

Indeed, the term 'monitoring' is often used in the heritage sector to refer to both the *collection* of data and their *analysis* to check the quality or content of specific situations or actions (see 4.4, Result 3: Improvements to management systems, for the identification of areas that need to be revised or adapted).

### Key considerations for monitoring

Monitoring and assessment frameworks and methodologies must respect the diversity of approaches to conservation and management in various regional and cultural contexts. However, the following considerations will be common to many management systems:

#### *Defining purpose*

Monitoring initiatives are useful only if there is an ability to act on the information that they deliver, if they are instigated for a precise reason, and if they feed information back, in a cyclical way, into:

- the other management processes (and indeed monitoring itself) to improve them,
- the broader management system, to inform adjustments to the legal and institutional frameworks, and to improve the manipulation of resources.

In this way, monitoring can help to increase the general performance of the management system and its ability to achieve the most suitable results. Indeed, it is vital to define who and what each monitoring process is aimed at; campaigns can be driven by diverse needs. The following are examples:

- Assessing success and failure of past and current actions and policies,
- Informing future planning and implementation,
- Attracting additional resources,
- Gaining local community consensus for changes at the heritage property,
- Increasing political support for heritage,
- Providing more facilities to the visitors.

However, the systematic monitoring of statistics not directly related to planned work programmes (outputs) or broader management objectives (outcomes) can sometimes provide useful information for mapping future trends as objectives for the property change. For example, visitor numbers are not usually an identified output (unless a particular number of visitors is desired) or a product of direct management action, but monitoring changes in visitor numbers will give some indication of the demands placed on management. Similarly, establishing how far visitors have travelled may assist in assessing community costs and benefits arising from the property. Developing some systematic trend monitoring can thus be part of establishing an effective information management system for a property. As far as possible, this should be tied into Periodic Reporting requirements.

#### *Objective and reliable data*

Where possible, monitoring should be carried out using a systematic methodology to reduce subjectivity as much as possible and employing people with the right disciplinary expertise. Data gathering and measurement approaches will depend on the type of process to be observed but must permit comparison and be repeatable over time. Data could be in the form of photos, videos, measured drawings, interviews, written reports, etc. Observations should be compared with a specific state of conservation defined in the past (i.e. a baseline). Useful material on the state of conservation in the past will be available from the original World Heritage nomination dossier and Advisory Body evaluation.<sup>71</sup>

71. Boccardi, G. 2004. 'Improving Monitoring for World Heritage Conservation', in: Stovel, H. (ed). 2004. *Monitoring World Heritage*, Paris, UNESCO World Heritage Centre. (World Heritage Papers 10) p.39.