

4 Defining, assessing and improving heritage management systems

MONITORING IN GENERAL

Approaches and challenges vary extensively

Heritage monitoring covers many diverse topics in evaluating a management system but they fall into two main areas:

- (i) *The general effectiveness of the management system*: For example, whether administrative objectives are reached, whether processes perform well, whether actions that have been implemented have respected cost, quality and time targets, whether all disciplines are contributing appropriately to decision-making, and whether results and other inputs are feeding back into the system and informing future practice.
- (ii) *The results of the management system*: For example, the state of the site, whether heritage values are being protected, whether there are changes in authenticity and integrity, the environmental conditions, the rate of physical deterioration of the heritage, and the degree of social engagement.

Monitoring processes essentially observe trends. They range from elaborate procedures using technology and interdisciplinary support to simpler, regular, visual checks by property staff or by a member of the local community.

What monitoring involves

Monitoring is about measuring whether the management system is working, whether the state of the cultural heritage is getting better or worse, and whether heritage benefits are being harnessed for society. Though linked, these are two different forms of monitoring – one measures process and the other measures outputs and outcomes – that need to be clearly distinguished and understood by all involved.

Both forms of monitoring are means to positive change, for example:

- Better resources allocation,
- Improving documentation and reporting so as not to be burdensome, time- and resource-consuming activities, and facilitating compliance with reporting processes,
- Allowing management to change, to promote a proactive rather than reactive attitude towards heritage conservation and management,
- Gaining new support from potential donors or partnerships by showing a coherent and credible approach.⁷⁰

Monitoring looks at changes over a given period of time, based on specific indicators. In the case of heritage, the indicators together should show the extent to which the property has preserved those heritage values identified as important. In the case of World Heritage properties, these are reflected in the management plan and section 6 of the nomination format. Of interest here is Appendix 1 of the 2012 Resource Manual *Managing Natural World Heritage* (pp.90-91) since it collates a series of indicators, with notes on possible assessment measures, derived directly from the Periodic Reporting questionnaire and with the aim of answering question 4.8.2 of Section II of the questionnaire: '*Are key indicators for measuring the state of conservation used in monitoring how the Outstanding Universal Value of the property is being maintained?*'.

To constitute 'monitoring', the data measured and collected during implementation must be analysed so that they become information (not merely data), allowing actual results to be compared against expected ones (targets or goals from the 'planning' process). This information, when combined with analysis of similar actions in the past, will make trends legible.

70. Hockings, M., James, R., Stolton, S., Dudley, N., Mathur, V., Makombo, J., Courrau, J. and Parrish, J. 2008. *Enhancing our Heritage Toolkit. Assessing management effectiveness of Natural World Heritage sites*. Paris, UNESCO World Heritage Centre. (World Heritage Papers 23) pp. 88-89.