

4 Defining, assessing and improving heritage management systems

Financial resources

Financial resources will be either fixed (in terms of source, scope and timing) or variable with different sources (e.g. local, international or traditional sources, or from loans, private funding, international cooperation, specific support for World Heritage properties, sustainable financing, etc.), or a mix of the two.

It has usually been government budgets that provide the financial resources for cultural heritage under public ownership and management, but, as public funding has declined, so funding is being sought from other sources. Thus properties in public ownership take on some of the characteristics of cultural heritage in private ownership – for example, urban sites and cultural landscapes – which seek funding where they can.

Financial resources generated directly from cultural properties are also becoming important in the pursuit of economic sustainability.

Intellectual resources

A wealth of intellectual resources in the form of principles of conservation emerged in the Western world at the end of the 19th century. Resources have continued to evolve as new knowledge from around the world is contributed. The success of conservation or management programmes depends on knowledge being generated, maintained, updated and exchanged, both for day-to-day actions and for improving the management systems and for communicating to existing and new audiences

This needs to be done at numerous levels within the management system through capacity-building (see ‘human resources’ above and Part 3.8), often in the form of research and staff development. Human resources and intellectual resources overlap extensively. Human resources within a management system are important but are not the only generator and host of intellectual resources. Intellectual resources must also be reinforced through internal monitoring and review (see Part 4.3 – Monitoring) and also through external sources drawing upon information management, outsourcing (see Appendix B) and advocacy. Indeed, local experience and know-how can be as precious intellectual resources as the output of national research bodies or international charters (see Part 4.4 – Improvements to management systems). Intellectual resources, like human and financial resources, are often in short supply.

What resources are for

The deployment and manipulation of resources constitutes ‘resourcing’. Resources, as discussed above, fall into three broad categories – human, financial and intellectual – although they can be categorized differently (e.g. as material, technological, equipment, natural or intangible resources).

Sometimes known as ‘inputs’, resources are the ‘fuel’ that make a management system operate to conserve and manage cultural heritage. Their quantity and quality, along with other factors, define the operational capacity of the specific institutional framework. Since resources for cultural heritage are generally scarce, it is all the more critical that they are used effectively (see Part 4.3).

Key considerations for the effective deployment of resources

The following considerations all contribute to the effective deployment of resources for heritage:

- Transparency (regular audits, standard review procedures, quality financial reporting, an open-book approach, where possible, etc.) and accountability (clear distribution of responsibility and communication channels).
- Investing in natural, human and social capital, mirroring the principles of sustainability (see Part 2.3). This depends on a participatory approach with in-house and/or external specialists