

## **HERITAGE DOCUMENTATION EDUCATION: AN INTERNATIONAL COLLABORATIVE ACCOUNT**

S. Elwazani

Architecture & Environmental Design Studies Program - College of Technology, Bowling Green State University  
Bowling Green, Ohio 43403-USA - selwaza@bgnet.bgsu.edu

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### **ABSTRACT**

Education and training in the documentation of heritage resources enhances efforts for saving and conserving heritage resources. When done across national borders, they have, in addition, a potential for rewarding international collaboration. Collaborative conservation efforts by parties in different countries are not uncommon, but collaboration between academic institutions, and specifically in the documentation area, is much less so. This was a motivating reason for the author to build upon his heritage documentation teaching experience in the US and initiate, plan, and conduct documentation projects for students of architecture in Bahrain and Lebanon in tandem with university partners in those countries. This paper aimed at describing the documentation experiences in the three countries and highlighting the collaborative characteristics of the undertaken international projects. Because of the author's personal involvement in the projects, first-hand data was the main source of information. The results of this paper will add to our understanding of documentation projects between international partners and provide salient parameters to consider when contemplating undertakings of this nature. On a more comprehensive level, the results bring out a case for developing guidelines for international cooperation in the heritage documentation in the interest of conserving world heritage.

### **1. INTRODUCTION**

The value of education and training in the conservation field cannot be overemphasized. Education and training is a fundamental function of heritage resource conservation programs on any level, local, national, or international. As a prerequisite to engage in the conservation process, education encompasses all sorts of resources including archaeological, architectural, landscape, and object resources. The importance of this prerequisite function explains why education, training, and information dissemination are at the forefront of conservation programs across the globe.

Attempting to tap into the educational components of conservation programs in countries across the globe is not an easy task. Tracing education initiatives of some international heritage organizations is more convenient. CIPA (2004), for example, affirmed that organizing and encouraging "the dissemination and exchange of ideas, knowledge, experience and the results of research and development" is an objective of the organization's mission. Similarly, ICOMOS (1993) advanced the aim of promoting "the establishment of standards and guidelines for education and training in the conservation of monuments, groups of buildings ('ensembles') and sites." The guidelines further encourage the international exchange of ideas on educational philosophies and approaches and deem conservation education as a lifetime continuum encompassing schools, universities, and continuing education opportunities.

This study describes experiences in administering historic architecture documentation projects in three countries. The author has been teaching heritage conservation and documentation at Bowling Green State University in Ohio for fifteen years. Internationally, he had administered two documentation education opportunities to students of architecture: "Documenting Heritage Structures" course at the University of Bahrain in 2002 and "Documenting Historic Structures" workshop at the Beirut University College (later, the Lebanese American University) in 1994.

The educational documentation projects in the three countries involved acquiring, reducing, and presenting information in connection with one or more of three types of documentation:

- Documentation for identification: to discern and classify different types of historic resources including districts, sites, buildings, structures, and objects. Documentation projects of this type were administered in the US and Bahrain.
- Documentation for recognition: to evaluate and include historic resources on a national list of historic properties. Documentation projects of this type were administered in the US and Bahrain.
- Documentation for intervention: to facilitate rehabilitation, restoration, or other intervention through making available a set of measured drawings. Documentation projects of this type were administered in the US and Lebanon.

By country, the documentation projects break down as follows:

- US: documentation serving identification, recognition, and intervention
- Bahrain: documentation serving identification and recognition
- Lebanon: documentation serving intervention

Springing from the author's US extensive experience in the US, documentation activities in Bahrain and Lebanon embodied initiation, planning, and implementation tasks in collaboration with international institutions, in this case with university administrators, faculty, and students. This line of collaborative activities sheds light on a contributory approach to protecting and conserving world heritage. This paper aims at describing the documentation experiences in the three countries and highlighting the collaborative characteristics of the Bahrain and Lebanon projects.

The discussion will be organized under the headings US Experience, Bahrain Course, and Lebanon Workshop. Research data for this paper has been derived primarily from the author's first hand engagement in administering the projects at home and abroad. Except for Figure 1, corroborating images are products of student work.

### **2. THE US EXPERIENCE**

At Bowling Green State University, heritage documentation has represented an ingredient of course offerings since 1990.

However, documentation developed into a conservation-integrated content mostly in Arch 401, Historic Preservation, a course offered every fall by the Architecture/Environmental Design Studies Program. As mentioned in the Introduction, three projects account for this documentation experience; they were sequenced in the course events to maintain integrative flow of thoughts on conservation theory, in general, and conservation process, in particular. However, only two projects will be introduced because of their relevancy to the offerings in Bahrain and Lebanon, respectively: a) Research and the National Register, a “documentation for recognition” project, and b) Measured Surveys, a “documentation for intervention” project.

### **2.1 Research and the National Register Project**

This project aimed at developing research and documentation abilities for corroborating historical and architectural significance of historic buildings in light of the US National Register of Historic Places (NRHP) criteria and procedures. The National Register sets standards and develops guidelines and a variety of models and demonstration products that can be adapted and used throughout the nation” (Shull, 2002). Although the NRHP criteria and procedures were set as the reference for the project, research and documentation activities were not necessarily geared to produce formal National Register nomination—for the ultimate purpose of listing on the Register. This cautious exception sprang out of the fact that the demanding nomination process would go beyond the learning objectives of the project. Students, in groups, directed their energies into collecting, analyzing, and presenting general information about the building (name, location, function, etc.), but more importantly an assessment and characterization of the building’s physical integrity and its historical and architectural significance.

The approach employed for using project documentation subjects was individual in some course offerings and collective in others. Individual subject approach allowed groups to select and work on separate subjects, each group turning in an independent report on that subject. Collective subject approach allowed all groups to work on a single subject, with each group working separately and still turning in its own report. While an individual approach provided learning diversity by the class being separated into a number of subjects, the collective approach provided learning focus by the class being converged on only one subject. The Fall 2000 documentation for recognition project provides an example of using the collective approach. The class was assigned the Detention Home in Bowling Green, Ohio (Figure 1) and each student group was required to research, analyze, and report on the structure independently. This project is in parallel with the 2002 Bahrain’s recognition project (to be discussed next), although the latter followed the individual subject approach.

### **2.2 Measured Survey Project**

This project involved field and studio work to produce a set of measured drawings in light of the US Standards and Guidelines for Architectural and Engineering Documentation. These are the reference for developing documentation for the Historic American Building Survey (HABS) and the Historic American Engineering Record (HAER) Collections in the Library of Congress (HABS/HAER, 1990). The intent was to acquaint students with the principles and methods of measured surveys but, more importantly, to build skills in field dimensional measurements and respective studio drafting techniques.



Figure 1. The Detention Home, Bowling Green, Ohio, the collective documentation subject for the Research and National Register Project

The Standards and Guidelines were followed conservatively, adhering primarily to the essentials rather than to strict observance. This conservative approach was necessary in order to meet the project learning objectives under time constraints.

As in the Research and the National Register Project discussed above, the approach employed for using project documentation subjects was individual in some course offerings and collective in others. The individual subject approach allowed groups to select and work on separate subjects, each group turning in an independent set of measured drawings on that subject. The collective subject approach differed in application from that of the previous, Research and the National Register, project. Here all groups were assigned a single subject, but each group worked separately to survey and produce measured drawings only for a certain part of the subject building, for example, the east and south elevations.

The Summer 1989 measured survey project for a Warehouse in Bowling Green, Ohio (intended for conversion to student housing) provides an example of using the collective approach. Figure 2 includes the floor plan and the top view plan of the warehouse and represents measurement and drafting effort of one group only. This example project, which had been offered under another class title, is in parallel with the Lebanon measured survey project (to be discussed later).

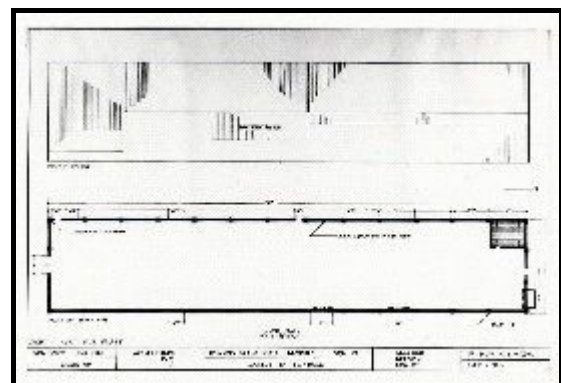


Figure 2. Collective subject measured survey project for a warehouse in Bowling Green, Ohio

## 2. BAHRAIN COURSE

A unique documentation undertaking transpired thousands of miles from the author's home base of small town Bowling Green, Ohio. The undertaking was originated during the author's relocation to the Kingdom of Bahrain for a 2001-02 Fulbright lecturing and research assignment at the University of Bahrain's Division of Architecture. In consultation with the Division, a decision was made to offer, in Spring 2002, Documenting Heritage Resources under the course Arch 420. The special topics nature of the course provided flexibility to offer impromptu subject matter—in this case documentation. The question of fitting the course into degree requirements was answered by designating it as a professional elective. As mentioned before, the course incorporated documentation for identification and for recognition. The discussion below focuses on the latter type through the "Research for Nomination and Listing," the second project in the course sequence.

Commencing the fourth week of classes, the project Research for Nomination and Listing lasted for four weeks at the rate of two class meetings, for a total of twenty class hours. The project involved selecting and researching a heritage building to establish its historic significance—being cultural, architectural, or other. The results were incorporated into a documented report. Having been acquainted with the Bahraini cultural heritage, the author was by now in a position to discern project possibilities, especially as to the accessibility and viability of certain heritage sites. The first task of each student group was to locate and present building alternatives for narrowing down to only one building as the group's project subject.

The theoretical grounding for students to engage in the project was attempted through readings and discussions. Some country listing strategies were recalled, but the strategy used as a reference for the class project was that of the U.S. National Register of Historic Places (NRHP). The criteria and procedures for this leading U.S. nomination and listing program were summoned in service of our recognition project. This strategy "transfer" was cautiously adopted to assure appropriateness to the Bahraini context. There were a number of facts, intentions, and actions to moderate the adoption: a) although a small country, Bahrain has a rich repertoire of pre-historic and historic resources that press for recognition and listing; b) Bahrain had no standard system of heritage resource recognition and listing; c) the NRHP strategy was applied with discretion and aspects that have universal applicability were emphasized; d) students were alerted to the reason for consulting an external strategy and to the discretion needed in this regard; and e) students were alerted to the need for a national, indigenous system for recognizing and listing the country's heritage resources.

The objective of the Research for Nomination and Listing project was to offer an experience in heritage buildings recognition theory and process within the context of conservation interventions, such as rehabilitation and restoration. This was addressed by placing this (second) project in the course sequence to build on the previous project and to provide preparation for the next one. The previous (first) project fell in the category "Documentation for identification" and dealt with discerning and classifying different types of historic resources, including districts, sites, buildings, structures, and objects. The students located and surveyed resources which ran the gamut of resource types, and by doing so, set the stage for our recognition project. In turn, the recognition project, by its nature, laid out the basis for decisions concerning building use and physical integrity, necessary concepts for the success of the next (third) project. The third project dealt with a rehabilitation intervention for a historic

building selected in consultation with the author, one building per student group. The students diagnosed the use and physical problems in the selected building, and in light of a set of historic integrity-based rehabilitation standards (these were the U.S. Secretary of the Interior Standards for Rehabilitation), proposed intervention solutions.

The project was carried out by four student groups as shown in Table 1.

Group	Building, Location, Historic Date	Historic Use/ Current Use
1	Al-Hydaya Al-Khalifiya Boys School, Muharraq, 1919	School/ Vacant
2	Sheikh Isa House, Muharraq, 1937	Residence/House Museum
3	AL-Khamis Mosque, Manama, ca. 707	Mosque/Vacant
4	Center for the Bahrain Courts, Manama, 1937	Higher courts/ Museum

Table 1. The building subjects for the Nomination and Listing project

The four subjects of the project are illustrated in Figures 3 through 6.

## 4. THE LEBANON WORKSHOP

A more condensed documentation experience took place in Lebanon in Summer of 1994. It was a five- day long workshop at, and in collaboration with, the School of Architecture and Design at the Beirut University College in Byblos—later the Lebanese American University.



Figure 3. Al-Hydaya Al-Khalifiya Boys School,



Figure 4. Sheikh Isa House, Group 2 documentation subject



Figure 5. Al-Khamis Mosque, Group 3 documentation subject



Figure 6. Center for Bahrain Courts, Group 4 documentation subject

This collaborative effort emerged out of a meeting in North Carolina with the Academic Dean of the College two years earlier. When the opportunity presented itself for a trip to the Middle East in Summer 1994, the author re-initiated the contact with the Academic Dean proposing a workshop in association with the School of Architecture and Design. The School Director and a surveying professor were instrumental in cementing the association. The surveying professor acted as a workshop co-instructor and the liaison with the School.

The time framework controlled workshop planning. Based on previous exchange of information, the Lebanese collaborating professor presented building possibilities for documentation, and finally the massive crusades-era St. John Cathedral and Baptistery in Byblos was chosen as the documentation subject (Figure 7). Early the first day, the two collaborating educators completed a surveillance visit to the cathedral and, and by the day's end, a plan for a measured survey and drawing of the edifice had been drafted. For the next four days, student groups received guidance on how to plan and execute a) a building survey, and b) a set of measured drawings. Students were more easily able to grasp the guidance during actual field survey steps and studio drafting.

The BUC School of Architecture and Design found it appropriate to accommodate the workshop as a part of an already scheduled summer course catering to third year architecture students. At this time—as a result of the Taif Agreement of 1989—the country was just coming out of a long period of a taxing civil strife. The Lebanese higher education institutions were re-positioning themselves for commensurately challenging prospects. While a sense of anticipation peaked countrywide, war had left its marks not only on the workings of educational institutions, but also on student alertness. The

Lebanese project partner was instrumental in cementing a rapport between students and the visiting American counterpart.



Figure 7. St. John Cathedral and Baptistery in Byblos, the Lebanon Workshop documentation subject

The objective of this workshop was to offer students a well-rounded experience in heritage structure recoding and drafting through the lens of the hybrid American-Lebanese expertise. The cross-fertilization of ideas on measured surveys between the collaborating instructors was an assumption—and a result—of the workshop initiative. Given the fixed duration of the workshop and the available number of students, the survey subject of St. John Cathedral and Baptistery was the fundamental variable in project design. The characteristics of the survey subject, together with the breadth and depth of survey, were taken into consideration in calibrating the five-day offering of the intended “well-rounded” experience. The size, complexity, and feature accessibility of the edifice were pronounced sub-variables in determining the scope (breadth) and detailing (depth) of the survey and, subsequently, the division of field and studio “labor” among student groups.

The project work was assigned in terms of a building part per student group with the anticipation that: a) each group completes the field recording of its respective part and the studio drafting of that part, and b) all groups coordinate the entire project field and studio work and make necessary adjustment to maintain consistency and accuracy. Students were prompted to use data acquisition approaches as appropriate. These included hand measurement techniques, estimation practices, and photography. The Lebanese partner's proficiency in land surveying was particularly beneficial in obtaining major and inaccessible feature measurements; the US partner's expertise in applying multiple survey methods particularly benefited choosing the appropriate methods to apply for diverse situations.

The project survey and presentation work was assigned as in Table 2.

Group	Assigned Part of Building Subject
1	Building west elevation; Baptistery detailed w. elevation
2	Building north elevation
3	Building floor plan; Interior details
4	Site plan; Site details

Table 2. The building subject assigned parts

Figures 8 through 10 illustrate various outcomes of the project.

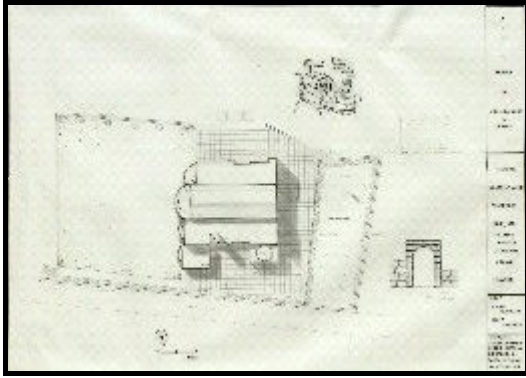


Figure 8. Site plan and details, documented by Group 4

## 5. CONCLUDING OBSERVATIONS

Observations are made below on international collaboration in the area of heritage building documentation as they relate to the author's experience. A culminating reflection is subsequently made on the need for developing collaborative guidelines out of similar experiences by architectural or other faculty.

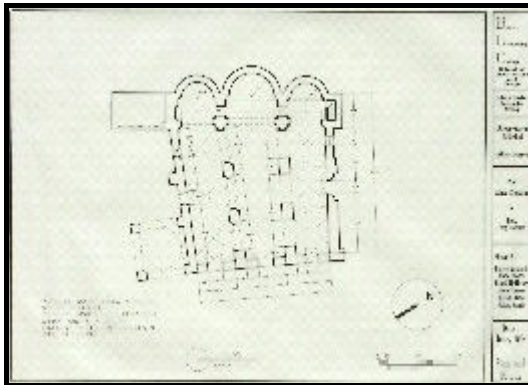


Figure 9. Building Floor Plan, documented by Group 3

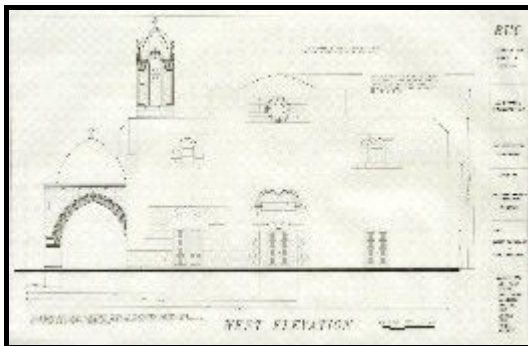


Figure 10: Building West Elevation, documented by Group 1

## 6. SPECIFIC OBSERVATIONS

**Expertise for Collaboration:** The author's US experience was a precursor for the Bahrain Course and the Lebanon Workshop. Established experience is a condition for successful collaboration.

**The Disciplinary Fit:** The documentation undertakings in the three countries were based in architecture programs where field

observation, recoding, and analysis, as well as sketching and drafting are commonplace activities. Architecture programs are fertile grounds for documentation projects, and hence, for international collaboration in documentation and conservation. For other disciplines, documentation projects and ensuing possibilities of international collaboration depend on the nature of the discipline.

**Collaborative Origination:** The Bahrain and Lebanon documentation undertakings originated from the author's personal and international interests. Although similar undertakings may present themselves through diverse vehicles, individual initiative remains crucial and international interest remains favorable in this regard.

**The Host Setting:** The Bahrain Course took place under reasonable political circumstances, without distractions. The Lebanon Workshop took place under an intense political climate and security restrictions, in a period when the country was endeavoring to establish post civil war normality. Although understanding the state of affairs in a prospective host country is expected, collaborative opportunities present themselves even in areas of the world that are deemed unstable.

**Scale of Collaboration:** The semester-long Bahrain Course was accommodated through the author's activities as a supported research/lecturing Fulbright Visiting Scholar to the University of Bahrain for the 2001-2002 academic year. The five-day Lebanon Workshop was accommodated by the author's Summer 1994 trip schedule to the Middle East. The scale of collaboration depends on schedule flexibility and, more importantly, on the degree of support.

## 7. A CULMINATING COMMENT

Individual international collaborative experiences are valuable in their own right, but more importantly, they are valuable for their potential contribution to both academic and professional documentation and conservation community at large. To cultivate their value, some sort of guidelines need to be developed based on broad principles to ultimately help steer documentation and conservation collaborations among institutions and nations. In the academic arena, the intended audience of this paper, the development of such guidelines can derive from diverse considerations surrounding collaborative undertakings. Recognizing that such development is beyond the scope of this paper, salient considerations for guideline development are listed below, with no elaboration:

- Scope and intensity of collaborative projects
- Context of the host country
- Funding and support
- Facilitating agencies
- International organizations

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