MONITORING
A MANAGEMENT TOOL for
CONSERVATION of
BUILT HERITAGE
Monitoring related activities in a given calendar year follow a well established schedule that takes into account in situ visits, feedback, partnership, desk studies, reviews, cross checking and reporting.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Month</th>
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<tbody>
<tr>
<td>Monitoring report or other reports of previous year sent to state parties</td>
<td>Jan</td>
</tr>
<tr>
<td>Desk studies on the sites to be monitored during year(s)</td>
<td>Feb</td>
</tr>
<tr>
<td>Fact sheets produced for each one of the sites</td>
<td>Mar</td>
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<tr>
<td>Compilation of material and data from ICOMOS and IUCN / ICCROM</td>
<td>Apr</td>
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<tr>
<td>Regional expert meetings to review methodology and staffing</td>
<td>May</td>
</tr>
<tr>
<td>Determination of staffing for each mission (national and/or international)</td>
<td>June</td>
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<tr>
<td>Presentation of Progress Report</td>
<td>July</td>
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<tr>
<td>Field monitoring missions</td>
<td>Aug</td>
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<tr>
<td>Comments from state parties</td>
<td>Sept</td>
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<tr>
<td>Presentation of Final Reports</td>
<td>Oct</td>
</tr>
<tr>
<td>Monitoring report corresponding to a given period to be distributed to State Parties</td>
<td>Nov</td>
</tr>
<tr>
<td></td>
<td>Dec</td>
</tr>
</tbody>
</table>
A. Basic Facts on the Site
   A.1. Site
   A.2. State Party - Country
   A.3. Data at the time of inscription
   A.4. Previous monitoring report(s), if any, national and/ or international
   A.5. Technical assistance provided by the United Nations System and others bilateral, NGO’s, etc., prior to monitoring

5.1 World Heritage Fund Contributions
5.2 UNESCO International Campaigns (if any)
5.3 UNDP National and/or Regional Projects and others, if any

B. State of Conservation
   B.1. Physical State of Conservation (authenticity, previous restorations, reconstructions, technical and scientific aspects, etc.)
   B.2. Spatial/visual perception of the site’s conservation, presence of incongruous elements and visual unity. (See Annex II)

C. Factors of Relevance to the State of Conservation
   C.1. Socio-economic factors
   C.2. Environmental matters
   C.3. Disaster preparedness and natural disasters
   C.4. Site visitation and tourism impact assessment

D. Legal and Institutional Framework
   D.1. Legal framework
       1.1. At national level
       1.2. At local and regional level
       1.3. Relations between 1.1. and 1.2.
   D.2. Institutional framework
       2.1. At national level
       2.2. At local and regional level
       2.3. Relations between 2.1. and 2.2.
       2.4. In situ local/national monitoring systems in place, if any

E. Human Resources Capacity in Conservation and Allied Subjects
   E.1. Human resources available
       1.1 At national level
       1.2. At local and regional level
       1.3 At site level
   E.2. Training facilities available, including in situ and new needs in conservation
   E.3. Training needs to establish monitoring systems at national and site levels

F. Local Programmes in Place
   F.1. Policies, programmes and projects for the safeguard of the site
   F.2. Financial means, budgets and funding institutions

G. Conservation Management Policy/Tools

H. Funding Sources and Mechanisms, Public Private PPP’s

I. Disaster Preparedness

J. Environmental Concerns and Environmental Protection

K. Assessment of Site Visitation and Tourism Policies and Programmes

L. Observations and Findings

M. Conclusions and Recommendations
   Suggested future action at all levels (highlights of previous points including role of the World Heritage Centre and the relevant sectors of UNESCO. e.g. Cultural Heritage. Sciences, Education, the Environment), ICOMOS, ICCROM, IUCN, etc. At this occasion some guidelines could also be drawn in reference to the design of integral conservation projects in context of sustainable human development and/or the environment. Special emphasis should also be given to follow-up action in the form of technical assistance, training, emergency aid from the World Heritage Centre and other sources, NGO’s, private sector.
METHODOLOGY FOR SYSTEMATIC MONITORING (prepared by S. Mutal and team)

STEP 1

DYNAMIC PROCESS OF METHODOLOGY

STEP 2

INFO COLLECT.

DESK STUDIES

STEP 3

INFO COLLECT.

SITE VISITS

(IF NECESSARY)

STEP 4

PRELIM. INTERIM

REPORT

STEP 5

ACTUAL SITE VISIT

STEP 6

PREP. FINAL REPORT

STEP 7

STEP 8

STEP 9

COMPARATIVE ANALYSIS INCLUDING ACTIVITIES TO BE PROGRAMMED AND UNDERTAKEN

EXECUTIVE SUMMARY

COMMENTS FROM STATE PARTIES AND PRESENTATION TO WHC

EVALUATION AND REVISION OF METHODOLOGY

NEW CYCLE BEGINS

DEVELOPMENT EVOLUTIONARY AND PARTICIPATORY

METHODOLOGY DEVELOPMENT REVIEWED AT THE END OF EACH CYCLE

SITE

SITE

SITE

SITES

INFO COLLECT.

PREP. FINAL REPORT

ACTUAL SITE VISIT

PRELIM. INTERIM REPORT

INFO COLLECT.

SITE VISITS (IF NECESSARY)

DESK STUDIES

INFO COLLECT.

PREP. FINAL REPORT

ACTUAL SITE VISIT

PRELIM. INTERIM REPORT

INFO COLLECT.

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ACTUAL SITE VISIT

PRELIM. INTERIM REPORT

INFO COLLECT.

SITE VISITS (IF NECESSARY)

DESK STUDIES
THE MONITORING OF CULTURAL AND MIXED WORLD HERITAGE SITES REQUIRES A MULTIDIMENSIONAL SET OF APPROACHES SUCH AS:

<table>
<thead>
<tr>
<th>Regional Considerations</th>
<th>In Situ Conservation and Management Practices</th>
<th>Built-in-Training Elements in Conducting the Monitoring Exercise</th>
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</thead>
<tbody>
<tr>
<td>Environment and Conservation</td>
<td>Socio Economic Considerations</td>
<td>Partnership with Governments</td>
</tr>
<tr>
<td>Continuity and Change</td>
<td>Adaptability to Site Characteristics and Typology</td>
<td>Involvement of Local Personnel</td>
</tr>
<tr>
<td>Relationship with Sustainable Human Development</td>
<td>State Party Accountability</td>
<td>Of Major Service and Cooperation To/With State Party</td>
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<tr>
<td>Reporting Process: At State Party Level With a Fluid and Dynamic Information Network to Follow Up Actions at All Levels</td>
<td>Reporting Process: Advisory Bodies Such As ICCROM / ICOMOS / IUCN</td>
<td>Reporting Process: Professional Organizations, Universities and Conservation Centres</td>
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</table>
SUMMARY

A. BASIC FACTS ON THE SITE

B. STATE OF CONSERVATION

C. FACTORS OF RELEVANCE TO THE STATE OF CONSERVATION

D. LEGAL AND INSTITUTIONAL FRAMEWORK

E. HUMAN RESOURCES CAPACITY IN CONSERVATION AND ALLIED SUBJECTS

F. LOCAL PROGRAMMES IN PLACE

G. CONSERVATION MANAGEMENT

M. CONCLUSIONS AND RECOMMENDATIONS

L. OBSERVATIONS AND FINDINGS

K. ASSESSMENT OF SITE VISITATION AND TOURISM POLICIES AND PROGRAMMES

J. ENVIRONMENTAL CONCERNS AND ENVIRONMENTAL PROTECTION

I. DISASTER PREPAREDNESS NATURAL DISASTERS

H. FUNDING SOURCES AND MECHANISMS

M. ASSESSMENT OF SITE VISITATION AND TOURISM POLICIES AND PROGRAMMES
TECHNICAL ASSISTANCE REQUESTS TO THE WORLD HERITAGE CENTRE SHOULD BY PREFERENCE, SYSTEMATICALLY CONFORM WITH THE RECOMMENDATIONS RESULTING FROM THE MONITORING EXERCISES OR PERIODIC REPORTS

1. TECHNICAL COOPERATION REQUEST FROM STATE PARTY

2. CHECKS CONFORMITY

3. APPROVAL BY CHAIRPERSON OF BUREAU AND/OR COMMITTEE

WORLD HERITAGE CENTRE

IN COORDINATION WITH APPROPRIATE SECTORS OF UNESCO, NGO’S AND ADVISORY GROUPS E.G. ICCROM, ICOMOS, IUCN

RECOMMENDATIONS FROM MONITORING EXERCISE
THE MONITORING EXERCISE HAS “SIDE EFFECTS’ IN VARIOUS AREAS:

- Promotion of World Heritage Convention
- Institutional Memory at the National and Local Level as well as for WHC
- Identification of needs for complementary and coordination of technical assistance and funding efforts
- Training at both regional and global levels
- Inclusion of monitoring as a subject matter in training courses
- Sharing of local conservation practices
- Strengthening of institutional and professional linkages with national and regional conservation centres
- General human resources development
- Past experience needs to be integrated when planning future monitoring exercises
SPECIAL TRAINING COURSES ON SITE MANAGEMENT

LET INTERNATIONAL CONVENTION BE KNOWN BETTER AT NATIONAL LEVEL

SPECIAL REGIONAL COURSES ON MONITORING

ESTABLISH IF POSSIBLE A GLOBAL HERITAGE FACILITY TYPE OF FUND AT NATIONAL LEVEL

SHARING OF MONITORING EXPERIENCE AND TECHNIQUES AMONG DEVELOPING COUNTRIES

WORLDWIDE SHARING OF CONSERVATION PRACTICE EXPERIENCE

RECOMMENDATIONS FOR FUTURE EXERCISES

FOLLOW RECOMMENDATIONS OF 5 YEAR REPORTS ON AN ANNUAL BASIS

HAVE "M" (MONITORING) EVERY 5 - 8 YEARS

LET STATE PARTIES HAVE "M" IN PLACE

SPECIAL REGIONAL COURSES ON MONITORING

CONSIDER SAME METHODOLOGY WITH ADAPTED APPROACH ACCORDING TO GEOGRAPHICAL AREA

ASSESS FUTURE INSCRIPTIONS AND ASSISTANCE ON THE BASIS OF MONITORING EXERCISE RESULTS

INCORPORATING "MONITORING" AS A SUBJECT MATTER IN TRAINING COURSES

IDENTIFY FOCAL POINTS AND CONTACTS WITH STATE PARTIES

USING EXISTING NATIONAL/REGIONAL INFRASTRUCTURE

ESTABLISH REGIONAL ROSTERS OF EXPERTS