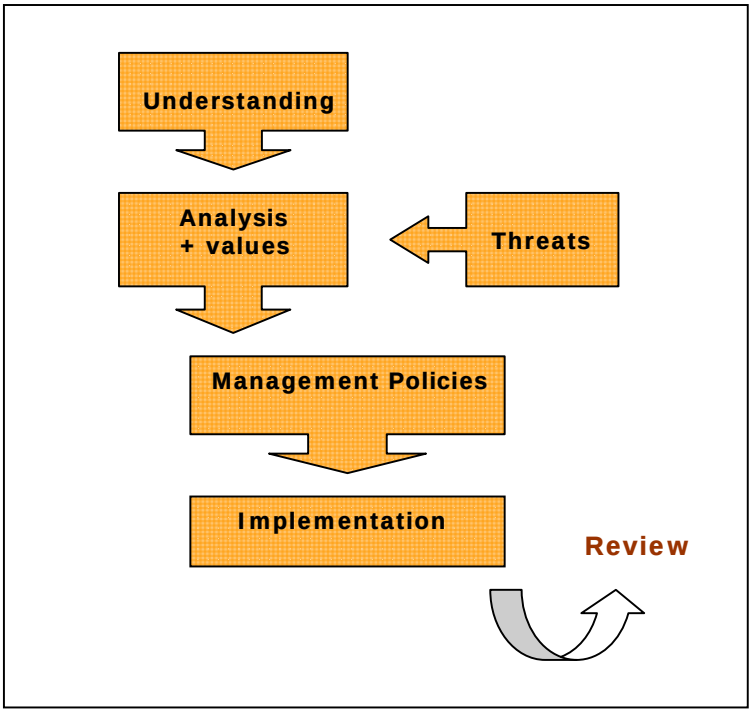
Management planning as a process

The process of preparing a management plan is as important as the completed plan. This enables the multi-disciplinary team to work together, benefit from each others experiences and negotiate conflicting issues or demands. A sufficiently long interactive consultation period will allows decisions to be evaluated, responsibilities for implementation to be established and most significantly enables the management plan to become established with the community of people who will be responsible for its implementation. Some of the major decisions taken during the planning process can begin to be implemented or acted on before the final version of the approved plan is published.

The following diagram summarises the process of preparing a management plan.



The process of preparation and activation of a management plan can be seen as three components:

1. Gathering and analysing the evidence
2. Consultation through which agreement is reached
3. Implementation and review

None of the stages are mutually exclusive and can be, in full or in part, repeated as site conditions change or new information becomes available. A review and re-evaluation is recommended as part of the process at each stage. Furthermore consensus on the plan is best achieved in the process of preparing it, and the plan will continue to be developed through ongoing review.

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Time frame

The process of preparing a management plan is directly linked to the various sections of the management plan. Depending on the size and complexity of a site, the preparation of a management plan will take between 6 months and a year. This timeframe is unlikely to occupy the facilitator on a full time basis, but is often the time period that is needed to allow for consultation, reaching consensus and agreeing the plan with the various partners and stakeholders and assuring their commitment to action points.

Table: Typical time frame for the completion of a management plan

Task/Time frame*												
Agree scope and boundaries												
Gather data												
Consultation												
Establish significance & values												
identify threats, vulnerabilities												
Vision for the site, objectives												
Management policies												
Action plan												
Projects												
Operational management plan												

*time frame relates to 4-5 months to 9 months depending on the size and complexity of a site.

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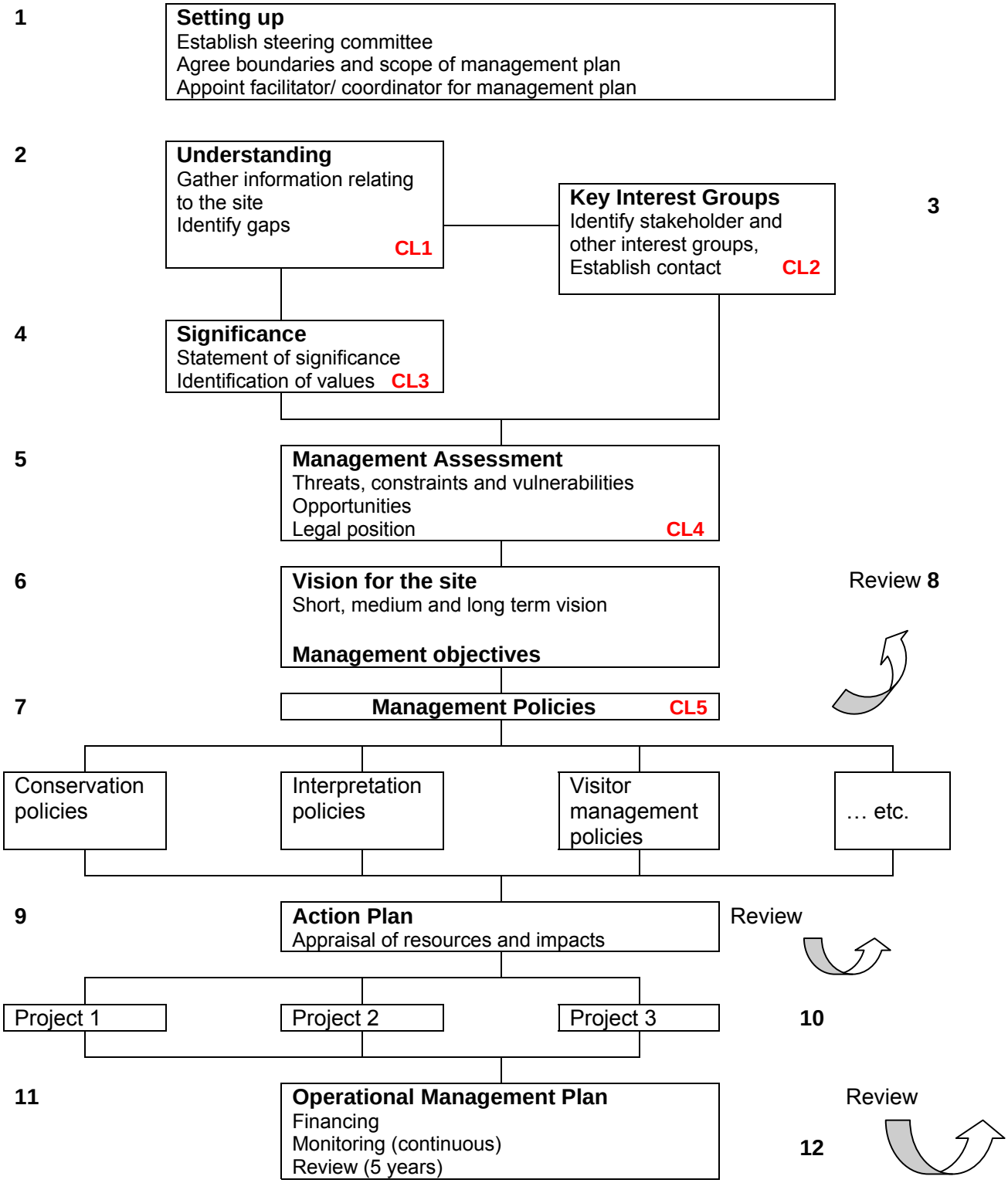
Framework



CL refers to checklist

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1. Scope of the Management Plan

Alongside designated site boundaries for the antiquities site, a management plan may need to consider areas that are linked to the site or which impact on the site and the associated tourist operation. In some instances the tourist interest may include a number of sites that are not necessarily within the same boundaries. In such cases the management plan should consider the areas that link these sites, where there are implications for the location of tourism infrastructure and services for example. Even if it will not be possible to have jurisdiction over these areas recommendations can be made to the relevant authorities governing them.

At the start of the plan, the scope of the plan and the geographic remit will be established. This may include a designation of core areas and a buffer zone of affected areas. In such cases policies will be developed for the core areas and recommendations can be made for the others.

The Heart of Neolithic Orkney WHS, UK

The Heart of Neolithic Orkney WHS designation covers specific sites distributed around the Orkney islands. The management plan makes policies for the specific sites that are managed by Historic Scotland, a government agency; while more general recommendations are made for the management of the landscape that surrounds and unites the specific sites.

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Checklist 3: Site values

Historical value	Role the site has played in history. Historic information that is evident in the remaining fabric
Archaeological value	Current and potential values Contribution of the site to archaeology in the region and understanding of certain periods of history
Research value	Potential of the site to inform current and future research
Cultural value	Impacts and influences of the site on ongoing cultural practices
Intangible value	Values of association, links to important events in history or to personalities.
Aesthetic value	Appreciation of the qualities of beauty, proportions, harmony of buildings or artworks at the site Quality of craftsmanship Inspiration of the site for contemporary arts and craft practices
Rarity value	Unique surviving example of type or period. Unique example of its type in the region
Identity value	Links to national, regional or ethnic identity
Landscape value	Setting of the site and place of the site in greater landscape setting, including urban landscapes
Tourism value	Attractiveness of site to tourism and in attracting tourists and tourism development to the locality and region
Economic value	Value of the site for tourism in the locality, region or nationally. Direct and knock-on economic benefit of site to individuals and in attracting inward investment
Educational value	Influence of site on education (part of curriculum) Use of the site for educational visits
Religious value	Relevance of site to current religious practices Historic role site of site in the emergence and spread of a religion
Spiritual value	Spirituality of the place including references to historic religious or ritual uses
Symbolic value	Recognition of the site as a symbol of local or national identity
Social value	Current day social uses and meanings of the site, including recreational use or appreciation as beauty spot Links local communities have to a site
Political value	Use of the site for high level visits, including state visitors or to make political statements.

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7 Management policies

Overview

Once the values have been identified, and threats and opportunities defined, policies for the management of the site to counter the vulnerabilities and to enhance the character and ensure the sustainable use of the site can be formulated and agreed. Policies will form the basis of the action plan and should be focused on the conservation and enhancement of the site's values. Policies will cover a period of about five years as it is unrealistic for any organisation to define firm policies with realistic outcomes for any longer period than this, since organisational objectives change as do external conditions.

While policies will cover the site areas as defined by the management plan, the management plan can also make recommendations for activities outside the site which might impact on it. These could include the development of appropriate policies for land use and development control, or tourism strategies for a whole area. It is therefore important that all stakeholders are involved in the development of the vision, objectives and policies for the site.

The following table lists policies that are likely to be formulated for archaeological sites, and specific issues that might need to be addressed. Policy areas will differ according to the needs of the site and objectives of the specific management plan. Although it appears as a long list:

- Not all policy areas will be needed for every site
- A considerable amount of the information may already be in place and procedures already underway. These can be built on or their appropriateness evaluated.
- Some sites may have policies that are very specific to a certain situation or partnership arrangement.

Each policy must clearly relate to the **management objectives** that are set for the site. All the policies set out in the management plan have to be actionable, with a clear indication of responsibilities for implementation, operational procedures and sources of finance.

Hint: Within each policy grouping no more than 10-12 points should be necessary as policy statements.

In the following sections each policy area is explained in more detail, identifying the key players and potential partners. A list of questions is provided as a guide on the type of policy statements that might be made. The questions are indicative only and not all will be applicable to all sites. There is also likely to be issues specific to a site that is not covered by the list of questions. Some example policies can be seen in the action plan in Appendix A.

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Checklist 5: Management policy areas

Policy Areas	Focus
1. Landscape and setting	Contribution of the site to a landscape or its role in a recognized landscape The role and importance of the surrounding landscape in defining, enhancing or contributing to the understanding of the site
2. Land use and planning (local and regional)	National infrastructure grids Buffer zones Local planning policies Local masterplans and development plans Building regulations
3. Site planning	Adaptive reuse Master plan for the site Design guidelines Location of services Setting of buildings, shelters and hardened surfaces and their impact on landscape, setting of the site and below ground archaeology
4. Protection	Vulnerability of site Protection of site boundaries Mitigating impacts of site use on archaeological remains and setting of sites Need for shelters
5. Archaeology: Excavation and Research	Methodologies for excavation Balancing archaeology with conservation and visitor management Approaches to multi-layered sites Research activities and publications Implications for interpretation
6. Conservation	Overall site conservation policy Conservation of different types of materials Conflicts of excavation and conservation Maintaining authenticity and integrity of the site Re-construction and replicas
7. Maintenance	Regular maintenance needs of the site Staffing Landscape maintenance Maintenance procedures for the site
8. Interpretation	Narrative and site presentation (what story?) Interpretation on site recognising limitations of physical evidence and fragility of sites Interpretation off site and use of other media

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7.3 Site planning

Considerations	Adaptive reuse policies that will enhance the values of the site and not be a threat to them Design guidelines Location of services on the site (water, drainage, cabling, lighting etc.) Master plan for the site Setting of buildings, shelters and hardened surfaces and their impact on landscape, setting of the site and below ground archaeology
Responsibility for implementation	DoA (unless sites are specifically owned and managed by others, such as a church authority)
Key partners	DoA
Other partners	MoTA MMA Service providers (Water, Electricity)
Links to other policy areas	Visitor Management, Interpretation, Maintenance
Additional outputs	Site Masterplan, Design guidelines

Some questions to consider:

- → Is there a masterplan for the core site area and if not is one needed?
- → Are their areas on the site designated as low impact areas where new buildings or site services might be placed?
- → Is there an overall strategy for the lighting of the site, including the location of light fittings?
- → Are their design guidelines for any buildings on or immediately surrounding the site that consider height, volume, massing, choice of materials and architectural character?
- → Are there guidelines for areas of the site through which infrastructure for site services can be directed where impacts on archaeological material will be negligible?
- → Are their design guidelines for shelters on the site that consider the impact on below ground archaeological remains, the architectural character and its impact on the site setting and the impact of any internal microclimatic conditions on archaeological remains?
- → Are there design guidelines for hardened surfaces, paths and other surface areas on the site?
- → Are there buildings or structures on the site that are no longer relevant and/or detract from the values of the site?
- → For any new buildings and services proposed for the site are sufficient funds available to adequately maintain them?
- → Are there clear guidelines and procedures in place for event taking place at the site, including those organised by third parties?

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Best practice

Uluru-Kata Tjnta World Heritage Site, Australia

The design of the visitor centre and associated visitor facilities within the national park make use of local materials and building techniques to effectively fit in with the significant landscape of the national park.

Uluru (Ayers Rock) is in the background.

Hrad Devin , Slovakia

The design of shelters over archaeological remains needs to be in keeping with the character of the site and respect key vistas and the setting.

Other considerations include designs that provide ample interior conditions for the preservation and safeguarding of the archaeological material while providing safe access for visitors.

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7.5 Archaeology: excavation and research

Considerations	Methodologies for excavation, sequencing and sampling Balancing archaeology with conservation and visitor interpretation Approaches to multi-layered sites reconciling excavation with interpretation Proposed research activities and publications Implications for interpretation
Responsibility for implementation	DoA **Archaeological surveys & excavations department**
Key partners	Universities International excavation teams **DoA Research & Publications department**
Other partners	Friends of Archaeology
Links to other policy areas	Interpretation, Conservation, Visitor Management, Site Planning
Additional outputs	

Some questions to consider:

- → Is there a planned excavation programme for the site?
- → Are there planned excavation strategies and policies established for the site?
- → Is there an established site set up for excavations, including accommodation and work areas for the teams working on site?
- → Where are spoil heaps being located and do they impact on other aspects of the site?
- → Will certain areas of the site be closed to the public and will visitor routes need to be altered during excavation periods?
- → How will excavated areas be treated on completion (eg backfilling or consolidation of remains)?
- → Will there be public access to the excavation process?
- → Where will the results of excavations be published, including web sites, and how accessible will this information be?
- → Is there a database for finds and how is this managed?
- → How will the excavations feed into current and future interpretation and presentation of the site?
- → Is there an assessment of the impact of parking or other visitor facilities on known and potential archaeological material?
- → Where will the finds from the excavation be stored and will this have an impact on the site layout?

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7.13 Training

Considerations	Training needs of site based staff Training of guides Capacity building programmes The use of the site for training purposes
Responsibility for implementation	DoA + MoTA
Key partners	
Other partners	NGOs, training partners
Links to other policy areas	
Additional outputs	Training plan

Some questions to consider:

- → What are the training needs of site based staff?
- → Is there an established training programme for staff?
- → Does the site have the potential or capacity to be used for training purposes?
- → Are there opportunities to train locals as guides?
- → Do staff have access to regular continuing professional development opportunities?

Best practice

Volubilis, Morocco

An informed and enthusiastic guide provides a memorable visitor experience. Local knowledge will provide added value. Locals directly involved in a site and benefiting economically from tourism are the best guardians of a site.

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12 Evaluation, Monitoring and Review

A management plan should be continuously monitored, reviewed and updated with significant reviews backed by consultation to be programmed ideally for five year intervals. Reviews may also be required at times of significant change (e.g. changes of ownership), in response to a new threat or when a major project has been completed and its impacts will be felt on the site.

The progress of the plan should be reviewed at least annually by the Steering Committee. The adoption of a management plan means that the action points determined will be acted upon within the time frame set out in the plan. An annual review also provides the opportunity for developing the work programme for the next year.

The performance of the management plan can also be measured against set indicators. Some examples are given in the table below.

Policy/ issue	Measured by
The conservation of standing structures	a regular condition survey
The state of archaeological deposits	level of erosion
The state of the natural environment	number of species present
Visitor usage and enjoyment	visitor numbers and surveys
Economic contribution	income figures

A more formal five year periodic review will be an opportunity to revise the vision, management objectives and identify a new set of policies and action plan. The review should form the basis for a new edition of the plan with new policies for the succeeding plan period. The management policies in the plan should include the review process clearly identifying those who will be responsible. The participatory processes of preparing, implementing, monitoring and re-evaluating the plan, will be important for the long-term management of the site.

Any documents produced as a result of a recommendation in the management plan, such as a conservation plan or an interpretive plan will have to be approved by the Steering Committee as an addendum to the management plan.

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