PROTECTION OF MONUMENTS AND HISTORIC TOWNS

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THEORETICAL ASSUMPTION OF HERITGE VALUE ASSESSMENT

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Conservation description of a historic monument involves identifying its essential elements and features.

Description of a material elements (inventory) is a rather simple technique based on established standards and procedures.

Conservation analysis of a historical monument involves assessing its values (monumental).

Analysis of a historical monument is more complex than the description - the difference results from individual features of each asset as well as the context to which it belongs.

Therefore, the system used for protecting historical monuments provides methods for description such properties (commonly applied), yet no commonly applied methods for assessing values were developed.

Heritage *versus* Historic Monument:

Heritage includes all elements (assets) that remain from past generations.

Such elements demonstrate different values, meanings, features, and information.

Set of heritage includes a far smaller set of historical monuments.

The status of elements considered as monuments should be formally confirmed, e.g. in a register or inventory.

The status of elements considered as heritage (which have no status of a historical monument or site) does not have to be formalized.

The collection of heritage is extensive and it includes all elements (assets) that remain from past generations - any entity (individual or collective) can nominate   a collection of its own heritage.

Therefore, a collection of heritage is practically undefined and open.

The heritage assets (not in the set   of historical monuments) do not have to be formally assessed, i.e. they do not have to be formally protected.

Set of historical monuments is the most valuable element of collection of heritage. Historical monuments represent meanings, values, features, and information that, if preserved, would benefit society as a whole.

In view of the currently applied criteria, set of historical monuments is closed and precisely defined.

Historical monuments should be formally and obligatory assessed.

Based on the analysis of a set of heritage it is possible to define a set of historic monuments.

The analysis of a set of historical monuments must be of comparative nature.

To carry out a comparative analysis and an assessment of a set of heritage/historical monuments sites, it is necessary to define two elements: assessment scale and assessment criteria.

Each assessment of a set of historical monuments involves adopting a combination of these elements.

Assessment scales can be either spatial (territorial),temporal,typological, etc.

Assessment criteria may involve various aspects, e.g. age, author, style, size, material.

In order to assess historic monuments according to more than one criterion, it would be necessary to establish their hierarchy, i.e. define scale for comparison (create hierarchy of importance).

Assessment of values of a single historical monument is of relative (comparative) nature, it concerns only specific features (criteria) and it functions only within defined set (scale).

Within the said limitations, value assessment can be considered as objectifying.

An entity carrying out assessment of values of a historical monument plays important position (as in case of any other assessment).

Individual entities differ considerably in knowledge, tastes, needs, and hierarchy of values, etc.

Assessing values within a particular set of historic monuments requires establishing a procedure under which a specific scale is ranked and specific criterion/criteria are established.

Historic monument - entire asset and its elements - is a material 'carriers' of many values, features, meanings, and information.

Some of these aspects decide whether an asset can be get (and keep) a status of historical monument and whether this status can be preserved.

Therefore, they should direct also the form of protecting a historic monument.

Values of historic monuments, which have been considered as crucial in the process of assessing values in comparative terms, can have so called 'value attributes'.

These 'attributes' of values of historical monuments include elements and features that 'embody' these values.

The attributes can be of both tangible and intangible nature and each attribute can have its material carriers.

It is possible to define to what extent a specific asset, considering its current material condition (technical condition and transformations), represents values whose presence determined a status of a historic monument.

This analysis involves verifying whether the value attributes meets criteria of authenticity and integrity. Authenticity and integrity are gradable features.

Authenticity of an attribute (element or feature) of a specific value is its accuracy/realness (in the broad sense of the Nara document).

Integrity it is completeness/wholeness (within the meaning of Operational Guidelines) of an attribute of a specific value.

Each process of value assessment involves applying specific criteria.

Stakeholders select value assessment criteria to be applied.

Different stakeholders can apply different criteria when assessing values of the same asset.

Assessment of values of a historical monument carried out by a conservator should be based on criteria according to which an asset is considered as historical.

Only these criteria can be objectified in the process of conservation value assessment (due to competences of monument expert).

Historical monuments are also assessed within numerous non-conservation systems used for assessing values.

In practice, conservators have to compete against each other for important positions not only in the hierarchy of stakeholders but also in the hierarchy of other criteria.

The formal monuments protection system is necesary - it allows conservators to secure their position as well their criteria in the existing hierarchies.

Assessment of values (monumental) should be included in procedures and documentation regarding the process of granting the status of a historical monument (to an asset) as well as conservation works.
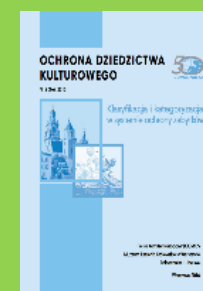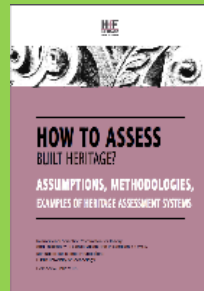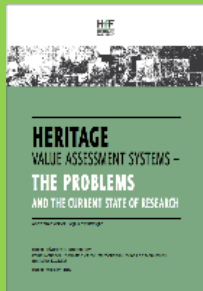
Defining the scale, criteria, and value attributes should become parts of the procedure identification of historical monuments.

Moreover, identifying these elements should be documented.

In order to determine (for conservator-related purposes) the scope and form of protection of a historical monument objectively, it is necessary to asses not only values of a historical monument (comparative, identifying value attributes) but also its quality (authenticity and integrity of value attributes).

Moreover, such assessments are necessary in order to prove (for society-related purposes) the need for protecting a historical monument as well as to identify the forms of protection to be provided objectively.

Publications presenting the-state-of-the-art in the field of heritage value assessment /Lublin University of Technology/:

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