

4 Defining, assessing and improving heritage management systems

important considerations, good tips and criteria for assessing and, if necessary, improving a management system, always with the aim of ensuring that it is effective in conserving and managing cultural heritage and, in the case of World Heritage, that it promotes compliance with the requirements of the Convention and the OG. Part 4 further develops many of the crosscutting themes already introduced in Part 2, including heritage values, participatory approaches and sustainability.

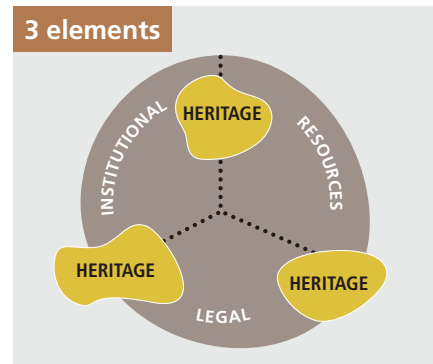
The assessment process will always benefit from documenting properly the heritage management system that is already in place: in Part 4.5, we propose a standard template for this purpose. In the case of World Heritage, the documentation process should be an obligatory step in the nomination process for the property or the group of properties under consideration (OG para 132.5 and Annex 5).³⁷ It should also make it easier to undertake monitoring procedures such as Periodic Reporting.

The purpose of periodically assessing a management system (for example, as in World Heritage Periodic Reporting) is to check that the system continues to perform efficiently and effectively. If changes are required – either to improve the management system or to ensure that it responds to new needs – the assessment will itself influence how any changes will be introduced. How to improve management systems is a constant theme of Part 4, giving particular attention to the roles of management tools and capacity-building (see also Part 3.8, and Appendices A and B).

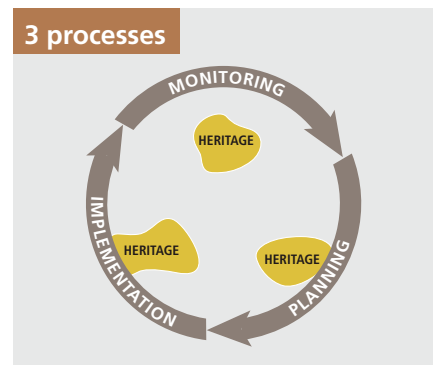
HERITAGE MANAGEMENT SYSTEMS IN GENERAL

Premise

A heritage management system is a framework, often permanent, made up of three important elements: a **legal framework** which defines the reasons for its existence, an **institution** which gives form to its organizational needs and decision-making, and **resources** (human, financial and intellectual) which are used to make it operative.



Together they facilitate the **planning, implementation** and **monitoring** of actions, usually for a single cultural property or a group of properties or an area, to deliver results which guarantee the conservation and management of the properties and their associated values in a sustainable way.



37. An overview of a management system may be independent or form part of a management plan. See Appendix A.