



APGI – ITALIAN ASSOCIATION OF PARKS AND GARDENS

# **THE MANAGEMENT PLAN FOR A HISTORIC GARDEN** *methodological guidelines and general content*

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## FOREWORD

The Florence Charter, promulgated by ICOMOS-IFLA in 1981, marked a pivotal moment for those involved in the care and management of historic gardens, sparking a lively debate on methodological guidelines and criteria for intervention. The Charter had a decisive influence on the interventions carried out in the following decades in many of the country's significant historic gardens, raising awareness of the value and significance of these sites, which are as important as they are fragile. Since then, thanks in part to the numerous conferences organised both by public institutions – primarily the Ministry of Culture and many local councils – and by private associations, the debate has become increasingly intense. In recent years, there have been many legislative initiatives and documents produced. A volume edited by Carmen Añon Feliu in 2003 provides a varied and complex overview of this<sup>1</sup>. Furthermore, the need has emerged to produce a new document that could address the issues debated since 1981, updating the state of the art in light of the experience gained in the field over these decades.

It should indeed be noted that when the Florence Charter was promulgated, there was very little experience in the field of the restoration of historic gardens, and that it was only subsequently that a significant commitment on the part of public authorities emerged, leading to the practical application of theoretical principles, particularly in seriously compromised sites where restoration was practically impossible.

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<sup>1</sup> C. Añon Feliu (ed.), *Culture and Nature. International legislative texts referring to the safeguard of natural and cultural heritage*, Leo S. Olschki, Florence 2003.



This led to a debate on the methods and criteria for intervention, which was discussed at numerous conferences<sup>2</sup>.

An important opportunity for reflection on the ‘state of the art’ forty years on from the Florence Charter was the conference organised in November 2021 and sponsored by the University’s Department of Architecture; the proceedings of this conference contain papers that clearly illustrate how much the debate on interventions in historic gardens has evolved<sup>3</sup>.

Today, many universities offer dedicated specialisation or master’s courses, and theoretical and practical training courses promoted by regions such as Piedmont, Lombardy, Campania, Tuscany and Emilia-Romagna are also widespread. Only recently have the professional profiles being trained begun to align with the qualifications required by public institutions, in an effort to bridge the gap between the educational sphere and the professional sphere.

A positive development is contained in the PNRR, the Recovery and Resilience Plan approved and funded by the European Union, which is currently being implemented and provides for substantial funding for historic gardens and the recognition of the profession of ‘artistic gardener’.

A significant new development in the PNRR call for proposals concerns management plans. Precisely in light of the interventions carried out in past decades, there has been a growing realisation that many of them were rendered ineffective within a few years due to a lack of maintenance, as no management plan had been put in place to ensure the long-term sustainability of the results achieved.

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<sup>2</sup> C. Anòn Feliu, *‘Historiography of the Charter of Florence’*, published in the proceedings of the conference *‘What projects are there today for historic gardens?’*, Barbirey-sur-Ouche, Ministry of Culture, 2003, pp. 15–21.

3 S. Caccia Gherardini, M.A. Giusti, C. Santini (eds.), 1981/2021. *Historic Gardens. Experiences, Research, Perspectives 40 Years After the Florence Charters*, 2 vols., University of Florence, 2021.



This situation became apparent from an analysis of the projects submitted in response to the call for proposals: very few presented well-structured management plans, and at best they were limited to general outlines.

This observation highlighted the need to provide those responsible for the care and management of a historic garden – whether public or private – a methodological tool that could serve as a reference.

This is an issue that is also being addressed in other European countries and which plays a key strategic role. Once restoration work on a site has been completed, the aim is to ensure its long-term sustainability, taking into account the changing circumstances we face today – ranging from climate change to the sustainable use of natural resources, primarily water – whilst not forgetting the need to make this heritage increasingly accessible, conveying the values it embodies at all levels.

## STRUCTURE OF THE MANAGEMENT PLAN AND ITS CONTENTS

The management plan for a historic garden characterised by its compositional, historical and botanical complexity is a *working tool aimed at its conservation and enhancement as a cultural and landscape asset*. The objectives of the Plan are:

- 1) to set out management methods tailored to the objectives and strategies outlined in the Plan;
- 2) to ensure operational continuity, the transferability of data and knowledge, and of organisational and management strategies, as well as to facilitate consistent responses over time to issues relating to maintenance, conservation, management and enhancement;
- 3) outline possible strategies for sustainable use, environmental sustainability, ecosystem sustainability and economic sustainability.

The Plan is based on an analytical understanding of the garden's historical, material, botanical and natural characteristics, from which derive its cultural, botanical and landscape values, its potential and suitability for use and enjoyment, as well as the possibilities for promotion and interaction with the local area.

The general outline of the Plan provides a comprehensive framework of possible actions and will need to be adapted to the specific conditions of each individual garden, taking into account its size, complexity, management structure and geographical context, whilst recognising that it forms part of a system of cultural heritage assets at a regional level, subject to complex dynamics of change.



The Plan is a document open to updates and adjustments and must be structured at both a general and a detailed level. This will enable the collection, over time, of the results of experiments and new maintenance, enhancement and management strategies based on the understanding that the garden is a place subject to rapid and constant evolution, inhabited by living beings (not only plants, but also animals). Its conservation is therefore closely linked to care and maintenance, as well as to compatible use and enhancement.

The Plan will organise the relevant knowledge, drawing on available data and information to be gathered through further surveys and scheduled monitoring. It will also outline both the methods for securing funding and, more generally, the potential profitability of the site, as well as experimental initiatives, research, and maintenance techniques and practices capable of reducing costs and promoting eco-sustainable and energy-saving principles. The Plan may set out innovative maintenance measures, usage criteria and communication activities to raise the garden's profile at national and international level.

This forms the basis for a clearer definition of the role the garden can play in the community's process of identity development. The Plan can provide coherence to short-, medium- and long-term projects in the areas of conservation, safety and accessibility, ensuring responsible enhancement and use of the site.

(see slides 1-2-3).



The Plan will be organised into three parts:

- the first part concerning the *understanding*, organisation and management of available data, both for an assessment of the state of conservation and for identifying the garden's core values;
- a second part concerning *management*, with the definition of the objectives set by the managing body in relation to the conservation of the property and the improvement of management aspects, as well as economic sustainability, to be achieved through an organisational structure.

A key element is the development of a *new conservation and maintenance plan*, consistent with the site management project and the proposed economic strategy.

- a third concerning *management policies*, dedicated entirely to short-, medium- and long-term strategies.

## 1. KNOWLEDGE

The first part (slide no. 4) concerns the collection and organisation – in both paper and digital formats – of data relating to the *current state of the site*, with particular reference to spatial and landscape data, historical data (both general and sector-specific), and, finally, existing surveys of both the garden as a whole and its individual parts, as well as botanical aspects and vegetation cover. To these must be added surveys of architectural, sculptural and furnishing elements, where present. Particular attention must be paid to the surveys – already carried out or to be carried out – of the plant and hydraulic systems both inside and outside the garden. The latter are to be understood in terms of both drainage and water supply and will also concern the historic systems. During this phase, the existing data, surveys and monitoring records for morphosymptomatic, stability and phytopathological assessments already carried out on the vegetation will also be analysed and digitised, both to improve the health of the plants and to ensure more prudent risk management. For the purposes of future planning (routine and exceptional maintenance, restoration, compatible uses, etc.), it is essential to identify the compositional, historical, landscape, botanical, artistic, natural and environmental values to be preserved.



This initial set of data will be followed by information on the current management structure, outlining the *organisational and financial model*, as well as the professional roles currently in place, including local authorities and any local associations, as well as other parties involved in the management. The current overall financial strategy will also be outlined (sources of funding, forms of public and private financing, sponsorship, etc.). Information will also be gathered regarding the various uses to which the garden is put, in order to assess their compatibility with its general state of conservation. Particular attention will also be paid to management and economic issues, as well as to the safety and accessibility of the site. Alongside the more strictly economic data, this information is vital for planning a strategy that takes into account the sustainability of use.

A further category of data to be collected concerns maintenance (routine and non-routine) and the care measures currently being carried out, in order to understand the relationship between these and the general state of conservation of the property, and to identify within the Plan any new measures or tools, machinery and maintenance practices that can ensure both the best possible conservation and ecosystem and environmental compatibility. A distinction can be made between actions concerning the soil, the vegetation, the water features and the installations, as well as the architecture and other structures present in the garden.

This section of the Plan may be incorporated into a summary and reorganisation – including in digital form – of the existing data, to facilitate comparison and ensure their optimal use, both in *assessing the current state of conservation* and in exploring potential uses, visits and forms of engagement that are feasible and compatible with the heritage asset.



This first section may also include all materials relating to restoration work carried out in recent decades, where such materials exist and are available for consultation, as well as the established practices of routine and major maintenance carried out over time.

As part of the fact-finding exercise, particular attention must be paid to *the natural environment* (undergrowth, meadows, etc.) and biodiversity – in other words, to all those aspects that arise from management that is mindful of ecological and environmental evolution and function.

The Plan will serve to organise the available knowledge, drawing on existing data and information gathered through further surveys. The material collected and appropriately processed will be used to assess the *state of conservation* and the *current management model*, and will form the basis upon which *projects and strategies for the garden's future* will be developed, with the aim of preserving its components, ensuring its sustainability, and enhancing its value as a cultural and landscape asset.

The aim is to establish a database open to constant updating, which will guide the assessments and policies of those who will take turns in the care and management of the site. It will clearly distinguish between operations aimed at maintaining the 'primary structure' and those concerning its 'superstructure', i.e. the parts most subject to change (flowerbeds, borders, blooms, collections, etc.)

## 2. MANAGEMENT

The second part (slide 5) of the Management Plan will contain the *New Conservation and Maintenance Plan*, aimed at preserving the overall layout and all the garden's plant, structural, architectural and decorative elements. This section will also outline the proposed management structure (slide no. 6) and set out the care and maintenance objectives derived from an assessment of the garden's current condition (slide no. 3). These will concern both the various components – categorised for practical purposes – and the relationships between them. The identification of *conservation, management, enhancement and communication objectives* forms the core of the Management Plan and is also a prerequisite for planning any restoration work and specific interventions that are envisaged, which may concern the soil, plant-related aspects, ecosystem aspects and productive aspects. Water supply sources will also be identified, along with the resources required for proper maintenance, and the products and practices best suited to the character and specific features of the garden.

*The necessary skills and technical roles* required to ensure the quality of routine maintenance will also be outlined; this should not be viewed as a repetitive and uncritical task, but rather as a key element in ensuring the overall aesthetic quality of the garden through the proper care of its individual elements and the preservation of their balance.

A work schedule must be drawn up, along with arrangements for staff organisation, training and the duties they perform, equipment, products, etc.



The *new conservation and maintenance plan* will include explanatory diagrams and, in the case of a large or complex garden, may be divided into sections. It will also be supplemented by a set of technical data that is easy to communicate, as it is intended for the curator, head gardener, landscape gardener and general gardener. The plan will also highlight the garden's critical issues and the actions to be taken. It will also indicate possible future *extraordinary maintenance and restoration* work on specific areas and structures (man-made or living architectural features, spaces for displaying collections, greenhouses and botanical collections, etc.).

The Plan must also include a conservation and maintenance scheme for the entire plant heritage at various levels (trees, shrubs and herbaceous plants), providing for a monitoring programme (for example, for trees of particular value at two years, five years and over ten years) which will supplement the general monitoring plan for the entire heritage, with procedures to be defined in accordance with the characteristics of the garden. The project in question will set out criteria and methods for the planned long-term management of trees that are critical or of particular value, including a replacement or renewal plan, as well as the necessary maintenance, fertilisation, pruning, etc. All this is also intended to identify risk management criteria and ensure the safety of people and property.

The *new conservation and maintenance plan* will also set out the specific measures to be taken regarding the soil, vegetation, ecosystems and the maintenance or enhancement of productivity – where applicable – in relation to internal or external areas directly linked to the property.

Particular attention will be paid to this latter aspect, as in most cases it constituted a significant factor that was lost, either wholly or in part, during the 20th century.

With regard to the *management of the entire complex* (slide 6), the first step will be to define and outline the *general objectives*, which will depend on the characteristics of the garden and its history, as well as on how it fits into the socio-economic context of which it forms part. This outline proposes a number of objectives that are common to all types of garden, such as: sustainability in the broadest sense, accessibility (including cognitive as well as physical access), and safety in both day-to-day management and during special events and initiatives.

Closely linked to this aspect is *compatibility of use*, ideally regulated or at least defined by a ‘Code of Conduct’ setting out the priority guidelines. These will identify the procedures for managing public presence (both on a day-to-day basis and during events and visits), compatible uses, limits and prohibitions, visitor numbers in relation to the most fragile or at-risk areas, as well as the planning and organisation of control systems, in collaboration with security staff. All of this must form the basis for assessing the potential of the site in terms of enhancement and cultural policy, no longer to be understood exclusively in terms of tourism and visits, but as a historical and landscape heritage site, a place of culture, leisure, production, biodiversity and natural beauty.

Depending on the objectives, communication criteria and methods will be tailored to reassess how the garden in question is perceived by local communities and at national or international level.



The management structure will also aim to establish a portfolio of park and “-led projects”, consistent with the conservation and enhancement strategies outlined, and which address various issues, including with the aim of promoting and supporting technical experimentation in various sectors (major maintenance, recycling, energy saving, biodiversity conservation, as well as educational projects, partnerships with other national and international organisations, special restoration projects, etc.).

Improving the quality of the garden – understood as a space for culture, nature and productivity, with potential for diverse applications – will also depend on the quality and nature of the projects undertaken by the management body, as well as on the interactions it manages to establish with other national, regional and local stakeholders.

The identification of objectives must be directly linked to the definition of the organisational and operational structure, for which an internal and external chain of responsibility will be established, as well as a potential technical and operational team, comprising professionals with expertise in the conservation and care of the plant heritage, built heritage and production.

The issue of *ongoing training* for technical and administrative staff, as well as landscape gardeners, who are responsible for its upkeep, must form the basis for the quality of both the garden’s landscape conservation and its management and enjoyment.



Particular attention must be paid to both the study and the potential revival and application of *traditional cultivation techniques* specific to the garden or estate, as these sometimes represent an expression of the site's history and a prerequisite for its form. A further aspect concerns the ever-increasing demand for ecosystem and environmental sustainability, which may involve best practices in the areas of maintenance, energy saving and the safeguarding of the natural values inherent in every garden.



### 3. SHORT-, MEDIUM- AND LONG-TERM POLICIES AND STRATEGIES

The third part of the Management Plan (slide 7) focuses on two themes: the *economic and financial strategy* aimed at ensuring the conservation of the site, and the *strategies for public access, enhancement and communication*. These two aspects are closely linked, as the definition of a policy and strategy for economically sustainable conservation also depends on the way in which the garden is ‘presented’, promoted and showcased at both local and national levels.

Each garden will be able to identify its own management strategies in relation to its plant heritage, its historical and artistic heritage, and its ecosystemic and natural aspects.

Nor should we overlook the *sense of identity* it can provide for communities, both local and wider, which can serve as a promotional tool and an awareness of its value.

Among the objectives that could form the basis of a strategic plan, in addition to economic sustainability, there could also be ways to *enhance the garden’s intrinsic values*: for example, through a strategy of botanical enrichment by creating new collections compatible with the site’s characteristics, or through the reintroduction of old cultivars. Similarly, further restoration of important areas and sections in poor condition could be envisaged.



Among the strategic objectives is the gradual and necessary adaptation of the garden to *the ongoing climate change*, which can be addressed in various ways, but which must be taken into account with a view to the future.

To safeguard the natural and flora-fauna values within the garden and the surrounding area, we will need to work over time to foster a shift in the general perspective on the perception of its ‘beauty’, by raising awareness of values that have only recently come to be recognised for their importance and uniqueness, linked to the naturalness of the whole or its parts. It will also be possible to identify potential experiments, such as in the field of *ecosystem management*, in relation to climate change, envisaging, for example, the introduction of *natural varieties* that are better suited to the soil and climate conditions, whilst respecting the garden’s compositional values and history.

The economic and financial strategy can be approached from two angles: one of these is the raising of funds, which remains a crucial aspect and will depend heavily on the public-private partnership that the garden’s management is able to foster. The garden’s *economic sustainability* can also be considered by viewing it, first and foremost, as an asset capable of generating employment.

Another front will concern, for example, energy-saving policies. A strategy must, however, be defined for the conservation and proper maintenance of the botanical heritage, the historical, architectural and artistic heritage, the ecosystemic aspects and the plant-related aspects, building on the new possibilities opened up by the digital management of data relating to the garden.



Important experiments are currently underway in this regard, which can be tested and adapted to the volume of available data. It will be essential to employ staff with specific professional skills, who undergo continuous training to ensure their knowledge remains up to date. The Management Plan is the framework within which decisions regarding work and planning can be made, and processes initiated to foster growth and envision the future of a garden, based on the knowledge reorganised and rationalised within the Plan.

Strategic priority must also be given to ensuring compatibility of use (the criteria for which will be further specified in the ‘Regulations for Use’), and to ways in which visitor services and hospitality can be enhanced, with particular attention paid to improving accessibility. These criteria will be based not only on the growth of historical knowledge, but also on the awareness that the garden is, today more than ever, a bastion of multiple values and a multifunctional space.

Communication and promotion strategies will need to be rethought and reoriented in light of this *multidisciplinary nature* and the various aspects and qualities that the garden embodies, bringing to the fore themes and interests to be promoted on a national and international scale, depending on its significance.

In order to devise and develop an *effective communication* strategy, we will provide the interpretative framework for the garden and the guiding principles

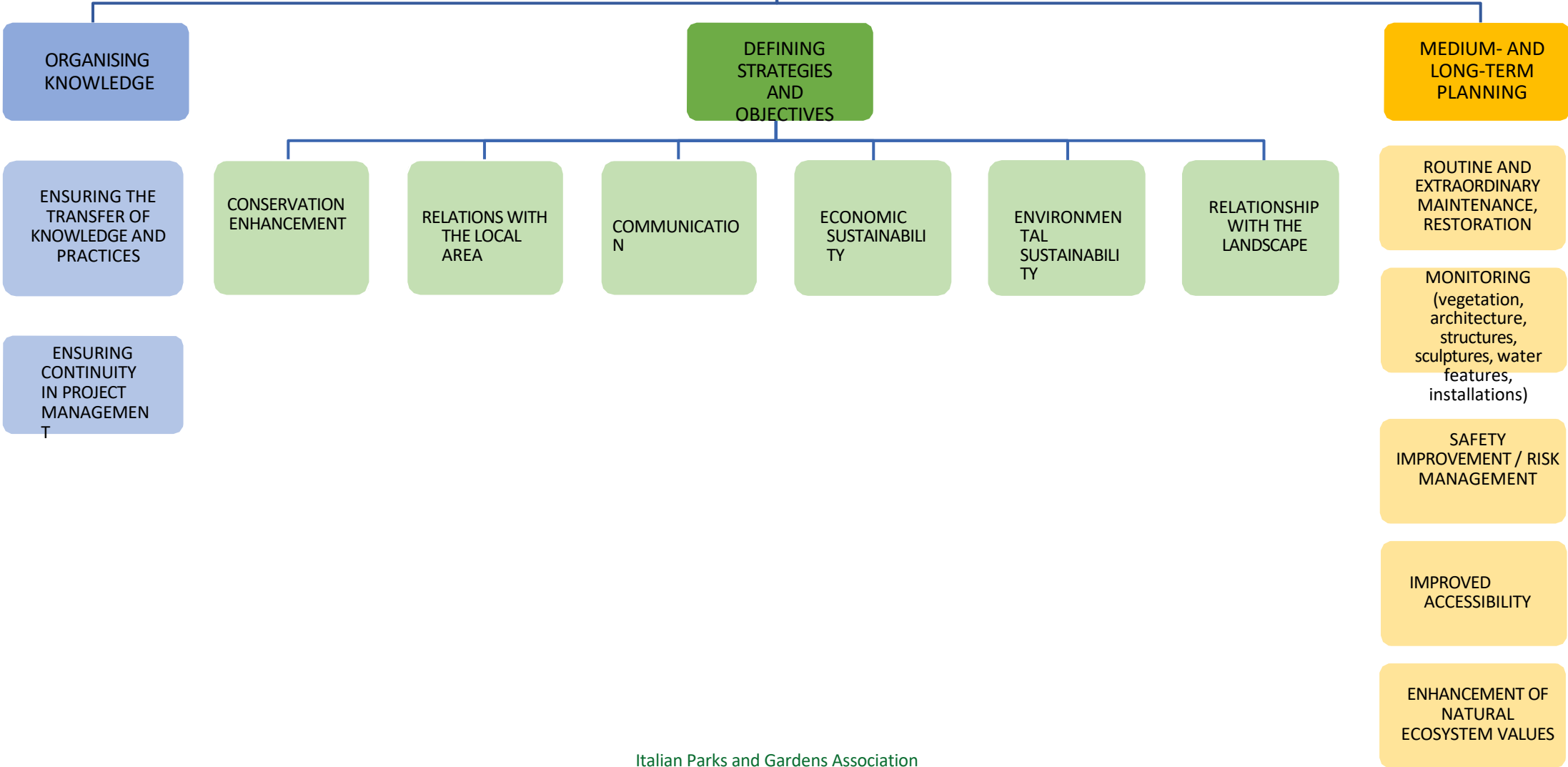
for communication that will stem from its history, the figures associated with it, and its compositional and botanical features.



With the support of specialist staff, it will be possible to plan an enhancement and redefinition of communication, both in terms of promotion and the visitor experience.

The aim will be *to broaden knowledge* in order to redesign the visitor experience, conveying values and knowledge, involving visitors in the life of the garden, in plant maintenance and propagation processes, and fostering engagement through a flexible approach that strikes a balance between the spontaneity of a free-roaming visit and the emotional and educational potential of a guided tour.

**PURPOSE  
OF THE MANAGEMENT  
PLAN**

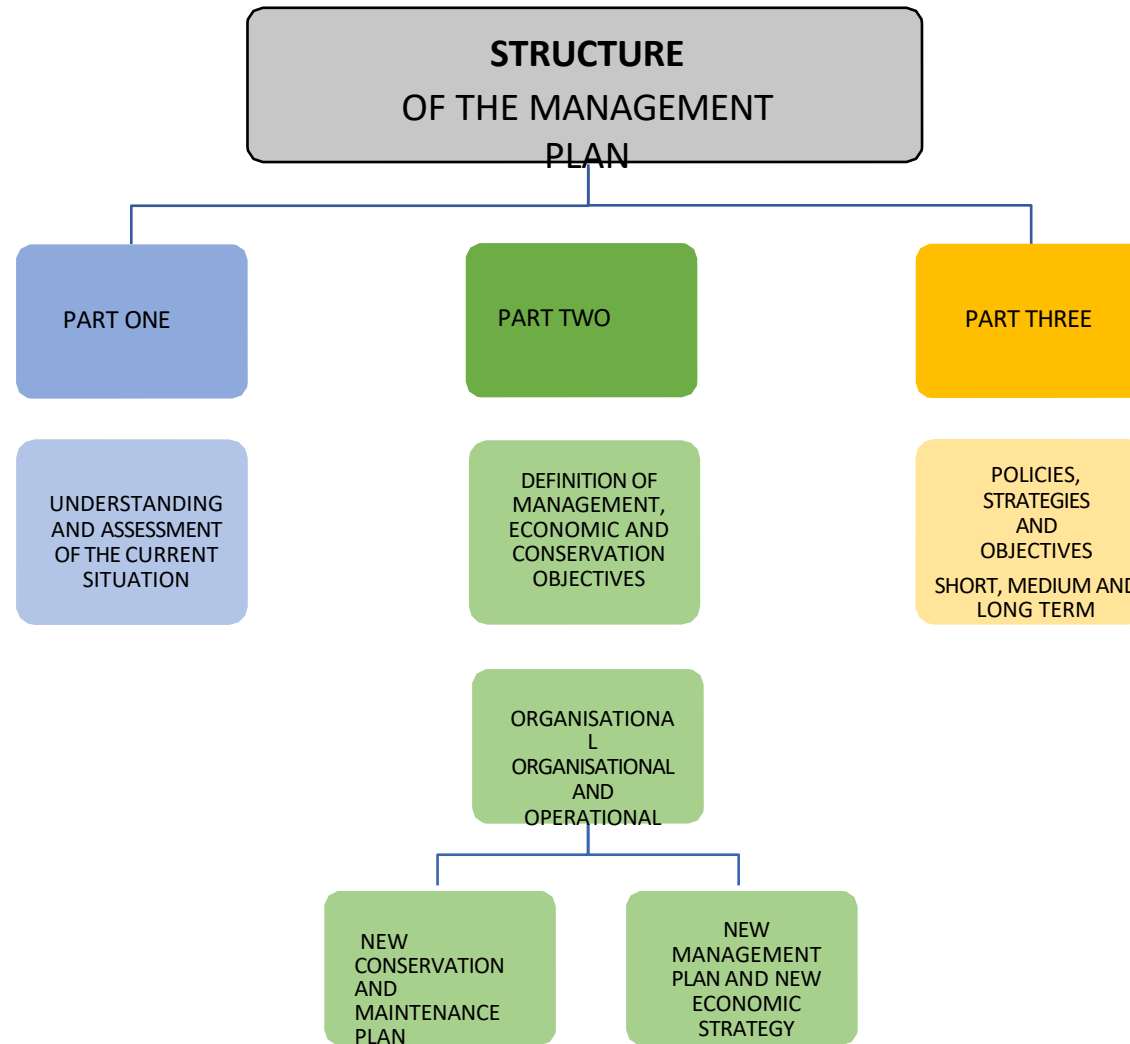


**GENERAL CHARACTERISTICS  
OF THE MANAGEMENT  
PLAN**

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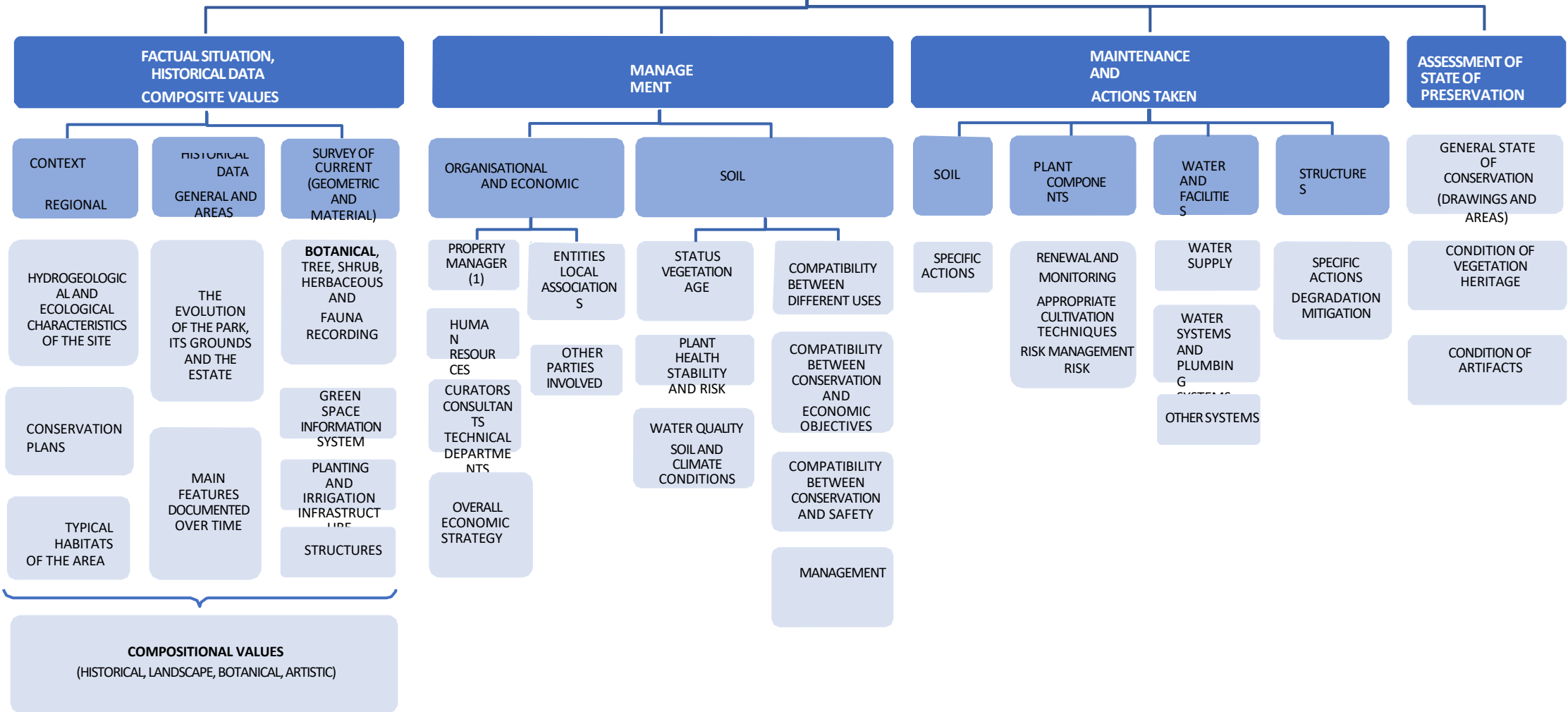
STRUCTURED:  
- GENERAL LEVEL  
- LEVEL OF DETAIL

FLEXIBLE  
(expandable, updatable, easy to  
consult)



# PART ONE KNOWLEDGE AND ASSESSMENT

## OF THE CURRENT SITUATION



# PART TWO NEW CONSERVATION AND MAINTENANCE PLAN

## CONSERVATION OBJECTIVES FOR CONSERVATION

GENERAL DESIGN

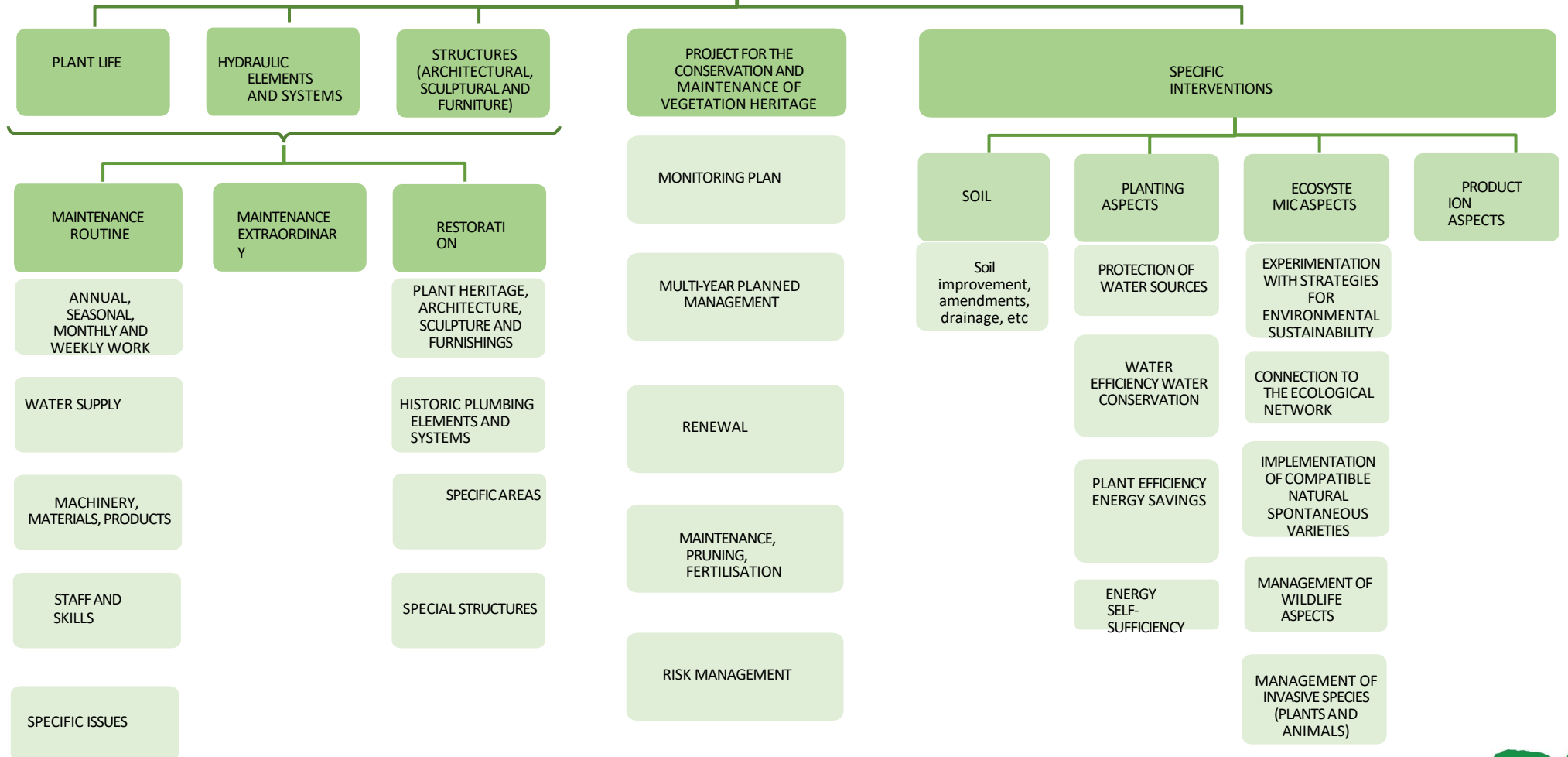
ARCHITECTURE SCULPTURE

FURNISHING FURNISHINGS AND FUNCTIONAL ELEMENTS

WATER FEATURES AND SYSTEMS

PLANT LIFE

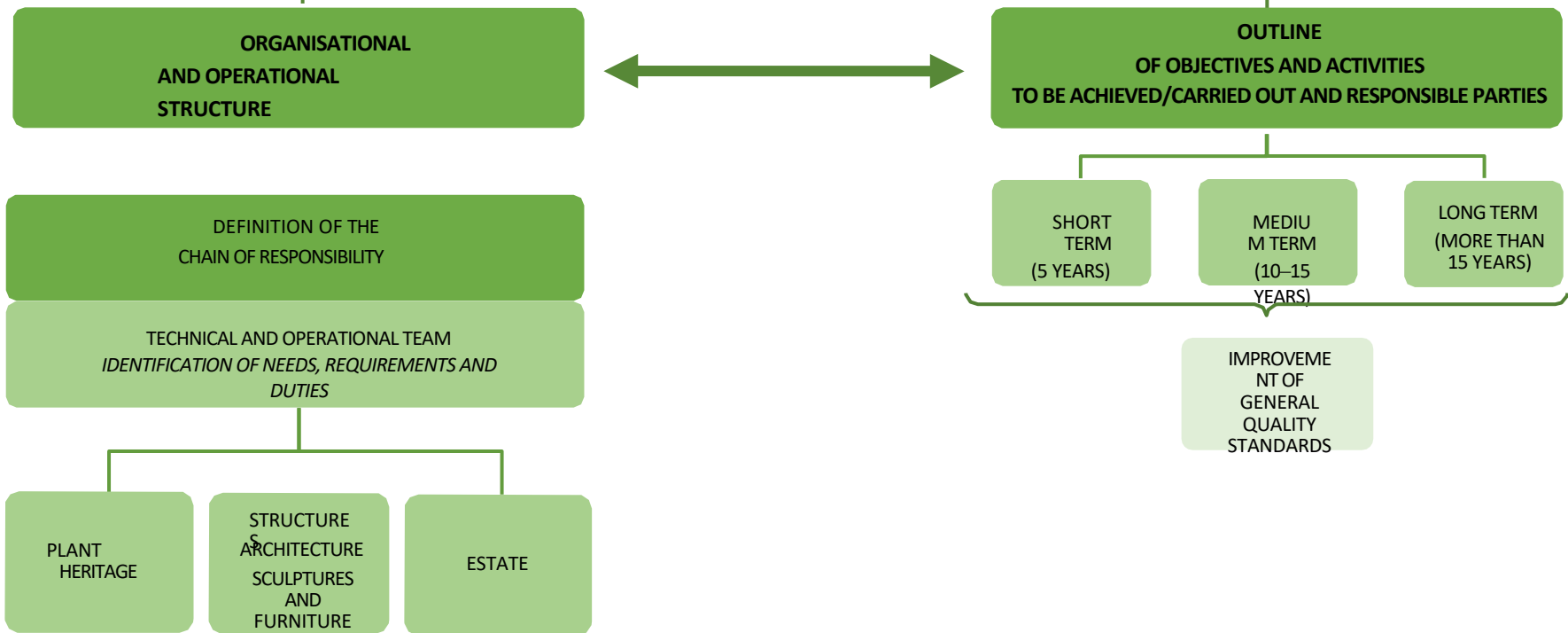
## PLANNING OF INTERVENTIONS



**PART TWO**  
**MANAGEMENT OF THE ENTIRE**

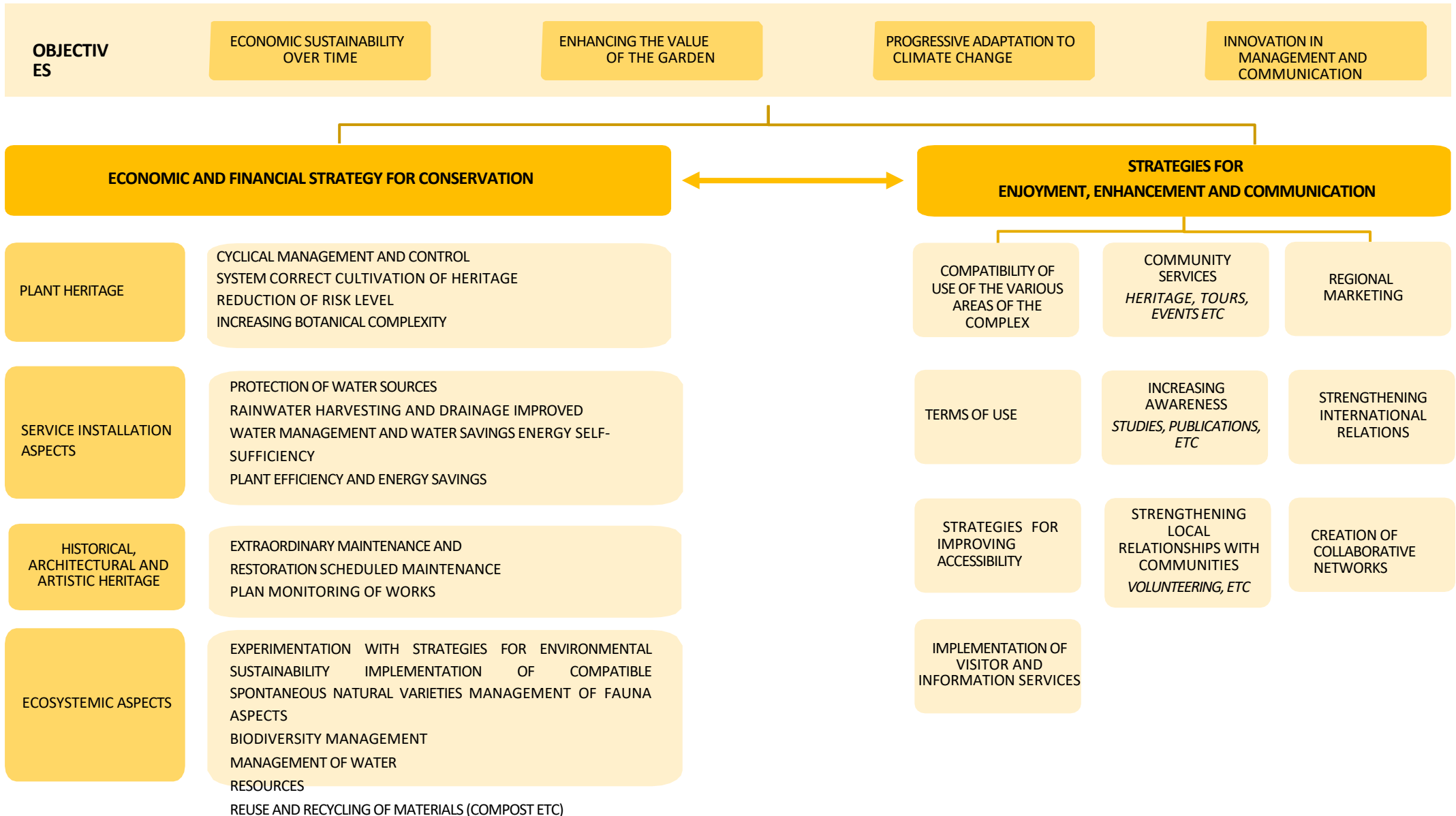
COMPLEX

**OBJECTIVES  
MANAGEMENT**



PRODUCTION

THIRD PARTY  
**POLICIES AND STRATEGIES**  
**SHORT, MEDIUM AND LONG TERM**





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