



HERITY

**International Organization
for Quality Management
of Cultural Heritage**

NGO

www.herity.org - herity@dri.it



Why?

Cultural Heritage needs care. Specialists need support to take care of it. Citizens and visitors can be a formidable ally in protecting Cultural Heritage so that contemporary and future generations can enjoy it.

Cultural Heritage is then a common responsibility.

Who?

HERITY was launched in 1994 thanks to the effort made by specialists in different fields (cultural heritage management, total quality management, specific disciplines such as archaeology, architecture, arts, museology, law studies, anthropology, conservation and restoration, communication, tourism) from 27 Countries.



What?

The main result of this effort is the HERITY Global Evaluation System (HGES), which is used to certify the state-of-the art of the quality management of Monuments, Sites, Museums, Libraries and Archives.

How?

HERITY International is based in Italy. National Commissions are launched day by day in the world for localization and enrichment of the effort, thanks to the contribution of local representatives.

HERITY is developing its policy through the diffusion of the HGES as well as specific programs known as "Universities of HERITY", "Cities of HERITY", "Schools of HERITY", "Crossing the boundaries" and the "intellectual support program".

This KIT is aimed to know details.



The HERITY Certification

HERITY (from **HERITAGE** + **QUALITY**) is the International Organization for Quality Management of Cultural Heritage. Beginning in 1994, HERITY has been testing its principles up until 1998 when they were adopted. Only after some years, in 2002, was it decided that the moment had arrived to codify this know-how by setting criteria, parameters, prerequisites and indicators. At that time, HERITY also developed instruments for its mission: to inform the public on the state-of-the-art of a site, a museum, monument, library or archive with regard to its perceived Value, Conservation status, Communication capabilities and Services, at the same time assisting those responsible to better manage the assets they are in charge of. Then the results from the field-work were analyzed and the process was codified. At that point it was possible also to design a training strategy.

Today, HERITY is working in several places, particularly in Italy which was the first Pilot Country in 2004 to experiment the HGES (HERITY Global Evaluation System). The main set of questions and problems to be answered came from the observation of visitor behavior in Rome, as an example of an Art City characterized by cultural vestiges and activities as well as by significant tourism pressure. At present, the HERITY system makes it possible for cultural assets all over the world to be certified.

In fact, the HGES allows specialists to better understand the variables which influence the three key-questions they normally have to face:

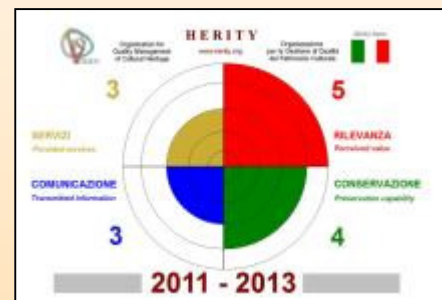
- Avoiding low visitor numbers at Cultural Heritage sites;
- Reducing the impact;
- Managing the balance.

The Target

To describe the situation of a Cultural Asset, HERITY chose its main criteria starting from the point of view of the public, both residents and the tourists: which factors would convince a person to appreciate, visit, possibly come back to a site and/or advise other people to go there?

They can be summarized as:

- 1- "This place is important to visit";
- 2- "It is well preserved and maintained";
- 3- "I understood its message";
- 4- "I had the opportunity to better appreciate the visit thanks to its facilities".



To make it possible to understand the situation of a site in a glance, HERITY created a symbol which describes on a scale from one to five the level of Value, Conservation, Communication and Services, called the "Target". The HERITY Target makes it possible to compare different situations, allowing the public to choose which place is better to visit *according to their own needs/convictions* and different levels of interest in each criterion. For this, every place has a chance, independent of its reputation.

The results illustrated in the Target (which are those of the certification) combine the opinion of managers, HERITY specialists, the public and other stakeholders, reflecting different points of view and directly involving several interested parties.



How it works

The HGES is the process to obtain the HERITY certification, which is valid for three years. It is based on the study of different perceptions and data, at different levels.

The main sources are:

- 1- The property and the managers of the cultural asset examined;
- 2- The HERITY specialists;
- 3- The public and other stakeholders (e.g.: sponsors, controlling institutions, professionals).

The process starts with a self-evaluation made by the property and the managers. In fact, nobody can know the specific situation better than themselves, and the daily victories and defeats encountered. To this information the opinion of a Team of HERITY specialists composed by three people (two at the moment of the renewal) who have skills in Conservation, Quality and the specific field of the asset examined (e.g.: an archaeologist) is added. Their opinion is based on documentation and, above all, on a survey which is made on-site with the help of the managers. This is a good occasion to discuss topics of common interest too. To these sources of data the perception of the public is added as well as the point of view of other stakeholders. The global impression is enriched by audits made by HERITY, including, if necessary, the involvement of "ghost consumers".

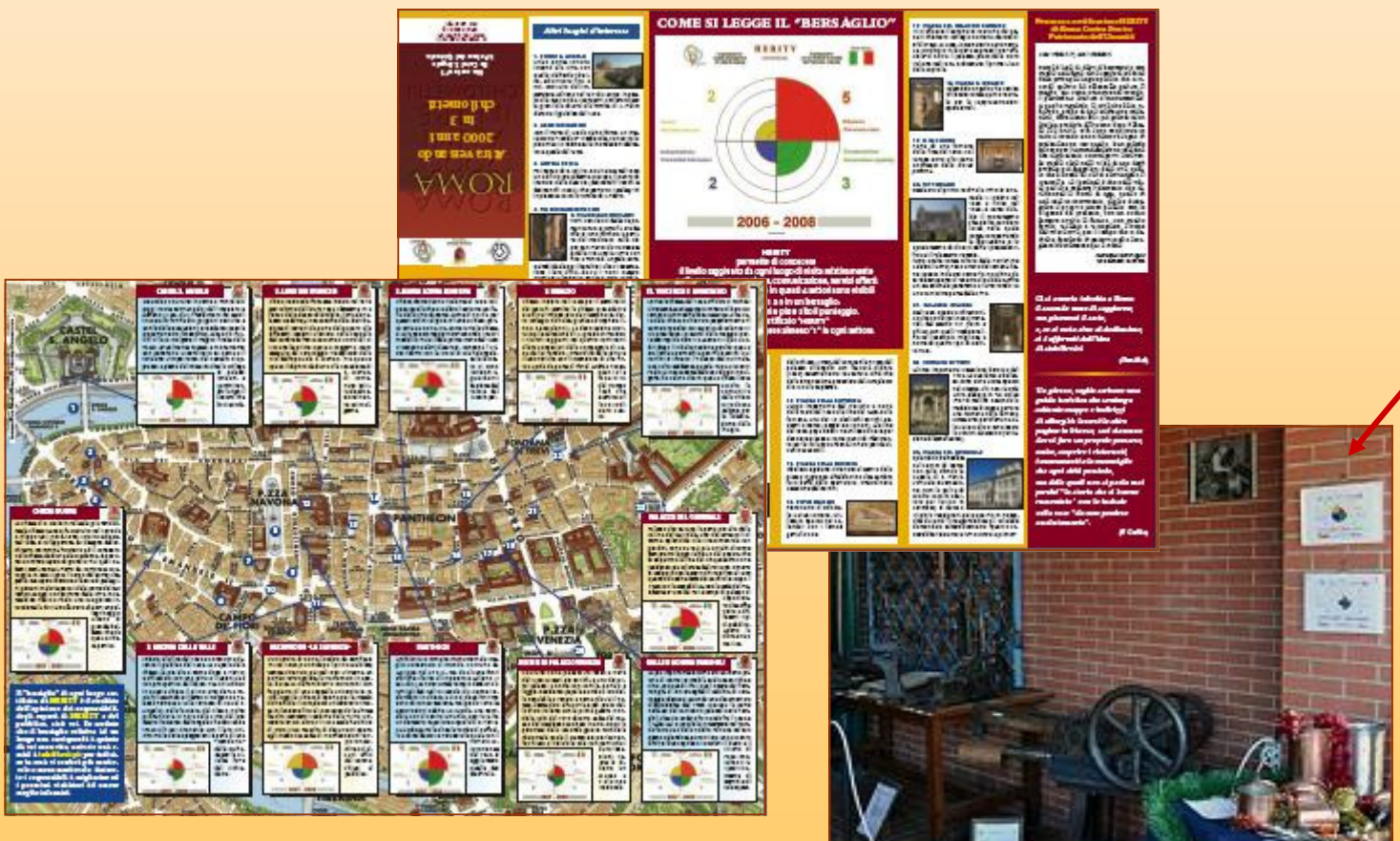
The duration of the certification is three months to one year. All the information is collected by HERITY and restituted after elaboration to those who asked for the certification, together with some instruments and documentation produced for them to use. At the end of the process a certificate, a report and a plaque with the resulting Target are given.

The HERITY Target, which results correspond to the certificate, is attached in the form of a plaque and shown to the public at the entrance of the site.

Brief information about the site and the report are utilized internally and sometimes on the Internet as may be decided by those who requested the certification.

The electronic image of the target is used to produce tickets, folders, leaflets, etc. All the necessary files are provided by HERITY.

Information to Tour Operators and the visitors normally given by public or private agencies can integrate the Target and be organized in the form of maps, add-ons to catalogues and symbols for guides and other publications.





Results

The HGES started to be applied in Italy in 2004. Since then, Italy has had 30 Ecomuseums and 3 National Monuments in Piedmont, 12 monuments in the Historical Center of Rome (including the Pantheon, the Presidential Palace, Castel S. Angelo and S. Luigi dei Francesi) and 5 museums (including the Capitolini), 43 museums in Latium certified in three years as well as other ongoing in Sardinia, Tuscany, Campania and other regions bringing to a total of 200 sites in the first five years.

A few time later the system was launched and applied in Spain, Portugal, Brazil, while the dialogue with other Countries (in particular, Bahrein, Canada, Chile, Croatia, Cuba, Czech Republic, Dominican Republic, France, Greece, Hungary, Iran, Latvia, Libya, Lithuania, Malta, Oman, Peru, Romania, Saudi Arabia, Senegal, South Africa, Sri Lanka, Sweden, Turkey, United Arab Emirates, United Kingdom, United States of America, Taiwan, The Netherlands, The Vatican, Yemen, Uzbekistan) was enforced by the International Committee in the same span of time, both for the application of the system and the launching of National Commissions.

On August 24, 2004 official contacts with the UNESCO World Heritage Center were started, followed by technical meetings in 2004 and 2005 to spread the system at World Heritage Sites. After this, the Director of the World Heritage Center declared *"HERITY's analyses on the management quality of the World Heritage Sites are an important contribution to the setting and assessment of the national and local conservation policies and to the improvement of the services offered to the public"*. In 2006 the first results of the HGES at these sites were presented to 160 delegates from different Countries at the 30th World Heritage Committee.



The First International HERITY Conference in 2006 marked a further milestone in the cooperation between HERITY and Intergovernmental Organizations. As a result, in addition to the UNESCO-WHC partnership in 2008 those with the World Tourism Organization and the ICCROM were defined.

On the occasion of the first renewal a survey was carried out at the 30 Italian ecomuseums which first applied the HGES in 2004 with the following results:

- 72% of the site managers believe HERITY helps to offer better services;
- 61% of the public better appreciated visits thanks to HERITY information;
- 42% of the stakeholders used HERITY results for decisions' support.



Related Projects

In addition to the application of the HGES HERITY also undertakes other activities in order to spread the awareness of the importance of Quality Management in Cultural Heritage.

Currently the following related projects have been launched:

- The *HERITY Universities* program, which is aimed at meeting future requirements of specialists and increasing the quality of the Cultural Heritage Management teaching under a defined and recognized Label;
- The *HERITY Schools* program, which is aimed at encouraging primary and high schools students to look at Cultural Heritage as a common responsibility while improving students' critical skills;
- The *HERITY Cities* program, reserved to those places where the HGES system was applied on a large-scale basis in their territory and which want to take advantage of this through specific campaigns;
- The *HERITY Intellectual support* program, which involves recognized people from very different fields in supporting the scope of HERITY through their intellectual contribution;
- The *HERITY Sponsorship* program which makes it possible to enforce and enlarge the activities of HERITY with personalized technical, financial or communication agreements made with companies and other private entities which, in turn, can receive practical and image benefits on the basis of a transparent policy;
- The *HERITY Public Advocacy* program is aimed at launching special events to involve the public and keep people's attention high regarding Cultural Heritage issues.

The collective experience with the HGES, constantly updated to meet new needs, also makes it possible to identify new fields where its application would be useful for the various stakeholders such as the study of new trends in Cultural Heritage Management. These programs, labeled *Crossing the Boundaries*, are developed in cooperation with international bodies like UNESCO-WHC and the UN-WTO as well as interested public and private research centers and institutions.

As an example, the following research lines have been designed:

- Applying the HGES in Historic Centers as a whole;
- Applying the HGES to cultural landscapes;
- Use of the HGES at a cultural asset in the planning and project phases;
- Scenarios for tourism in the Art Cities in the next 50 years;
- HGES certification of virtual sites;
- Applying the HGES to Immaterial Heritage;
- Social implications of the HGES in risk areas and extreme situations.

Why do we need a new model and a new type of assessment?

We have the ISO 9000 standards and certification. We have the TQM models and assessments (e.g. EFQM, Malcolm Baldrige, Deming). We have customer oriented models and assessments ('Michelin like').

Each model fits its own purpose, but they are not so well suited for the assessment of Cultural Heritage.

In fact the HGES is based on the assumption that in the field of Cultural Heritage is a multipurpose model which better meets the needs of the plurality of actors involved. The HGES makes it possible to combine the advantages of existing models, because the qualification/certification of Cultural Heritage sites is a problem of extraordinary importance. Just extrapolating existing assessment models to the Cultural Heritage area would be a "by default" approach that does not optimise results. So, the HGES model has been built on the experience gained from existing models as a multi-perspective, multi-aimed system resulting in:

- A plurality of perspectives (self-assessment by the site managers; evaluation by visitors; evaluation by an external team of experts);
- A plurality of aims (information for potential visitors; information for site management; information for stakeholders-direction).



Advantages

1. the HERITY target is an improvement of previous classifications based on only one criterion. And because it is visual, it is easily recognized at an international level;
2. HERITY classification is periodically reviewed and is neither "fixed" or unchangeable as in other previous systems;
3. HERITY recognition encourages continuous improvement of conservation, communication and services;
4. awarding of HERITY certification stimulates competitiveness in a sector that has always been "blurred";
5. the evaluation system allows for independent information similar to other international standards.

Many interested parties can take advantage of the HERITY Global Evaluation System:

- Site managers to highlight their efforts and to know how other interested parties perceive their asset;
- Politicians to understand the situation at a glance for decision-making;
- Tour Operators to know the situation of cultural sites for designing their itineraries;
- Public agencies to inform travellers;
- Properties to plan budgets and to promote the sites;
- Banks and other stakeholders to verify the real improvement made possible by their financial support;
- Publishers of guides to enrich their offer to customers.

These are the steps which are normally considered as the standard process to start HERITY and the HGES in a new Country:

1. Institutional contacts between HERITY International and the Country Authorities;
2. Expression of interest by the Country Authorities at an official level;
3. Organization of a local meeting by the Country Authorities in order to directly illustrate and discuss the HERITY system and its results with interested parties, as well as to agree to the terms of implementation;
4. Proposal of Pilot Sites by the Country Authorities;
5. Preparation of a technical proposal by HERITY International;
6. Funding;
7. Assessment of Pilot Sites and introduction of local observers by HERITY International;
8. Identification of a partner (e.g. an NGO or Foundation) where the National Commission for HERITY could be based;
9. Establishing a National Commission for HERITY;
10. Follow-up (including training).

Please, note that after steps 3, 5 and 7 it is possible to stop the process if the Authorities believe that the situation is not favorable to continue.

If the HGES is already utilized in your Country and you are interested in implementing the HGES evaluation at your site, please apply directly for the certification by contacting HERITY International (or the National Commission if it exists) officially asking for a technical proposal indicating the name, extension, location and type of the assets you want to be certified (please, verify in advance that the project was realized at least at 20% of the total and that the assets are open to the public).



**Cultural Heritage
is the collective memory of Humankind**

Cultural Heritage is a non renewable resource

**Quality Management of Cultural Heritage
should be oriented to its preservation,
in the context of sustainable development**

