

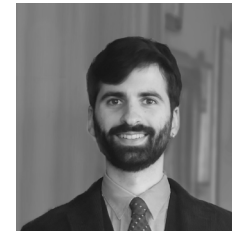
A Methodological Workflow for Cultural Heritage Management. The Case Study of Umbrian Castles

Over time, the definition of cultural heritage has undergone a constant process of evolution, now encompassing all components, both tangible and intangible, that synergistically contribute to the construction of the identity of places and communities. The need to document and preserve intangible cultural heritage also makes it essential to identify standardized methodologies for research and digitalization of cultural heritage. In this context, the visual paradigm, supported by integrated digital technologies, plays a crucial role in the management of cultural heritage. Current strategies for enhancement and communication employ information and communication technologies (ICT) in the processes of technical documentation and knowledge dissemination, offering the possibility to experiment with immersive experiences in digital environments that encourage community involvement in the active preservation of cultural assets, their history, and their

memory. This shared participation in defining the value of heritage culminates in Heritage making, a collective discourse leading to the shared construction of cultural heritage. This article proposes and synthesizes a structured workflow for the management of cultural heritage, starting from the well-established phases of Heritage survey and cataloging and Heritage preservation and enhancement, passing through the process of Heritage presentation and interpretation, to reach community participation in the phase of Heritage making and sharing. The contribution exemplifies the application of the workflow to the case study of fortified architecture in Umbria.



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Keywords:
Cultural Heritage Imagery; Castles; Digital Survey and Cataloguing; Heritage Presentation and Interpretation; Heritage Making and Sharing

CULTURAL HERITAGE AND VISUAL PARADIGM: DEFINITIONS AND STRATEGIC TRENDS

The current definition of cultural heritage introduces a broad and inclusive concept that encompasses all the material and immaterial components contributing to the identity of places and communities [1]. Policies for managing and administering cultural heritage must take this complexity into account and appropriately assess potential actions for preservation and enhancement, establishing targeted strategies tailored to the specific context of the asset under study. While approaches and operational practices for tangible cultural assets are well-established, the relatively recent focus on the intangible component of heritage opens up a debate regarding the codification of standardized methods for investigative research, documentation, preservation, and enhancement. In this context, some recent pilot experiences (Rossi, 2020; Belardi et al., 2022; Bertocci & Cioli, 2023) have contributed to outlining potential methodological approaches developed through the use of integrated digital technologies. Furthermore, the need to establish unified standard procedures for the digitization of both tangible and intangible cultural heritage, capable of effectively recording information about assets while avoiding the risks associated with technological obsolescence, calls upon the entities responsible for heritage management to continuously update their approach and intervention methodologies. This need aligns with the preservation requirements expressed by the digital heritage itself, which is also considered on par with other assets in terms of value and significance (UNESCO, 2003). In the evolving discourse on heritage, attention must be placed on the significant role of the visual paradigm in digitization and communication practices. Preserving, reintegrating, and maintaining a cultural asset within the life of communities involves processes of re-signification, where the asset becomes a carrier of memory and value that regenerate continuously in the present. Re-signification necessarily involves the multiple mental and material

images that each citizen (and consequently, every community) preserve, generate, and nourish. Strategies for enhancing and communicating heritage with the aim of expanding accessibility are now permeated by the integrated use of digital technologies. On one hand, these technologies are the preferred method for the technical documentation of cultural assets for their long-term preservation, on the other hand, they offer an ever-expanding range of educational applications aimed at knowledge transmission and dissemination, including through direct experiential dimensions. Such applications are increasingly tied to the possibilities of use in digital environments and within the contexts of virtual, augmented, extended, and mixed reality (Luigini & Panciroli, 2018; Mandarano, 2019; Brusaporci et al., 2023). The acceleration of heritage studies in recent decades has given rise to practices based on the use of visual content, which present, interpret, and communicate cultural values through experiences and information conveyed in digital environments. The images of heritage that are continually generated add to existing ones, nourishing an ever-evolving imaginary (Salerno, 2023) that plays a decisive role in passing on the history and memory of places and communities to future generations. These images consequently construct imaginaries, influencing our way of seeing and perceiving reality and contributing to the process of attributing meaning to heritage through a progressive layering of meaning that is nurtured and renewed through images themselves. Images of cultural heritage thus establish a dialogic relationship with the heritage itself, its history, memory, and identity, becoming identity components that allow it to remain present, shared, vital, and active.

A CODIFIED WORKFLOW FOR THE MANAGEMENT OF CULTURAL HERITAGE

The previously mentioned definition of cultural heritage represents the culmination of a long and complex linguistic, social, and legal evolution with deep historical roots, as evidenced by documented practices in the Middle Ages and the Renaissance

of cataloging items of artistic value to prevent their dispersion. The outcome of this practice, focused on identifying cultural assets, was the creation of lists of items to be protected, primarily based on their aesthetic and economic value, with the sole purpose of their preservation. During the 19th century, the modern concept of heritage emerged, leading to a collective awareness of its role as a bearer of memory and identity values. In Italy, the first protection codes were drafted, and museums were established, recognized as cataloging and preserving entities. This prompted the need for study, which is inherently linked to historical and artistic heritage knowledge. In Italy, thanks to the emanation of a series of laws in the 20th century (Legge Rava Rosadi n. 364/1909, Legge Croce n. 778/1922, Legge Bottai n. 1089/1939 and n. 1497/1939), the foundations of modern cultural heritage protection were laid, a concept reaffirmed by Article 9 of the Constitution [2]. In this normative panorama, the primary method for identifying assets subject to protection was still listing. It was only with 21st-century legislative approaches (such as Italy's Cultural and Landscape Heritage Code, D.Lgs. 42/2004) that the criteria for recognizing value changed, and the definition of protection evolved into that of enhancement for public enjoyment. This shift in policy implies a greater emphasis on communicative aspects oriented toward collective engagement when shaping conservation and management strategies. The widening perspective from which cultural assets are observed thus leads to an understanding of heritage that encompasses all the components contributing to the construction of the cultural identity of a place or community, in its unique specificities and in respect of its evolutionary character. The conservation, once seen as the main outcome of protection, fundamentally changes and becomes the initial step in a process aimed at achieving widespread and inclusive enjoyment of the asset. The European and international legislative perspective is expressed through the Faro Convention (2005), ratified by Italy in 2020. This convention marks a decisive change in heritage management strategies, promoting a more comprehensive understanding of cultural assets and their relationship with com-

munities and society through the widespread recognition of meanings and values. In this context, the transition from the concept of the right 'of' cultural heritage – the right of assets to be protected and preserved for their value – to the right 'to' cultural heritage – the right of citizens to appropriate heritage – represents a fundamental shift in approach. It views cultural heritage as a subject of active life for every community and society, capable of continuous regeneration through enhancement and enjoyment actions in which it plays a central role. The enrichment of the components defining the identity, history, and memory of places and society is further confirmed by the establishment of specific measures for the protection and enhancement of intangible assets. These measures are based on the Convention for the Safeguarding of the Intangible Cultural Heritage (2003), aimed at protecting the customs, knowledge, and practices that communities recognize as part of their cultural heritage, along with the material objects associated with them. Additionally, the Convention on Diversity of Cultural Expressions (2005) ensures the safeguarding of the specific cultural identities of peoples and social groups by protecting the diversity of artistic creation, production, and distribution of cultural expressions, reinforcing an extremely multifaceted and inclusive concept of cultural heritage.

Within this framework, the practices of documenting and enhancing cultural heritage now systematically involve the use of information and communication technologies (ICT) which are essential not only in the survey and cataloging phase, but also in the subsequent phases of enhancement and interpretation. The widespread consumption of cultural heritage-related content in digital environments, the growing popularity of immersive experiences in virtual contexts, and the inherently visual nature of knowledge transmission to the general public have given rise to a collective and participatory discourse on heritage. This introduces the concept of "heritage making", understood as the shared construction of cultural value.

In light of these considerations, it is possible to describe the sequential stages of a strategic and methodological workflow that exemplifies the

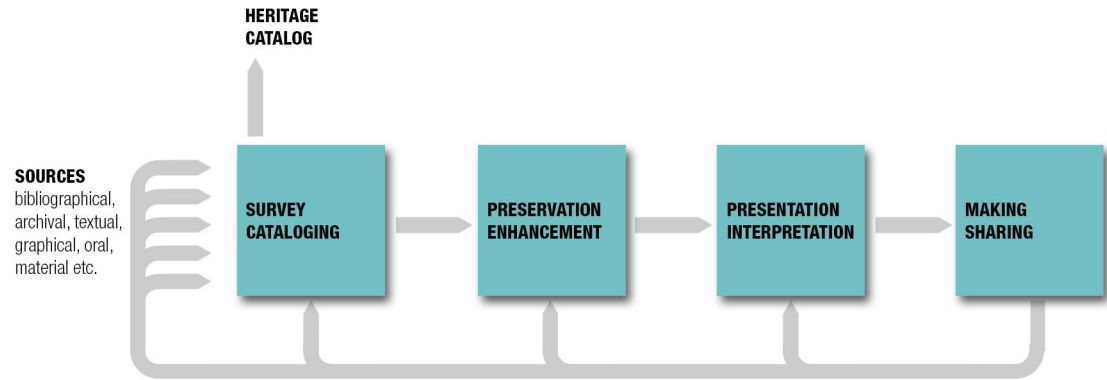


Fig. 1: Strategic/methodological workflow for the management of Cultural Heritage (graphic elaboration by the authors).

management of cultural heritage today, taking into account its renewed definition, the role of ICT in the process, and the interdependence between actions on heritage and the visual paradigm (fig. 1).

Heritage survey and cataloging

At the foundation of determining the value of an asset is its understanding, viewed as the result of a comprehensive study that can synthesize and systematize historical, bibliographic, documentary, technical, and geometric aspects, investigated through the examination of all available sources related to the asset, including oral sources and physical evidence. This phase is conducted according to the methodological approach specific to architectural survey, approached through the integration of direct methods and digital technologies. The collected materials form the knowledge model of the asset under study, which, created in a digital environment, documents its composition through a comprehensive system of diverse information, enabling the initiation of the management process with full awareness of its complex value. The surveyed asset is then compared and integrated with other assets that contribute to the definition of heritage, investigating the complex relationships it establishes with the catalog and, more broadly, exploring its potential connections

with society. The cataloging phase, as defined by the role of the entities responsible for this activity (such as Italy's Central Institute for Catalog and Documentation), allows, on one hand, to establish the prerequisites for preservation and enhancement, and on the other hand, to define the unique values based on which the asset can be communicated and returned to the community.

Heritage preservation and enhancement

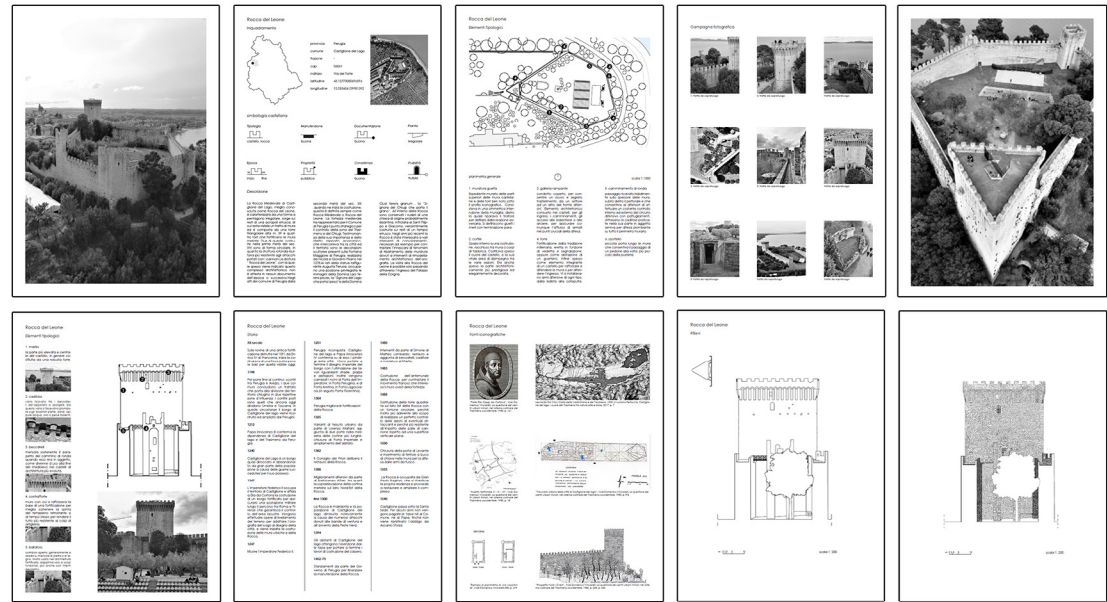
The phase of the material management of the asset, whose long-term preservation and effective role in society must be ensured by strategic policies, involves the formulation of possible actions for protection and enhancement. Both protective actions (aimed at preserving the asset's identity characteristics over time and preventing deterioration or damage) and enhancement actions (intended to promote the asset's value in relation to history and society, to strengthen its identity role, and to encourage widespread awareness) are based on acquired knowledge and are driven by the purpose of ensuring the broadest possible use of the asset by the community. Preservation is never the endpoint of the process but is closely interconnected with the subsequent enhancement phase, sharing with this second phase the ultimate goal of public appropriation of the asset by society and the community.

Heritage presentation and interpretation

The next step involves the communicative management of the asset, through both informative and educational practices, based on the principle that shared knowledge contributes to the sense of belonging of communities to places and the development of new forms of conscious tourism, thereby providing an effective impetus to the material preservation of sites. In this context, the emerging disciplines of heritage presentation, which is defined as a “communication process designed to convey the significance of a heritage site to visitors and local communities in order to increase public awareness, enhance understanding of a heritage site, and acquire public support in the activities directed at its management and preservation” (Shalaginova, 2008), and heritage interpretation, defined as a particular form of communication that aims not so much to transmit information to the public but rather to build connections and relationships between visitors and heritage resources (Brunelli, 2014, p. 147) [3], represent the new areas where practices introduced by digital and ICT make a significant contribution. The emergence of the cultural heritage interpreter, seen as a link between scientific knowledge and heritage education processes, forms the field of exploration for strategies in the management of cultural heritage, closely connected to the goals of building shared knowledge.

Heritage making and sharing

Strategies for the presentation and interpretation of heritage are based on the communication of its identity value. In this context, there is an increasing implementation of citizen science initiatives in which the non-expert public is involved in sharing information and content, fueling a bottom-up construction of knowledge. The citizen becomes an integral part of heritage management strategy, contributing their knowledge to document more consciously and guide decision-making. Digital tools, in particular, are the preferred channels through which participatory co-creation of knowledge is carried out, involving a process of data, information, images, and con-



tent stratification and sedimentation produced by the community, all contributing to the construction of the collective imagery of places. This can be referred to as heritage making, understood as a real process of shared construction of cultural heritage and its value, capable of continuously creating and regenerating cultural heritage while preserving and passing on its history and memory, leading to the formation of heritage communities (Zagato, 2015) – informed and aware social groups actively engaged with heritage.

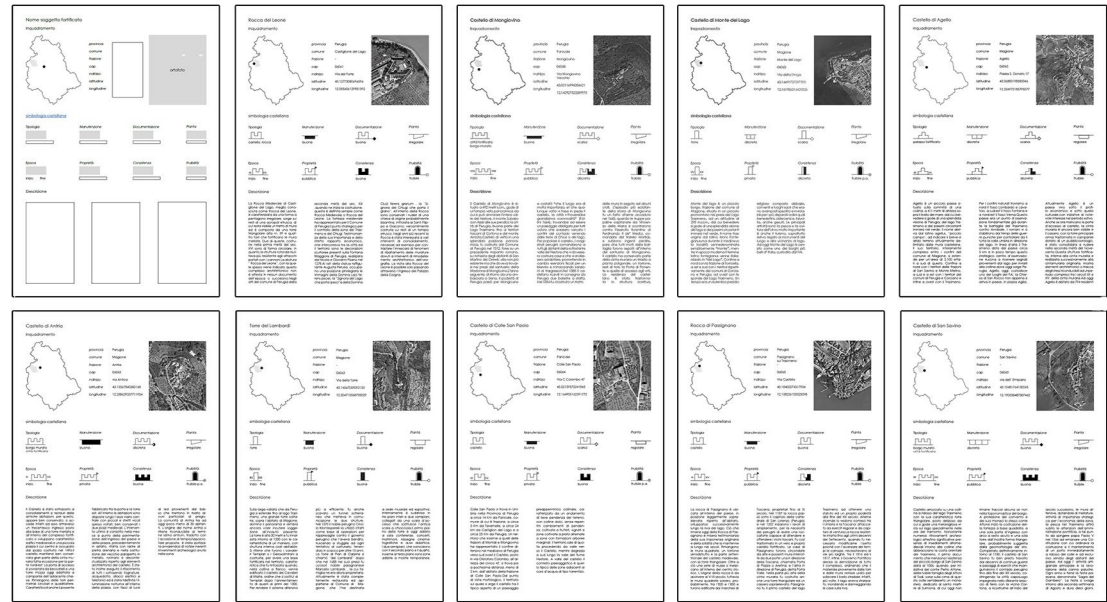
A CASE STUDY IN PROGRESS: THE UMBRIAN CASTLES

The described process, which starts from the knowledge of cultural assets through architectural surveys and is aimed at sharing their identity with a broad audience, has been tested in reference to a particularly significant case study in terms of quantity and significance. This case study comprises fortified buildings scattered throughout the Umbrian territory. The research activity, which is still ongoing at the Department of Civil and Environmental Engineering at the University of Perugia, focuses on Umbrian fortified buildings and is carried out in synergy with the Istituto Italiano dei Castelli and the Umbria Section of the same institute. The Umbrian case is part of a national project to catalog fortified buildings covering the entire country, with the goal of creating a Castles Atlas (www.atlante-castellano.it), an open multimedia resource consisting of standardized catalog cards dedicated to

Fig. 2: C. Spippoli, Cataloging card for the Rocca del Leone, Castiglione del Lago, Perugia, 2022 (original materials by G. Boco, A. Bulletti, M. Mencarelli, C. Tintori).

the detailed description of fortified sites distributed across Italy. The construction of this digital catalog is still in progress, with the current stage of publication featuring an initial basic level of cataloging containing essential information about each site (name, municipality, state of preservation, and location on the map). It will be further enhanced in the future, providing more detailed information on each site.

The experimentation conducted by the research group aligns with this catalog and aims to define a prototype of a more comprehensive catalog card, developable in a digital environment (fig. 2). This prototype, compared to the current cataloging and ICCD cataloging standards, adds the added value of integrating descriptive information with a predominant presence of iconographic material, including historical and contemporary photographic evidence, digitized documents, historical drawings, graphic reconstructions, architectural survey graphics, and 3D digital models. This aspect plays a crucial role in the actual understanding of architectural structures, serving as a reference for both experts, researchers, professionals, and technicians for enhancement and preservation purposes, and for non-expert audiences, citizens, tourists, and enthusiasts for narrative and informative purposes. The proposed catalog card, which may potentially contribute to the implementation of the online Castles Atlas card, aims to create a systematic, coherent, versatile, and inclusive catalog. The prototype includes the classification tools already used by the Italian Institute of Castles, such as “castle symbolism” (*simbologia castellana*), a code of icons summarizing information about the architectural and historical characteristics of fortified structures, and “castle nomenclature” (*nomenclatura castellana*), a glossary of typological elements for the identification and description of fortified architecture. The catalog card then further divides into sections, presenting content with increasing technical detail. The opening section contains general information (geographical coordinates, territorial map, and aerial view) in addition to the classification of the cataloged site according to castle symbolism. Following this are the typological elements

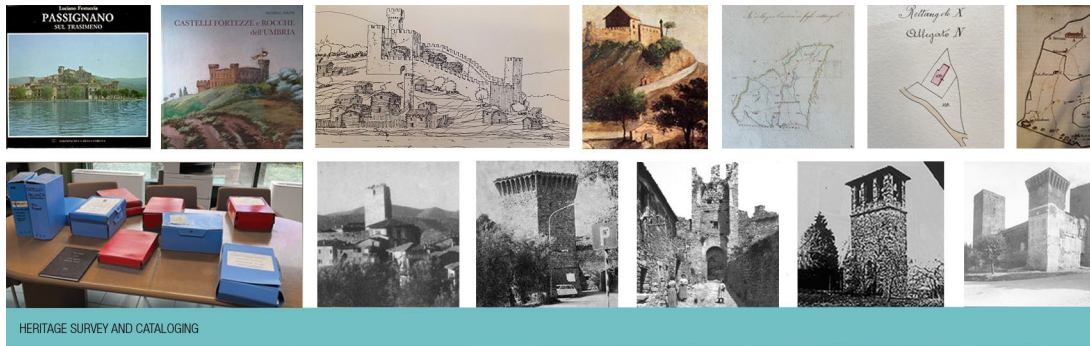


of fortified architecture, indicated in graphic drawings (plan and elevation) according to the castle nomenclature and detailed further with dedicated photographic images. The subsequent sections provide significant historical information organized by key events, reproductions of iconographic sources from documentary analysis (contributing to the construction of the historical memory of the building and enabling a visual comparison of evolutionary phases), and a list of consulted bibliographic and archival sources. The card concludes with an extensive section containing architectural survey graphics.

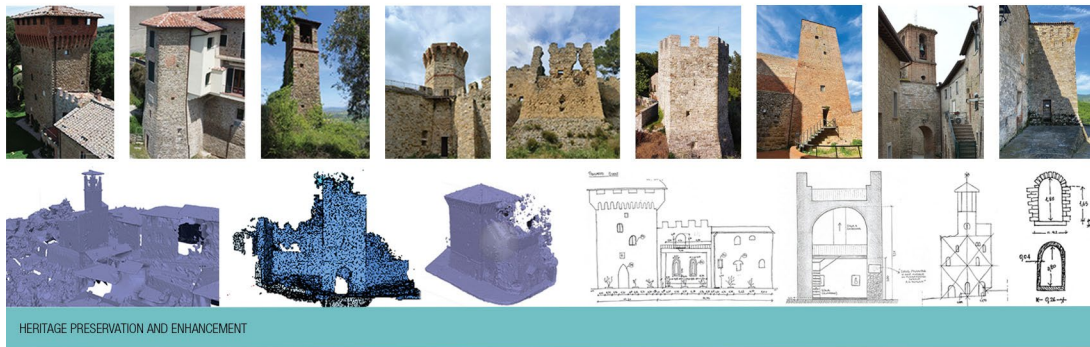
The effectiveness of the catalog card prototype was tested through real case studies conducted during the teaching activity of the “Architectural Survey” course (academic years 2021-2022 and 2022-2023) within the single-cycle master’s degree program in Civil and Architectural Engineering at the University of Perugia (fig. 4). Students were able to simulate the different stages of the methodologi-

cal workflow for managing cultural assets by studying 18 castles, selected based on their belonging to a homogeneous territorial district, that of Lake Trasimeno. The first phase of heritage survey involved collecting and systematizing documentary sources and conducting architectural surveys of entire buildings or significant parts. Then the students produced a new graphic documentation, based on the integration and verification of pre-existing surveys (fig. 5-7). A catalog card, similar to the one previously developed, was created for each of the 18 analyzed buildings, forming the basis of a systematic cataloging (heritage cataloging) of fortified buildings in Umbria (fig. 3). This cataloging approach can potentially be applied in other territorial contexts.

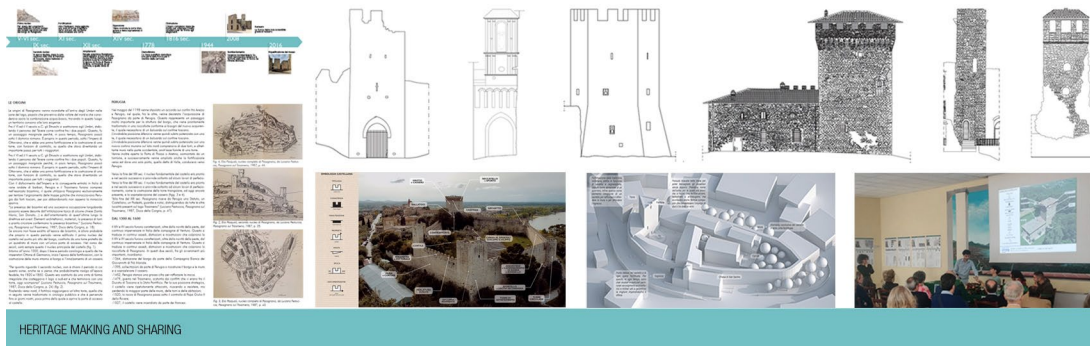
Fig. 3: C. Spippoli, Cataloging cards of nine castles in the province of Perugia, 2022, cover pages. Analyzed castles: Rocca del Leone in Castiglion del Lago, Castle of Mongiovinio, Castle of Monte del Lago, Castle of Agello, Castle of Antria, Torre dei Lambardi in Magione, Castle of Colle San Paolo, Rocca di Passignano sul Trasimeno, Castle of San Savino.



HERITAGE SURVEY AND CATALOGING



HERITAGE PRESERVATION AND ENHANCEMENT



HERITAGE MAKING AND SHARING

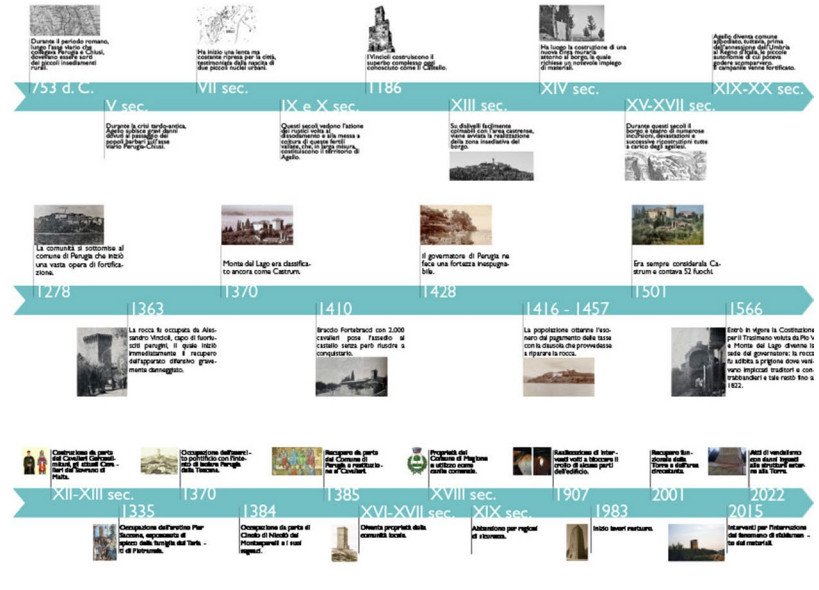
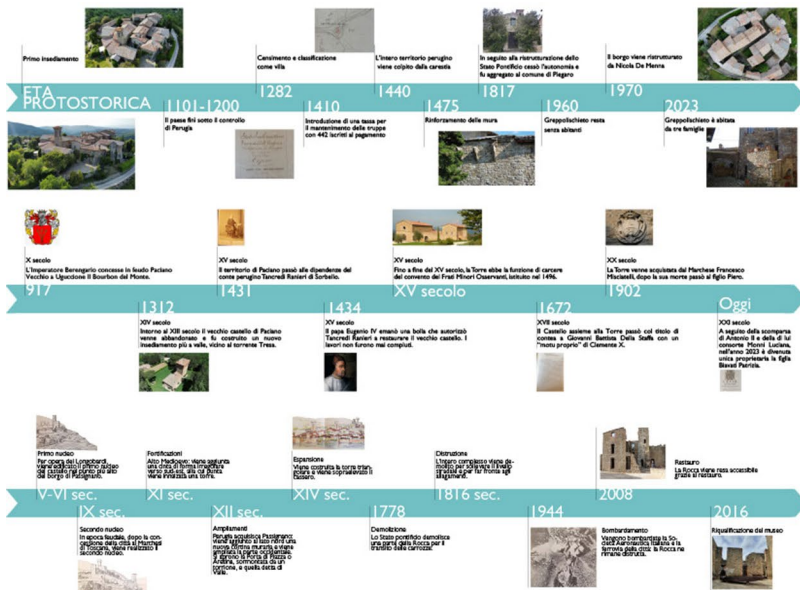
The level of detail in the knowledge-gathering operations, including the identification of material and construction characteristics, allowed the initiation of the second phase of heritage preservation and valorization. This made information available to municipal administrations and competent technical professionals concerning the state of preservation of the studied fortified buildings. Based on this information, it will be possible to initiate design processes aimed at their conservation and protection.

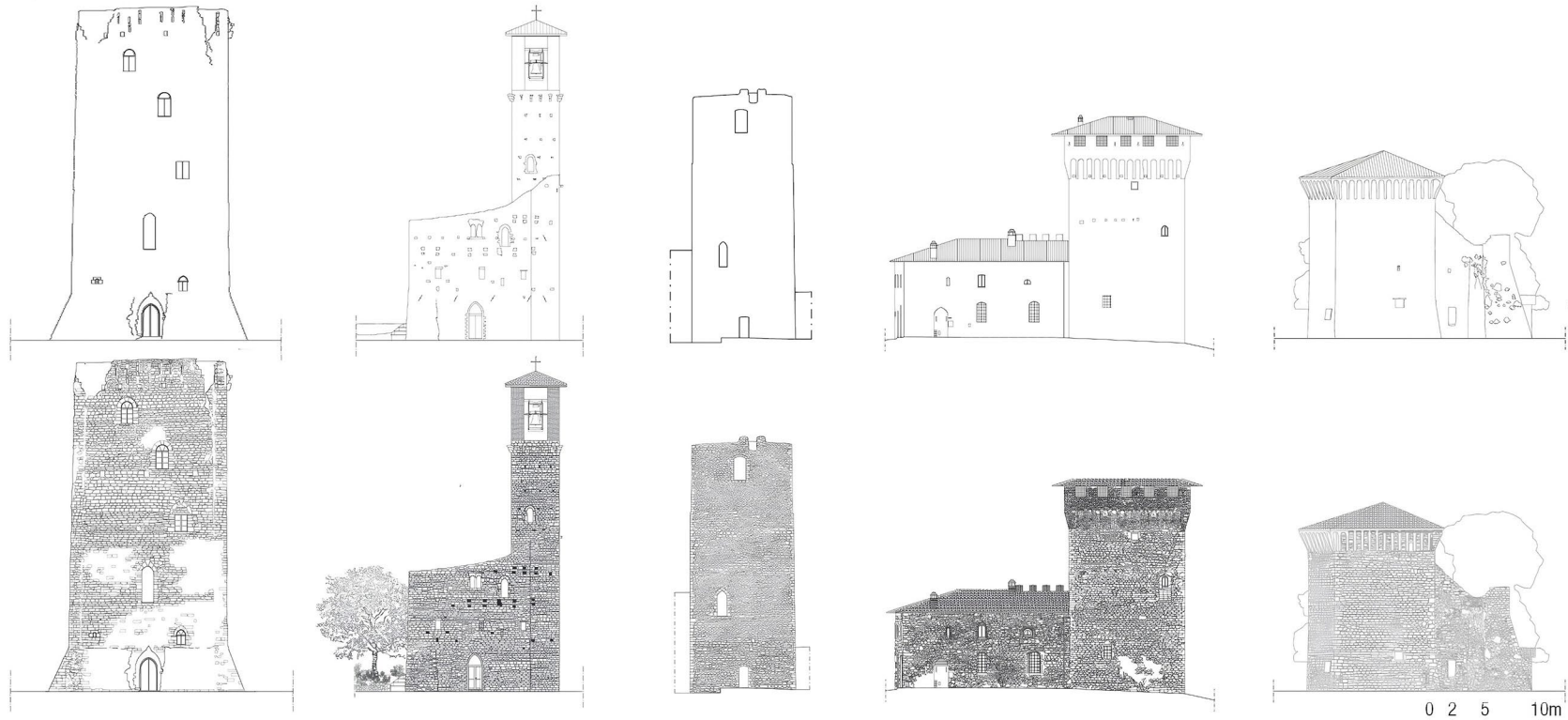
Subsequently, the heritage presentation and interpretation phase was initiated, involving the development and testing of communication, dissemination, and education methods regarding the value of cultural heritage (fig. 4). These were presented to the public on two occasions as part of national events related to National Castle Day (September 24, 2022) and European Heritage Days (September 23, 2023). Both activities were accompanied by exhibitions of the graphic material, providing additional opportunities for the unified and coherent dissemination of knowledge.

Regarding the final stage of the workflow, an initiative that allowed the testing of an initial form of heritage making and sharing involved the collective participation in the Wiki Loves Monuments photo contest, organized by Wikimedia Italy in 2022 and dedicated to fortified architecture. In the Umbrian case, the research group reported over 100 buildings of interest for the contest, encouraging bottom-up participation in documenting, communicating, and regenerating the value of cultural heritage.

The presented research experience thus represents a direct testing opportunity for a process that increasingly involves users with different levels of expertise, diverse needs, and varied objectives. It confirms that the use of ICT, digital environments, and visual content is indispensable for the shared construction of cultural heritage knowledge.

Fig. 4: Heritage management phases experimented during the teaching activity of the "Architectural Survey" course, academic years 2021-2022 and 2022-2023 (professor: Valeria Menchetelli, teaching assistant: Francesco Cotana).





CONCLUSIONS

In a regulatory framework that is now widely outlined by the Ename Charter (2005), the ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites (2008), the establishment of the Interpret Europe association (2009), and the Freiburg Declaration on Heritage Interpretation (2011), it is becoming increasingly clear how the practices of heritage presentation and heritage interpretation are crucial for the preservation of heritage and its continued existence within society, ensured through heritage making and sharing processes. These practices are now widely oriented toward the use of

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[previous page](#)

Fig. 5: Heritage Survey and Cataloging. photogrammetric surveys of six castles in the province of Perugia: Castle of Antria, Castle of Agello, Torre di Orlando in Paciano, Castle of Monte del Lago, Castle of Piegaro, academic years 2021-2022 and 2022-2023.

Fig. 6: Heritage Presentation and Interpretation. Timelines highlighting the most relevant historical events of six castles in the province of Perugia: Castle of Greppolischieto, Castle of Agello, Torre di Orlando in Paciano, Castle of Monte del Lago, Rocca di Passignano sul Trasimeno, Torre dei Lambardi in Magione, academic years 2021-2022 and 2022-2023.

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Fig. 7: Heritage Preservation and Enhancement. Geometrical and materic surveys of six castles in the province of Perugia: Torre dei Lambardi in Magione, Castle of Agello, Castle of San Savino, Torre di Orlando in Paciano, Castle of Monte del Lago, academic years 2021-2022 and 2022-2023.

ICT and digital environments. In Italy as well, initiatives such as the National Plan for the Digitization of Cultural Heritage [2022] and the National Plans for Cultural Heritage Education, consistently developed from 2015 to 2021 (Ministry of Culture, 2019), echo international concerns and leverage digital technologies as tools to enhance citizen engagement. This approach thus emerges as a process in which architectural survey, understood as a profound knowledge-gathering act aimed at recognizing the complex values of cultural assets, marks the beginning of a progressive awareness acquisition process that finds its culmination in the construction and participatory sharing of cultural heritage.

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CREDITS

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NOTES

[1] "Cultural heritage includes artefacts, monuments, a group of buildings and sites, museums that have a diversity of values including symbolic, historic, artistic, aesthetic, ethnological or anthropological, scientific and social significance. It includes tangible heritage (movable, immobile and underwater), intangible cultural heritage (ICH) embedded into cultural, and natural heritage artefacts, sites or monuments. The definition excludes ICH related to other cultural domains such as festivals, celebration etc. It covers industrial heritage and cave paintings." (UNESCO, 2009).

[2] «La Repubblica promuove lo sviluppo della cultura e la ricerca scientifica e tecnica. Tutela il paesaggio e il patrimonio storico e artistico della Nazione.»

[3] "[...] particolare forma di *comunicazione* che mira non tanto a trasmettere informazioni al pubblico quanto piuttosto a costruire *legami e connessioni* tra i visitatori e le risorse del patrimonio" (original italics).

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