

4 Defining, assessing and improving heritage management systems

What management systems are for

A management system exists to achieve outcomes for the properties in its care and for their stakeholders. In the case of cultural heritage, the principal outcomes are the effective protection of the heritage values of a cultural property or group of properties for present and future generations and the delivery of wider benefits to society.

The management system includes cycles of planning, implementation and monitoring in order to deliver activities addressed to conservation, interpretation and access which often have a broader agenda in mind, such as sustainable use and benefit-sharing. The World Heritage OG highlight specific purposes of management systems relevant to World Heritage properties which are explored further below.

Key considerations for management systems

A management system will be shaped by varying cultural perspectives, by the resources available and by other factors. These may change and may not be aligned with the real needs of the property and its stakeholders. A management system needs to be regularly reviewed and updated to respond to changes to the properties and their setting and to inadequacies and adverse developments within the management system itself.

The following considerations help to explain why a heritage management system needs to be responsive if it is to be effective:

- *Embracing diversity:* Each heritage management system will be, to some extent, unique because of being shaped by the specific needs of the heritage in its care, the cultural context and wider social, economic and environmental factors. In the case of World Heritage, see the *Operational Guidelines* (OG para 110, Part 3.3 of this document).
- *Clarity and coordination:* A management system is cyclical, evaluating its process and achievements so as to adjust its ongoing activities and to inform the next cycle. Interacting with other management systems or their components, it provides a coordinated and effective management outcome with regard to the values of the heritage and, in the case of World Heritage, the OUV.^{39, 40}
- *Risk preparedness:* A management system needs to be sufficiently flexible to deal with unforeseeable events, such as natural disasters or fluctuations in the financial or human resources available to it.
- *A participatory approach:* A shared understanding of the property and its significance by all stakeholders and their involvement in management processes can radically change how the functions of a management system are discharged. It makes heritage processes more responsive and delivers outputs and outcomes that are better aligned with the actual needs of the property and its stakeholders. It also promotes a constructive role for heritage to contribute to society and to sustainable development (see Part 2.3).
- *The role of heritage in sustainable development:* Establishing an active role for heritage in sustainable development delivers numerous reciprocal benefits, enabling the management system to balance different and competing needs more effectively, and to locate new forms of support which are likely to reinforce the heritage values (see Part 2.3).

A responsive management system is more likely to respond to and manage change effectively. It is therefore important to understand how the management system operates (see Parts 4.2 - 4.4), and how it can be clearly described (see Part 4.5). It provides the basis for identifying

39. UNESCO, ICCROM, ICOMOS and IUCN. 2011. *Preparing World Heritage Nominations*. (Second edition). Paris, UNESCO World Heritage Centre. (World Heritage Resource Manual) p.89. <http://whc.unesco.org/en/activities/643/> (English web page).

40. Management planning (see Appendix A) can be a useful tool when a multilateral approach is required so long as the plan has priority or is integrated with other types of plans (e.g. visitor management plans, urban development plans) being used by the organizations involved. Above all, the management plan must be properly integrated into the heritage management system.