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, FEED BACK, PARTNERSHIP, DESK STUDIES, REVIEWS, CROSS CHECKING AND REPORTING.

		JAN FEB MAR APR MAY JUNE JULY AUG SEPT OCT NOV DEC
Monitoring report or other reports of previous year sent out to state parties	1	<u>1</u>
Desk studies on the sites to be monitored during year(s)	2	2
Fact sheets produced for each one of the sites	3	3
Compilation of material and data from ICOMOS and IUCN / ICCROM	4	4
Regional expert meetings to review methodology and staffing	5	5
Determination of staffing for each mission (national and/or international)	6	<u>6</u> →
Presentation of Progress Report	7	7
Field monitoring missions	8	8
Comments from state parties	9	9
Presentation of Final Reports	10	10
Monitoring report corresponding to a given period to be distributed to State Parties	11	<u>11</u>

MONITORING METHODOLOGY AND QUESTIONNAIRE (TO BE REVISED REGULARLY)

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

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

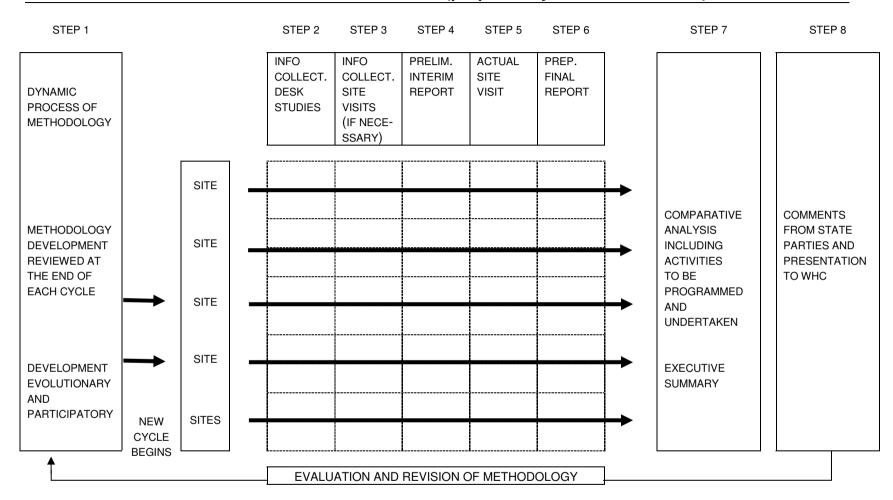
- F.1. Policies, programmes and projects for the safeguard of the site
- F.2. Financial means, budgets and funding institutions
- G. Conservation Management Policy/Tools
- H. Funding Sources and Mechanisms, Public Private PPP's
- I. Disaster Preparedness
- J. Environmental Concerns and Environmental 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.

E. Human Resources Capacity in

METHODOLOGY FOR SYSTEMATIC MONITORING (prepared by S. Mutal and team)



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

REGIONAL CONSIDERATIONS

IN SITU CONSERVATION AND MANAGEMENT PRACTICES

BUILT-IN-TRAINING ELEMENTS IN CONDUCTING THE MONITORING EXERCISE

ENVIRONMENT AND CONSERVATION

SOCIO ECONOMIC CONSIDERATIONS

PARTNERSHIP WITH GOVERNMENTS

CONTINUITY AND CHANGE

ADAPTABILITY TO SITE CHARACTERISTICS AND TYPOLOGY

INVOLVEMENT OF LOCAL PERSONNEL

RELATIONSHIP WITH SUSTAINABLE HUMAN DEVELOPMENT

STATE PARTY ACCOUNTABILITY

OF MAJOR SERVICE AND COOPERATION TO/WITH STATE PARTY

REPORTING PROCESS: AT STATE
PARTY LEVEL WITH A FLUID
AND DYNAMIC INFORMATION
NETWORK TO FOLLOW UP
ACTIONS AT ALL LEVELS

REPORTING PROCESS: ADVISORY BODIES SUCH AS ICCROM / ICOMOS / IUCN REPORTING PROCESS:
PROFESSIONAL ORGANIZATIONS,
UNIVERSITIES AND
CONSERVATION CENTRES

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 MONITORING

G. CONSERVATION MANAGEMENT

M. CONCLUSIONS AND RECOMMENDATIONS

L. OBSERVATIONS AND FINDINGS

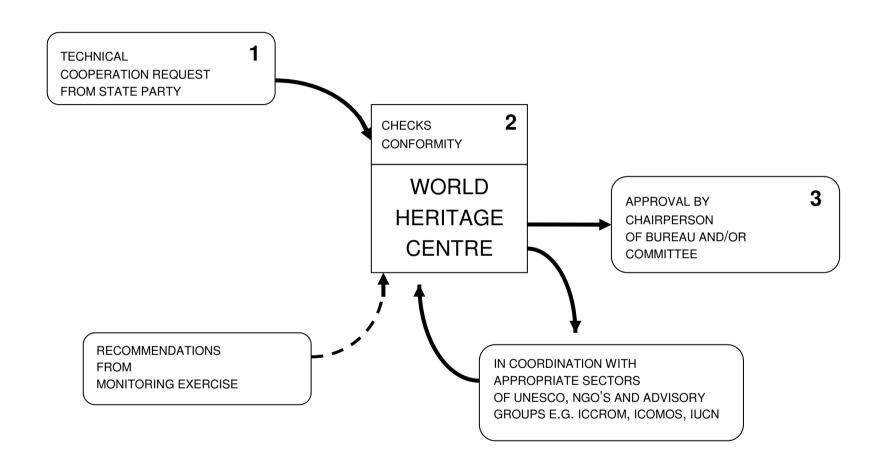
K. ASSESSMENT OF SITE VISITATION AND TOURISM POLICIES AND PROGRAMMES

J. ENVIRONMENTAL CONCERNS AND ENVIRONMENTAL PROTECTION

I. DISASTER PREPAREDNESS NATURAL DISASTERS

> H. FUNDING SOURCES AND MECHANISMS

TECHNICAL ASSISTANCE REQUESTS TO THE WORLD HERITAGE CENTRE SHOULD BY PREFERENCE, SYSTEMATICALLY CONFORM WITH THE RECOMMENDATIONS RESULTING FROM THE MONITORING EXERCISES OR PERIODIC REPORTS



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

SHARING OF LOCAL CONSERVATION PRACTICES

MONITORING EXERCISE OUTPUT TRAINING AT BOTH REGIONAL AND GLOBAL LEVELS

INCLUSION OF MONITORING
AS A SUBJECT MATTER
IN TRAINING COURSES

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

FOLLOW RECOMMENDATIONS OF 5 YEAR REPORTS ON AN ANNUAL BASIS

HAVE "M" (MONITORING) EVERY 5 - 8 YEARS LET STATE PARTIES HAVE
"M" IN PLACE

LET INTERNATIONAL CONVENTION BE KNOWN BETTER AT NATIONAL LEVEL

SPECIAL **TRAINING COURSES**ON SITE MANAGEMENT

SPECIAL REGIONAL COURSES
ON MONITORING

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

CONSIDER SAME METHODOLOGY
WITH ADAPTED APPROACH ACCORDING
TO GEOGRAPHICAL AREA

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

SHARING OF MONITORING EXPERIENCE AND TECHNIQUES AMONG DEVELOPING COUNTRIES

WORLDWIDE SHARING
OF CONSERVATION PRACTICE
EXPERIENCE

RECOMMENDATIONS

FOR FUTURE EXERCISES

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