
MANAGEMENT OF MONUMENTS OF HISTORY

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ABSTRACT: The system of protection of historical monuments in Poland, including Monuments of History, is not fully adapted to the political changes after 1989. An underestimated, important element of this system determining effective protection is professional architectural heritage management combining conservation with contemporary use of historical buildings. Interdependencies between conservation and non-conservation conditions force us to perceive the protection of monuments as a complex and interdisciplinary process – mutually correlated interactions on the historic object, in which conservation measures are the key, but not the only, activity. The organizational entirety of these activities is management. Monuments of History as the most valuable heritage should be a model of management of the national, historical resources. Fifteen years of experience of the Srebrna Góra (Silver Mountain) Fortress monument allow us to bring closer the objectives and complex conditions of related management activities as well as applications addressed to national authorities responsible for the protection of cultural heritage.

KEY WORDS: Management, Monuments of History, Srebrna Góra

Introduction

Theory and practice of protection and conservation of monuments has a rich methodological and technological body of experience. The system of protection of monuments functioning in Poland today means that in many cases these resources are not used.

As a result of political changes after 1989, the protection of monuments ceased to be an autonomous activity of conservation specialists financed by the state. Restitution of ownership rights, responsibility of owners of historic buildings for the maintenance of their value, the share of monuments in the real estate market and, above all, the contemporary use which conditions their protection, means that the effectiveness of actions guaranteeing the preservation of architectural heritage to be determined not only by specialist conservation knowledge, but also by many factors outside the area of conservation and restoration - legal, economic and social ones. The protection of monuments is integrally connected with their use. It requires modernization and adaptation to modern functions and meeting current technical and operational requirements, thermal

standards, necessary equipment and installations, fire protection systems, evacuation systems and others. This significantly expands the scale of conditions, including the scope of necessary documentation and industry permits and agreements. The scope and pace of conservation and adaptation work are determined by the financial resources of the owner of the monument and the possibility of obtaining subsidies from state budgets, local governments and EU programs.

The interdependence of conservation and non-maintenance conditions forces us to perceive the protection of historic monuments as a complex and interdisciplinary process - correlated interactions with each other on the historic building in which conservation measures are the key, but not the only, activity.

If the intended purpose of these interactions is the preservation of a monument associated with its development and often its commercial use, then the organizational sum of these interactions can be described as the management of a historic object¹. These activities include: planning (selecting objectives and ways of achieving them and specifying appropriate tasks and deadlines for their execution); organizing (allocating and providing resources necessary for the implementation of planned activities in a way that guarantees the effectiveness and efficiency of management); leading (directing, motivating to cooperate during the implementation of tasks); controlling (constant observation of progress and making corrective decisions)².

Various areas of activity requiring correlation (monument care, conservation-adaptive and economic investments, as well as didactic and commercial functions) require the participation of qualified staff.

Until a few years ago, discussions in the circles dealing with monuments focused mainly on the methods of conservation of objects. Practical aspects of monumental resource management were given much less attention. Today, the effectiveness of protection depends on the quality of management, and Monuments of History, as the most valuable and representative of the national heritage, should serve as role models in this respect.

The features of Monuments of History in Poland are varied. Over 40% of them are sacral and monastic buildings; 17% are urban complexes; 10% are post-industrial buildings; 8% are palace-park, castle-park and manor-palace complexes; 4% are castles, modern fortresses and landscape complexes. The rest are single objects with different historical functions and forms³. The vast majority of them are complexes of a large spatial scale. They differ from each other in their location, climatic and physiographic conditions, building and material structure and spatial structure, availability of transport links, availability of funds, management form or provenience.

The attempt to present, in further considerations, the most important conditions and factors determining the effectiveness of the protection of the object is based on 15 years of experience of the Monument of History - *"Srebrna Góra Fortress, a modern mountain fortress from the 18th*

¹ Management is an emerging distinctive specialized field dedicated to numerous studies and publications relating to various areas of economic and social life: Dictionary of Polish Language, <https://sjp.pl> access:10.07.2019.

² Encyclopedia PWN - <https://encyklopedia.pwn.pl/haslo/zarzadzanie;4000464.html>; access 10.07.2019.

³ Based on data from the National Heritage Institute: https://www.nid.pl/pl/Informacje_ogolne/Monuments_in_Poland/Pomniki_history/; access 2.08.2019.

century" belonging to the typological group of defensive monuments of the modern period (Fig. 1). The Silver Mountain Fortress was inscribed on the Monuments of History List in 2004.



Fig. 1 Srebrna Góra Fortress, fot. G. Basiński

Management of Srebrna Góra Fortress

The monumental complex of the mountain fortress brings together unique values and, at the same time, particularly complex conditions for their protection. Srebrna Góra Fortress is a complex of brick and earth buildings arranged in a range of fortifications with a length of about 3.0 km, located at an altitude of 680 - 750 m above sea level, on an area of varying altitude covering 106 hectares. The spatial and construction structure of the fortress was supposed to be connected with natural, mountainous terrain obstacles to limit as much as possible the access of enemy troops. Historically, this was a great advantage and today it is one of the important problems related to the accessibility of the object. A visit to the fortress requires a 25-minute walk on foot on a steep, over a kilometer-long ascent from the parking lot located at the foot of the fortress. This makes it impossible for the elderly and the disabled to visit the facility.

Until the 1990s, the fortress remained in a state of ruin subject to increasingly rapid destruction intensified by the sharp mountain microclimate. Conducted systematically from the beginning of the 2000s conservation works allowed to halt the deterioration processes in the main part of the fortress - the Keep. Objectives and priorities are concentrated around: liquidation of emergency states and building disasters, repairs protecting buildings against the impact of climatic conditions - especially moisture (with restitution of historical drainage and ventilation

systems) and the elimination of invasive greenery. Almost everyday problem is the organization of renovation works requiring overcoming barriers related to the terrain and height of the buildings. Renovation of the external layer of the keep towers, about 30 m high, accessible only from a moat with a depth of up to 9 m, may serve as an example. (Fig. 2)



Fig.2 Renovation of the keep tower of Srebrna Góra Fortress, photo: G. Basiński

An urgent solution is needed to enable the repair crews to access the progressing destruction of the Horn Fort and the esplanade connecting this fort with the keep of the fortress, once connected by bridges in the moats. Therefore, a significant part of the fortress is excluded from conservation works. Their commencement will enable the reconstruction of six bridges. The necessary construction documentation was prepared for this purpose, but the project did not receive financial support from the Infrastructure and Environment Operational Program. Another problem is the protection and tourist access to the permanent ruin of Chochołów fortifications, which are an integral part of the fortress, located in the State Forests area.

The objectives related to the use of the facility are:

- giving it a didactic rank suitable for the unique Monument of History through the development of exhibition and cultural and recreational functions (in the fortress, tourists are constantly given access to successive interiors with exhibitions and extended sightseeing routes);
- equipping the facility with technical infrastructure and networks, as well as services for tourists and users, which meet modern standards (ensuring the necessary parameters of water and energy supply and sewage disposal into urban networks with height differences and

mountain terrain requires special solutions⁴);

- ensuring safety for tourists and users - which in a mountain fortress requires considerably more work and resources than in other historic buildings);

- enabling public access to the historic complex (design documentation for a gondola railway connecting the town of Srebrna Góra with the fortress is being prepared).

The implementation of these tasks is a condition for increasing the number of tourists visiting the town, which will significantly increase the educational and promotional impact of the historical monument, but also its own income, which can be reinvested in the facility maintenance.

Continuous management and integration of different areas of activity in a monumental historic complex requires a separate management unit. Its legally established formula should be adapted to the local conditions resulting from the specificity of the building, the financial potential of the owner and the possibility of using various external resources. For Srebrna Góra Fortress, various organizational variants have been considered: a managing unit in the structures of the commune office (in practice, with numerous own tasks of the commune, this variant does not work), a local government cultural institution, a foundation, a unit managing a cultural park (the fortress is located within the boundaries of the first cultural park in Poland) and an economic entity.

The fortress is located on the territory of the agricultural commune of Stoszowice with an annual budget of about 25 million zlotys (PLN). With such a budget, the commune has considerably limited possibilities of financing investments and own contributions to programs subsidized from external sources. The financial condition of the local government and the difficult accessibility of the facility, which is a barrier to increasing tourist traffic and thus own income have necessitated the creation of a municipal limited liability company as the optimum formula for the management unit.

The company generates revenues from tourist traffic services and reinvests them entirely in the maintenance and development of the facility. The obtained income does not allow for the employment of qualified employees who would meet the needs of the company. The facility is managed by only a two-person technical team with the help of technical employees and seven tourist guides (a total of 11 people in the summer season)⁵.

The tasks of conservation repairs and fortress management have been defined and are to be performed in stages, but their scope and deadlines are not specified due to the difficulties in the acquisition of external funds and the lack of clear rules of conservation policy towards Monuments of History. Delays in securing the building against progressive deterioration obviously affect the constantly increasing scope of conservation interventions and the elimination of emergency situations.

⁴ Among others: water supply connection with a length of 1 300 m, power supply connection - 1 400 m with a transformer station.

⁵ The "Hevelianum" Gdańsk post-fortress complex, which does not have the status of a Monument of History and is managed by a municipal cultural institution, employs 38 people - however, it is difficult to compare rich city of Gdańsk with a small agricultural community.

Short deadlines for the execution of renovation works (from the granting the subsidy to its financial settlement), prolonged public procurement procedures and increasing difficulty in contracting specialized conservation works companies, as well as shortened construction season in mountain climate conditions cause serious complications in the use of subsidies.

The opinion-making and advisory body of the Commune Mayor is a social scientific and conservation council composed of specialists - members of the Military Architecture Committee of the Polish National Committee ICOMOS. The scope of the council's activity includes providing opinions on strategies, plans and actions, including:

- renovation, conservation and construction documentation, functional and utility programs, applications for external subsidies;
- projects, programs and tasks aimed at popularization and education about cultural heritage protection;
- changes in the ownership of communal properties in the park and changes in the way they are used.

The cooperation of the fortress management with the conservation services is very good.

To sum up, the Management Board of the Srebrna Góra Monument of History carries out the following continuous tasks:

- **collecting historical documentation** - iconographic, inventory, design, etc. (research in Polish and foreign archives);
- **monitoring** the technical condition of buildings;
- **preventive conservation**; conservation of historical tissue, technical infrastructure, equipment, small architecture used for the safety of tourists, etc.,
- **programming conservation and renovation tasks as well as modernization and adaptation tasks**;
- **obtaining funds** from own activities (tourist traffic service, organization of cultural and recreational events) and from external sources (EU programs, participation in competitions for co-financing works on monuments); preparing and financing application documentation for external grants from own funds (without a guarantee of obtaining them);
- **preparation of documentation** necessary for conservation, modernization and adaptation works (pre- and as-built inventories, bid and tender documentation - public procurement, design documentation - from concept to detailed design);
- **programming and preparation of design documentation** for investment tasks related to increasing the external accessibility of the fortress (construction of a gondola railway connecting the town of Srebrna Góra with the fortress and technical infrastructure facilities and networks; modernization of roads to the Srebrna Góra and the Srebrna Góra fortress);
- **implementation and management of investment tasks** (conservation and specialist arrangements; offer procedures, public procurement; provision of conservation supervision; financial management, etc.);
- **organization and management of tourist traffic**, continuous increase of the attractiveness of educational programs, forms of displaying historic values and tourist services;

- **organization of cultural and recreational events** aimed at tourists;
- **scientific, educational and popularizing activities** (dissemination of historic, landscape and functional values of the object; promotion of the historical monument in the country and abroad, tourist and information and publishing);
- **ensuring the safety** of facility users;
- **cooperation with stakeholders** (conservation services, commune authorities and business entities, non-governmental organizations);
- **activities for local communities** and their identification with the object (organization of cultural and recreational events for local communities);
- **cooperation with research centers and universities**; organization and participation in national scientific conferences;
- **providing qualified management, technical and tourist staff** (training of staff and guides).

Conclusions

The way of managing the architectural heritage resources is determined by the political and legal system, skills and qualifications of the management staff and their creativity, local conditions and available financial resources.

Nowadays, effective management of a Monument of History is much more difficult. In the case of larger renovation and conservation investments, there is no certainty of obtaining external subsidies in the next budget years, and as a result - there is no possibility of strategic planning, continuation and smooth implementation of tasks.

The development of management plans, securing the objects, maintaining them in good condition and ensuring educational functions requires, depending on the condition and specificity of the facility, multi-stage substantive and financial support programs. The experience of Srebrna Góra Fortress shows the need for a comprehensive plan integrating protective measures and development of the facility (especially in large-scale facilities). The complexity of problems related to conservation and renovation investments, modernization and adaptation of historic structures, as well as to conditions and requirements outside the conservation process mean that such a plan, taking into account the specific unique features of the historic structure, is

necessary⁶.

This is confirmed by the recommendations of the World Heritage Convention and the UNESCO Working Guidelines requiring the development of a management plan for a property to be inscribed on the World Heritage List. The model content of this document was given a lot of attention in the publications of Professor Bogusław Szmygin. We read in them, among others things,: *"The management plan presents a comprehensive vision of the assumptions, priorities, objectives, methods and instruments for the protection and management of a given good; it should be comprehensive and take into account all the essential factors that affect the good and include all the actions that the manager of the good should take to ensure its proper protection and management. The management plan is generally drawn up for a specific property (ensemble of property). It must therefore be individual and include data determining the specificity of the property, including the characteristics of its features and values, and the factors affecting this property."*⁷

The management plan should complement the task plans - working documents presenting specific, periodic tasks that meet the priorities and objectives set out in the management plan. They may concern technical, financial, educational, popularization, tourism or cultural and recreational problems. The provisions of these documents should guarantee the preservation of the historical integrity of the historic complex. A management plan equipped with task-based action plans may be an important element of the systemic protection of the Monument of History as such:

- one of the conditions for granting and holding the status of a Monument of History;
- the basis for the decision to finance the Monument of History from the funds of the

Ministry of Culture and National Heritage and external programs and to grant a multi-year promise of subsidy - provided the task plans justify such a need. The amount and arrangement of the grant should be determined by the information contained in the plan on the scale, type and complexity of the necessary actions as well as conditions and barriers not directly related to the maintenance, overcoming of which also requires financial input;

The content of the plans and their implementation should be reviewed and monitored by the Voivodeship Offices for Historical Monument Protection.

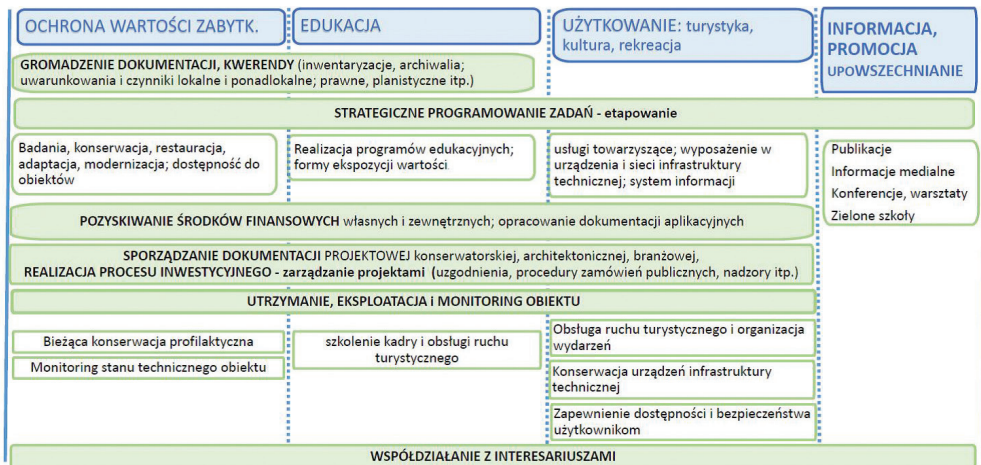
⁶ At the end of the 1990s the then General Conservator of Monuments initiated nationwide programs for the protection and conservation of selected categories of monuments, financed by the Ministry of Culture and Art. These programs were carried out by conservators and representatives of scientific centers from all over the country, specializing in the protection of a given group of monuments. One of the main objectives of the programs was to develop methods (standards) for the protection of monuments which were distinguished by their specific nature. For example, an important proposal of the "Protection and conservation of defensive architecture" program was the need to prepare - for the entire historic complex - a coherent protection and development program that preserves the integrity of the complex, including the strategy of conservation and renovation activities and related to conservation, development stages, based on the assessment of the technical condition, historic values and the possibilities of adaptation and modernization (today we return to the development of standards, often without taking into account the rich heritage of past years).

⁷ Szmygin B.; *Światowe dziedzictwo kultury UNESCO – charakterystyka, metodologia, zarządzanie*; 2018, Warszawa -Lublin; PKN ICOMOS, Politechnika Lubelska; pp. 211 - 212.

The specific features of the individual Monuments of History and conservation conditions make it difficult to establish a standard model of monument management. However, major task areas can be identified⁸:

- Planning and strategic programming;
- Collecting and preparing the necessary documentation;
- Acquiring financial resources;
- Current maintenance of the technical condition of the facility;
- Implementation and maintenance of investment tasks;
- Managing the utility program;
- Scientific, educational and popularization activities;
- Activities for the benefit of local communities;
- Cooperation with local governments, non-governmental organizations, entities conducting activities related to heritage protection and cultural tourism;
- Conservation services and scientific institutions.

The integrated record of task areas is presented in Table 1.



Tab. 1 Objectives and types of tasks in the integrated management process

The task of managing a Monument of History should be delegated to a separate entity conducting business activity and having its own budget (in the case of non-sacral objects - a business company, a non-profit economic entity, a communal/municipal cultural institution). Solutions in which a historic complex is one of several organisms (organizational units established for completely different purposes) managed by a single organizational unit do not usually bring proper results. Strategic decisions concerning the protection of monuments are not taken by

⁸ Task areas formulated on the basis of long-term cooperation between the author and local governments, hosts and managers of historical complexes.

specialists in this field. Financial resources generated by tourism and cultural education support execution of tasks that are not related to the protection of facilities⁹.

The ability to manage historical property is, apart from possessing conservation knowledge, a prerequisite for effective protection of Monuments of History. The issue of management should be the subject of substantive exchange of experience and cooperation between the monument managers and conservation services, the National Heritage Institute and scientific centers in Poland. According to Polish statutory regulations, the care of historical monuments is the domain of their owners. Protection, understood as providing conditions for the preservation of heritage, falls within the competence of national, regional and local bodies of state and local authorities. Substantive and financial support of the state for Monuments of History as the most valuable and exemplary group of monuments, in terms of care and management, should be included in a separate, governmental program of heritage protection.

⁹ Such a complex model operates, for example, in Kłodzko, where a municipal company manages a fortress, a municipal housing stock, a recreation and sports center and two swimming pools. The Giżycko Cultural Center manages the municipal cultural center, the cinema and the Boyen Fortress.

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