



**Briefing:**

**Enhancing Our Heritage Toolkit 2.0**

Assessing Management Effectiveness of World Heritage Properties and Other Heritage Places

- UNESCO and the Advisory Bodies to the World Heritage Committee (ICCROM, ICOMOS & IUCN), have issued a revised toolkit to help assess management effectiveness at World Heritage properties and other heritage places: ***Enhancing our Heritage Toolkit 2.0*** <https://whc.unesco.org/en/eoh20/>
- This Toolkit is the latest in a series of World Heritage Resource Manuals. It is an updated edition of the *Enhancing Our Heritage Toolkit* (2008) developed in partnership with the IUCN World Commission on Protected Areas.
- It offers a self-assessment methodology to identify how well a World Heritage property or other heritage place is being managed. It is designed to support managers<sup>1</sup> in identifying ways to improve conservation practices, management process and resource allocation, particularly if used before reviewing or updating management plans.
- The assessment methodology is tailored to all types of natural and cultural heritage places. It is a fully self-assessed methodology, without need for external support, validation or information sharing.
- The resource manual provides guidance on how to undertake the self-assessment, in addition to sharing the self-assessment tools.
- The Toolkit guides managers through a four-phase collaborative process for designing and carrying out an assessment of management effectiveness. It is organised around a set 12 tools that each look at critical elements of management systems. The tools can be used separately or collectively to identify and respond to current management challenges.
- The tools are accompanied by assessment worksheets, in the form of either a template to help users compile information, or a questionnaire to help users identify opportunities and actions. The worksheets are adaptable to specific needs and situations.

The Toolkit is structured as follows:

- **Section 1** introduces 'management effectiveness assessments' and explains how the EOH 2.0 methodology differs from other similar tools and methodologies for conducting management assessments.

---

<sup>1</sup> In this context, managers refers to “actors with legal or customary authority and/or recognized responsibilities for managing all or part of the heritage place. Furthermore, rights-holders with socially recognized responsibilities for managing the heritage place, or heritage resources within the place, should also be considered as ‘managers’.” (UNESCO et al., 2023, 17)



- **Section 2** introduces the 12 tools around which the Toolkit is organised. It also offers guidance on how to adapt use of the Toolkit to suit individual situations, and about when to use the Toolkit to maximise its usefulness.
- **Section 3** details who should be involved in the assessment process, and roles and responsibilities. It describes the key concepts that those participating in the assessment should understand to ensure that it can be undertaken as a collaborative process.
- **Section 4** presents the four main phases of the procedure for undertaking a management effectiveness assessment: preparing, gathering information, implementing, and reporting and acting.
- **Section 5** is the primary section explaining how to use the guidance in practice. This section guides managers through the 12 assessment tools. Each tool has an associated worksheet for managers to complete. For each tool, section 5 describes the objectives, the type of information and analysis required and the specific tasks to be completed. It also includes a set of 'reflection questions' designed to help managers analyse critical issues, draw conclusions and identify what actions are needed.

The 12 EOH 2.0 assessment tools are:

- **Tool 1 Values, attributes and management objectives**  
Assesses the understanding and identification of the values of the heritage place, and whether existing management objectives are appropriate to guide the management system.
- **Tool 2 Factors affecting the property**  
Assesses whether factors that affect, or could potentially affect, the heritage place are understood and documented. It also analyses the adequateness of management measures for the identified factors.
- **Tool 3 Boundaries, buffer zones and the wider setting**  
Assesses the adequacy of the boundaries, size and configuration of the heritage place, as well as the interactions between the property, its buffer zone and wider setting.
- **Tool 4 Governance arrangements**  
Assesses if the roles and responsibilities of different managers are clearly defined, whether there is effective coordination between them, and the level of engagement of rights-holders in the management of the heritage place.
- **Tool 5 Legal, regulatory and customary framework**  
Assesses how policies, legislation, customary practices and other legal and regulatory instruments are used to manage the heritage place.
- **Tool 6 Management planning framework**



Provides an overview of the effectiveness of the planning framework and assesses the adequacy of the management plan or other main planning instrument used to guide management.

- **Tool 7 Needs and inputs**  
Assesses if current human capacity and financial, material and technological resources are adequate to effectively manage the property or other heritage place.
- **Tool 8 Management processes**  
Assesses the appropriateness of management processes by examining if there are policies and procedures in place to ensure that processes are implemented according to good practices and desired standards.
- **Tool 9 Implementation of management measures**  
Assesses progress in implementing the management plan, subsidiary plans, and relevant work programmes.
- **Tool 10 Outputs – Monitoring productivity**  
Assesses the delivery of outputs resulting from the implementation of planned actions, routine work and management processes, as a measure of the productivity of the management system.
- **Tool 11 Outcomes – Monitoring the state of conservation**  
Examines whether monitoring programmes are adequate to assess the state of conservation of the property and if its values are being maintained. This will help managers understand whether the OUV and other values of the property are being maintained, and whether the management objectives are being achieved.
- **Tool 12 Review of management effectiveness assessment findings**  
Summarizes the findings of the assessment and helps to prioritize future follow-up actions in response to gaps and challenges that the assessment has helped to identify in the management system.