

## Developing a Checklist for Evaluating the Interpretation and Presentation programs at Cultural Heritage Sites

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### Abstract

Interpretation/presentation programs offered at cultural heritage sites (CHSs) make a major contribution to conservation. It is important to know how successful such efforts are. However, the literature emphasizes that interpretation/presentation effort at CHSs lack scientific evaluation criteria. CHS managers require an effective and reliable evaluation tool. The International Council on Monuments and Sites (ICOMOS) Charter for the Interpretation and Presentation of CHSs – widely known as the ‘Ename Charter’ – defines seven fundamental principles for the interpretation/presentation of CHSs in heritage conservation efforts, which could underpin an evaluation tool. This paper develops a checklist for evaluating interpretation/presentation program effectiveness based on ICOMOS principles designed to contribute to sustainable CHS conservation. Through qualitative content analysis of the ICOMOS Charter, a checklist to evaluate the effectiveness of CHS interpretation/presentation programs in its conservation was developed to help CHS evaluators and managers. Consensus on the checklist was developed through a Delphi study with heritage professionals.

**Keywords:** cultural heritage site (CHS); Delphi study; International Council on Monuments and Sites (ICOMOS); interpretation; presentation.

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### Introduction

#### ICOMOS Charter on the Interpretation and Presentation of Cultural Heritage Sites (CHSs)

The International Council on Monuments and Sites (ICOMOS) and its International Scientific Committee on the Interpretation and Presentation of Cultural Heritage Sites (ICOMOS-ICIP) highlighted the need to develop guidelines for assessing interpretation at a CHS in collaboration with other related heritage interpretation organizations (ICOMOS-ICIP, 2006), including: the International Council of Museums (ICOM); the National Association for Interpretation (NAI) in the United States; the

Association for Heritage Interpretation (AHI) in the United Kingdom; the International Union for Conservation of Nature (IUCN); CIPA – one of the International Scientific Committee of ICOMOS; The European Network of Excellence on the Applications of Information and Communication Technology to Cultural Heritage (EPOCH); the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM); and UNESCO World Heritage Centre (WHC).

In this context, the ICOMOS Charter (2008) – ratified by the 16th General Assembly of ICOMOS – identified seven primary principles of Interpretation and Presentation as a means of enhancing public understanding of, and satisfaction with, CHSs and, in turn, as crucial components of heritage conservation efforts, including: I) Access and Understanding; II) Information Sources; III) Attention to Setting and Context; IV) Preservation of Authenticity; V) Planning for Sustainability; VI) Concern for Inclusiveness; VII) Importance of Research, Training, and Evaluation (Silberman, 2008).

Although ICOMOS Charter supports managers' ability to enhance public understanding of a CHS by adopting its principles, research is needed to develop a tool for evaluation. Evaluators would use this tool to direct site managers to meet international standards and take appropriate and effective decisions in interpreting/presenting his/her site.

### **Overlapping terms: The Inseparability of CHS Interpretation and Presentation**

In its final report, the ICOMOS '*Ename Charter*' sets separate definitions for the 'Interpretation' and 'Presentation' of CHSs. Interpretation: '*... refers to the full range of potential activities intended to heighten public awareness and enhance understanding of cultural heritage site[s]. These can include print and electronic publications, public lectures, on-site and directly related off-site installations, educational programs, community activities, and ongoing research, training, and evaluation of the interpretation process itself*' (Silberman, 2008:4). ICOMOS defines 'presentation' as: '*the carefully planned communication of interpretive content through the arrangement of interpretive information, physical access, and interpretive infrastructure at a cultural heritage site. It can be conveyed through a variety of technical means, including, yet not requiring, such elements as informational panels, museum-type displays, formalized walking tours, lectures and guided tours, and multimedia applications and websites*' (Silberman, 2008:4). Hence, while interpretation is all about planned activities for the public, presentation indicates how site management plans communicate the interpretive

content of these activities to the public. So, the pivotal distinction between the two terms is that presentation represents the medium through which interpretation – as the content – is communicated.

In this regard, communication competency is an important factor that can help interpreters to present cultural heritage properly (Ryan and Dewar, 1995). Also, all types of digital heritage such as websites and social media represent excellent means to communicate CHSs and especially museums to increase participation and engagement (Bonacchi, 2017).

However, there is considerable overlap between these definitions. This is clear when comparing what each definition includes, for instance, ‘interpretive information’ should be properly ‘arranged’ in the ‘printed and electronic publication’. Likewise, ‘interpretive infrastructure’ includes ‘on-site and related off-site installations’ and encompass ‘informational panels’, ‘museum-type displays’, ‘museum interactive’, ‘museum games’ and ‘multimedia applications’. Also, ‘educational programs’ may include ‘guided tours’. ‘Lectures’ are mentioned in both definitions. The overlap makes it difficult to define each term separately.

This was reflected also in the literature that reveals that the terms ‘interpretation’ and ‘presentation’ of CHSs are often used interchangeably and are seen by many to be synonymous. Some scholars and international organizations (e.g. Al-Busaidi, 2010; Aldridge, 1975; AHI, 2014; Brochu and Merriman, 2002; Moscardo, 1998; Prentice, 1996; Stewart *et al.*, 1998; Tilden, 1977; Uzzell, 1989) employ the term ‘interpretation’ to include both interpretation and presentation of a heritage site.

The main difference between these terms is that presentation is a ‘*one-way process of communication*’ whereas interpretation is an interactive process (ICOMOS-ICIP, 2006:3). In a word, building categories and indicators to evaluate interpretation/presentation efforts out of the ICOMOS definitions of interpretation and presentation of CHS need to consider this overlap and the inseparability of interpretation and presentation.

### **Research Aim**

This paper uses qualitative content analysis to first discuss the development of a tool to evaluate interpretation/presentation efforts in the form of a comprehensive checklist. It develops scientific criteria to benchmark practice and achieve sustainable conservation starting from more fundamental technical aspects up to the topmost interpretive quality ones. Then, it employs the Delphi analysis to achieve consensus with heritage professionals on it and its implementation. Towards developing this evaluation tool, ICOMOS principles were used as criteria of evaluation and a basis for indicators development. Therefore, a

breakdown of the criteria into categories then into indicators is the desired outcome from the literature analysis.

### **Materials and Methods**

The ICOMOS Charter for the Interpretation and Presentation of CHSs (2008) and its seven principles were analyzed to provide the underpinning for the development of a checklist based on ICOMOS principles for evaluating the effectiveness of interpretation and presentation programs for CHS conservation. The checklist provides a benchmark for the evaluation of CHS interpretation and presentation programs by heritage professionals and supports CHS managers in meeting international standards in relation to the interpretation and presentation of CHSs.

In this paper, a Delphi study, which is generally used to achieve consensus among experts and/or gain judgment on complex matters, was conducted. It comprised three stages: initial; core; final (Sobaih, Ritchie, and Jones, 2012) (see figure 1).

#### **Initial stage: the development of a draft checklist**

In this stage, qualitative analysis of the ICOMOS Charter for the Interpretation and Presentation resulted in the development of a draft checklist. The seven ICOMOS Charter principles were used as evaluation criteria. The written text of the ICOMOS Charter - including the principles and their explanation, and relevant literature, were systematically analyzed - using content analysis (Weber, 1990) - to build up valid inferences/indicators for the draft checklist.

The words and phrases from the ICOMOS principles were categorized into indicators which were classified under the evaluation criteria (table 1). Weber (1990) emphasized that inferences must be consistent to be valid; therefore, three researchers independently analyzed the same text and extracted indicators. To keep the draft checklist as concise as possible, similar or repeated indicators were eliminated. Although the checklist was inspired and based primarily on the *Ename* Charter in terms of its structure and its indicators, other ideas were incorporated from the literature.

**Table 1: Content analyses emerging categories and indicators**

<b>Evaluation Criteria</b>	<b>Categories</b>	<b>Indicators</b>
Criterion 1: Access and Understanding	4	21
Criterion 2: Information Sources	3	7
Criterion 3: Attention to Setting and Context	1	6
Criterion 4: Preservation of Authenticity	2	8
Criterion 5: Planning for Sustainability	3	14
Criterion 6: Concern for Inclusiveness	1	13
Criterion 7: Importance of Research, Training and Evaluation	3	15

### **Heritage expert selection criteria**

The initial stage of this Delphi study not only identified the major evaluation indicators and prepared documentation to be sent to the heritage experts, but also identified members of the international scientific committee of ICOMOS (ICIP) as the experts for the Delphi panel because ICOMOS, and its International Scientific Committee, is the body who issued the *Ename* charter and highlighted the need to develop guidelines for assessing interpretation at a CHS in 2008. Moreover, ICOMOS committee members are qualified in the field of archaeology, site planning and engineering, conservation, architecture, management of heritage sites, art historian or archivist. Therefore, they represent the best to be selected as professionals for this study.

### **Response rate**

The principal author sent the draft checklist and a signed letter by email to the ICOMOS-ICIP chair encouraging ICOMOS-ICIP members to take part in this study. Although 100 current members of the ICOMOS-ICIP committee in 2016 were invited to participate, only 33 members responded. They proved willing/enthusiastic to participate in the Delphi process and communicated effectively with the researchers and the wider professional networks in which they were involved. Although the response rate was low (33%), the feedback and discussion were extremely thorough and critical. Especially that the demography of respondents is heterogeneous and include participants from all parts of the globe; 8 from USA, 6 from Australia, 3 from the United Kingdom, 2 from Germany, 2 from Belgium, 3 from Pakistan, 1 from Greece, 1 from Italy, 1 from Spain, 2 from Mexico, 2 from Turkey, 1 from Venezuela, and 1 from Croatia. Therefore, resultant checklist is not dominated by western values or by Eurocentric approach of understanding world heritage (see Acheson, 2017).

### Core stage: Achieving consensus on the draft checklist

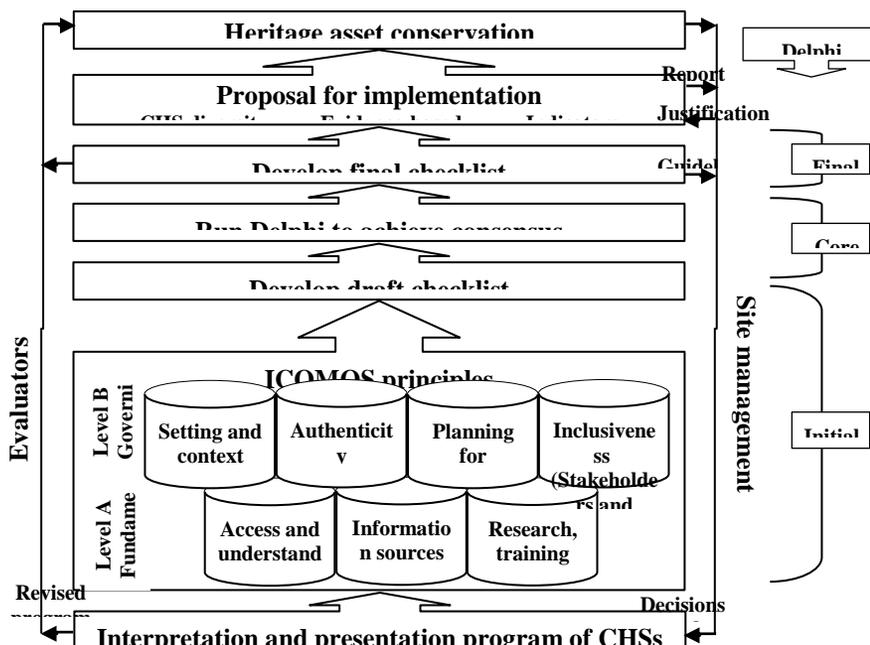
This stage aimed to achieve consensus on the draft checklist. The heritage experts were asked to thoroughly read the draft checklist, insert their comments electronically using the 'track changes' function of their word processor and return them to the researchers. The methodology they followed to achieve the target varied; some commented on the checklist drawing on their wide experience and field work in interpretation/presentation projects. Others compared the categories and indicators to the initial ICOMOS Charter and proposed their comments accordingly.

The responses were analyzed to reflect on the draft checklist. Corrective actions were then taken to amend it accordingly and a revised checklist based on the comments was circulated to the experts again with a covering letter from the primary author. This process was iterated twice until consensus was achieved.

### Final stage: Reporting

In the final stage, a final checklist was reported. The following framework (Figure 1) summarizes the process of developing consensus on the evaluation checklist for the interpretation/presentation programs and a proposal for its implementation towards achieving the conservation of CHSs based on ICOMOS Principles.

**Figure 1: Overview of the process of developing consensus on a checklist to evaluate the interpretation and presentation programs of CHSs**



## Theory

### Interpretation and Conservation of CHSs

The 1<sup>st</sup> article of the UNESCO's 1972 Convention for the Protection of the World Cultural and Natural Heritage, defined cultural heritage site (CHS) as: '*works of man or the combined works of nature and of man, and areas including archaeological sites which are of outstanding universal value from the historical, aesthetic, ethnological or anthropological points of view*' (UNESCO, 1972: article 1). Jokilehto (2006) considers this convention the most important document in the field of heritage protection and he discussed the '*outstanding universal value*' and the way to achieve heritage conservation through authenticity and integrity. In this context, interpretation and presentation efforts at a CHS have a variety of functions, amongst which the conservation of heritage resources is particularly important (Huang, Lee, and Chan, 2005; ICOMOS-ICIP, 2006; Jacobs and Harms, 2014; Little and McManamon, 2005; McKercher, Ho, and Cros, 2005; Meskell, 2013; Ong, Ryan, and McIntosh, 2014; Silberman, 2008; Torre, 2014; Wijeratne, et al., 2014). Also, they foster '*restoring the identities and memories of local communities, enabling people to once again recognize who they are*' (Kalman, 2017:551). This includes also, small-scale cultural heritage sites, which may not receive large numbers of tourists, still provide both socio-economic benefits and sense of belonging for local communities and; therefore, inform about the past to future generations. They still should be conserved and properly interpreted and presented (Grimwade and Carter, 2000).

According to archaeologists, 'interpretation' was created by the tourism industry for visitors to heritage sites (Jewell, 2005). Heritage has been exploited by interpreters probably from around 460 B.C, or even earlier, when freelance guides become available at the Pyramids of Egypt (Dewar, 2000). In this context, 'archaeo-tourism', 'cultural tourism' and 'heritage tourism' are used interchangeably in the literature to indicate heritage-based tourism for which the archaeological landscape is a core-motivation (Ashworth and Tunbridge, 2000; Hughes, 2002; Richards, 2001). According to Kalman (2017:548), interpretation is explained as a '*form of mitigation*' of cultural heritage site as it tells the related stories to imply several meanings.

However, interpretation as one manifestation of touristic utilization of archaeological sites, and other heritage assets, provokes a serious dilemma; heritage site managers face a difficult choice between conserving a heritage resource and opening it up to tourists which will inevitably result in damage to the site unless appropriately managed

(Little and McManamon, 2005; McKercher, Ho and Cros, 2005). Site managers must ensure that touristic utilization complements heritage conservation through interpretation. Consequently, one goal of 'interpretation' should be to support the conservation of heritage resources (Aldridge, 1975; Silberman, 2008) alongside other goals, including achieving visitor satisfaction and fostering values-based management and its role in heritage conservation (Torre, 2014). This was emphasized by UNESCO's 1972 Convention for the Protection of the World Cultural and Natural Heritage which is considered a major watershed in the conservation of the world's heritage (Jokilehto, 2006; Meskell, 2013; Vigneron, 2017). Moreover, it is now clear that interpretation is crucial to changing visitor behaviors and intentions towards heritage conservation, especially if it incorporates emotional messages (Jacobs and Harms, 2014; Wijeratne *et al.*, 2014).

Interpretation may be classified into non-personal interpretation, such as interpretive signs, panels and multimedia presentations; and personal interpretation, such as guided tours and performances (Kalman, 2017). Since tour guides/personal interpreters play a major interpretive role, they can enhance public awareness and understanding about sustainable heritage conservation issues (Huang, Lee, and Chan, 2005; Ong, Ryan, and McIntosh, 2014; Wijeratne, et al., 2014) but they need to enhance their interpretive skills and professional ethics (Ong, Ryan, and McIntosh, 2014). Furthermore, they should be aware of the inevitable subjectivity in the interpretation process since they may stress some aspects and ignore others. This selectivity may lead to trivialization and is considered an inevitable problem that affects public understanding of a CHS (ICOMOS-ICIP, 2006).

Furthermore, Silberman (ICOMOS-ICIP, 2006:3) proposed an important issue regarding the relationship between interpretation and conservation: Interpretation is: *'parallel to conservation, whose purpose is to maintain a physical link with the past. Interpretation, in contrast, preserves a non-physical link'*. Moreover, Francesco Bandarin emphasized that: *'conservation is not an end on itself but is a tool that is used for interpretation purposes'*, however; the efforts dedicated to conservation and those to interpretation are detached (ICOMOS-ICIP, 2006:3). Grimwade and Carter (2000:34) urge that CHSs are exposed to conservation and restoration efforts, but their presentation and interpretation is yet insufficient. This may cause the CHS to *'become meaningless, and understanding of human history is lost'*.

### **The relationships among ICOMOS principles of interpretation and presentation of CHS**

After investigating the relationship between the two terms of 'interpretation' and 'presentation' in the introduction part, it is vital to figure out the inter-linkages and overlapping relationships incorporated in the seven ICOMOS principles– neglected in the ICOMOS Charter.

Proper '*access*' to interpretive content enhances public awareness and engagement, and thus, facilitates the '*understanding*' and appreciation of cultural heritage sites. This will clearly foster public responsibility towards site conservation. Towards achieving '*understanding*' of a place; however, McNaughton, Morrison and Schill (2016) urge that scholars do not apply as rigorous methods when assessing the scientific significance of intangible heritage as they do in tangible heritage studies. In this sense, Jacobs and Harms (2014) confirmed that educational programs should be designed to increase understanding and awareness. However, the significance of CHSs cannot be accurately communicated to the public – which would lead to understanding and conservation – without methodologically well-documented scientific '*information sources*', including three types: primary (living cultural traditions, any written work, such as poems, documents, fieldwork reports, and published research); secondary (dictionaries, encyclopedias, and textbooks), and tertiary (indexes, abstracts, and databases).

*'Attention to setting and context'* aims to preserve both the tangible and intangible assets of cultural heritage sites in their natural, cultural, and social settings and contexts. In fact, an archaeological site is not limited to a separate location distinct from its surroundings - it is connected to its wider context (Copeland, 2006). It should be interpreted inclusively rather than in isolation from its intangible heritage, i.e. the living traditions of its associated communities (Taylor and Altenburg, 2006). Similarly, Taylor (2006) emphasized that interpretation is not only about telling visitors facts on the site as they may not enhance their understanding of its significance but also it encompasses socio-cultural qualities associated with the site such as folklore.

This mandates consideration of the wider cultural landscape or historic landscape patterns to which it is inextricably linked (Macinnes, 2004). Consequently, Al-Busaidi (2010) emphasized that interpretation is linked to the wider contexts in which CHSs are located, i.e. their stewardship, socio-cultural, socio-economic, socio-environmental and socio-political contexts. Therefore, '*preservation of authenticity*' is important in this context. The study on Mongol *Ger* with the investigation of its tangible

and intangible components and its related authenticity is a clear example (Paddock and Schofield, 2017).

Apparently, interpretive infrastructure, visitor pressure, imprecise or improper interpretation can disrupt heritage conservation plans unless authenticity of heritage assets is preserved (Kolar and Zabkar, 2010; Silberman, 2008; Yeoman, Brass, and McMahon-Beattie, 2007) since the Venice Charter in 1964 (Jerome and Editor, 2008), and Nara Document on authenticity in 1994 (ICOMOS, 1994; Saouma-Forero, 2000). The San Antonio Declaration resulted from the Interamerican Symposium on Authenticity in the Conservation and Management of the Cultural Heritage in 1996, and the conference on New Views on Authenticity and Integrity in the World Heritage of the Americas, held in Mexico in 2005 reflected deep insights on authenticity (Rössler, 2008). Besides, authenticity is also important for behavior and experience (Castéran and Roederer, 2013; Kolar and Zabkar, 2010).

However, authenticity – as a theoretical construct – is still complex, controversial and dynamic (Di Betta, 2014) as there is no single precise definition that can answer some fundamental questions, such as: first, what is authentic interpretation? second, Are some interpretations more authentic than others? Different perspectives of authenticity are discussed by Wesener (2017) including the 'realistic/ontological perspective', 'the constructive perspective' and the 'experiential perspective'. As well, different aspects have been linked to authenticity, including: object-based authenticity and existential authenticity (Bryce *et al.*, 2015; Kolar and Zabkar, 2010; Wang, 1999); misplaced/misused heritage aspect (Cohen, 1988; Kolar and Zabkar, 2010; Tunbridge and Ashworth, 1996; Wang, 1999); and the staged authenticity (MacCannell, 2004) where the heritage itself and/or its '*contexts*' have been manufactured. The Egyptian obelisks scattered all over the world, which adorn famous squares in Rome, Istanbul and Paris are clear examples of staged authenticity. Similarly, Newall (1987) discussed the term folklorismus, which means the invention, creation and imitation of folklore outside its original local context. Folklorismus is utilized in cultural tourism as an interpretive approach for ancient practices or archaeo-folklore, e.g. culinary traditions, dancing, songs, handicrafts, in a culture.

Another dilemma regarding the relationship between heritage preservation and authenticity was highlighted by Hill and Cable (2006) who argued that most interpreters seek to provide personal authenticity for visitors since people vary in their perceptions of authenticity according to their previous experience and values.

So, interpretation should be carried out with great care and should consider evidence from diverse '*sources*' to achieve '*authenticity*' and '*sustainability*' of heritage sites. '*planning for sustainability*' not only encourages public '*understanding*' of conservation efforts but also fosters public involvement in these efforts (*concern for inclusiveness*) and, therefore, ensures the continuous maintenance of the interpretive infrastructure and regular evaluation of its interpretive content. Carr (2004) agreed with Uzzell (1989) that interpretation has the potential to achieve CHS sustainability through improving visitor management, local economic, environmental gains and community involvement.

In terms of planning for social sustainability, local community is considered: an indispensable agent in the total tourism chain and a main actor/stakeholder in interpretation planning, implementation, management and evaluation (Binks, 1986; Fitton, 1996; Inskeep, 1991; Jamal and Getz, 1995; Murphy, 1985; Novelli and Benson, 2005; Ryan and Montgomery, 1994; Simmons, 1994; Taylor, 1995; Tosun, 2000); an active player in the interpretation process using their social experience (Goodson and Phillimore, 2004; Lenik, 2013; McManamon and Hatton, 2000); a conservation guarantor due to the sense of ownership (Bramwell and Lane, 1993; Price, 1994; Verdini, Frassoldati and Nolf, 2017); the direct presenters of a CHS (Boniface, 1995; Moscardo, 1998); and the identifier of the recurring and interconnected principles of a country (McNaughton, Morrison and Schill, 2016).

Thus, site managers, archaeologists, custodians and museum curators should consider that interpretation/presentation programs must enable local community involvement as a tool for sustainability (Blockley, 1999; Ritchie and Crouch, 2003; Uzzell 1998) as indicated in UNESCO Convention for the Safeguarding of Intangible Cultural Heritage in 2008 (Leimgruber, 2010). In this context, Wells (2017: 778) argues that heritage professional should discard the role of '*heritage police officer*' and instead become a '*facilitator*' of community-based values. Especially, that some types of cultural attraction relate to living cultures, therefore, socio-cultural impacts can be a particularly important consideration (Inskeep, 1991).

In this context, interpretation can: encourage community involvement and foster ownership and pride in heritage (Hoffman, 1997; Loosley, 2005; McManamon and Hatton, 2000; Tabata, 1989); be an effective communication mechanism to develop behavioral change and positive attitudes to conservation (Herbert, 1989; Herbert *et al.*, 1986; Prentice, 1993); survive socio-economic swings (Stewart *et al.*, 1998). Thus, training and educating local people involved in tour guidance is

considered a major focus of social sustainability (Black, Ham, and Weiler, 2001; Orbasli 2007; Weiler and Ham, 2002).

Also, the concept and vital role of 'community-based interpretation' (Marshall, 2002) and its link to 'community archaeology' (Crosby, 2002; Enqvist, 2017; Marshall, 2002; Pape, 2012) should be developed as a main tool for sustainable heritage interpretation.

The '*concern for inclusiveness*' principle also implies that all stakeholders and associated communities should be involved in the development and implementation of interpretation/presentation programs. In this respect, these stakeholders and associated communities will compose ensure site conservation. Huang, Lee and Chan (2005) emphasize that interpretation plays an important communication role between heritage resources, stewardship and local communities; therefore, it serves as a management tool.

Also, '*research, training, and evaluation*' will develop technical and professional strategies for heritage interpretation and presentation in our way to accomplish ICOMOS principles and; therefore, achieve heritage conservation.

Thus, to achieve 'planning for sustainability', 'setting and context', 'authenticity' and 'inclusiveness' principles, accurate, diversified, and authentic 'information sources', proper 'access and understanding', and proactive 'research, training and evaluation' are needed. So, these principles could be classified into two levels (see figure 1): level A comprises more fundamental principles, on which the more-advanced governing principles at level B are based. Level A includes: access and understanding, information sources, and importance of research, training, and evaluation. These more fundamental principles should be in place before the four more-advanced governing principles (Level B) i.e. planning for sustainability, attention to setting and context, preservation of authenticity, and concern for inclusiveness can be achieved. This classification helps identify the points of intersection among principles in formulating indicators and avoiding redundancy which will be the basis of the ICOMOS Charter content analysis.

However in order to fulfil conservation through ICOMOS principles; there are major problems addressed by Lon Addison which have an effect on the development of an evaluation tool in terms of funding allocation, the inaccuracy of collected data, the lack of availability of archived documentation to the public, the gap between theory and practice, lack of coordination amongst stakeholders, the longevity of digital data and devices, data authorship protection, and data sharing possibilities (ICOMOS-ICIP, 2006). Silberman (ICOMOS-ICIP, 2006) warned of the

problem of authenticity and the dangers of using technology to the public perceptions of the past.

### **Results and discussion**

The resultant check list – including the categories and the indicators – is built on the fact that interpretation and presentation cannot be separate terms as defined by ICOMOS in Silberman (2008). The terms are considered synonymous as understood by Al-Busaidi (2010); Aldridge (1975); AHI (2014); Brochu and Merriman (2002); Moscardo (1998); Prentice (1996); Stewart *et al.* (1998); Taylor (2006); Tilden (1977) and Uzzell (1989).

To fully understand how ICOMOS principles of interpretation and presentation of CHSs could achieve site conservation, the relationships among ICOMOS principles were analyzed to figure out incorporate inter-linkages and overlapping that eventually lead to heritage conservation. So, these principles were classified into two levels (see figure 1). This classification helps identify the points of intersection among principles in formulating indicators and avoiding redundancy which will be the basis of the ICOMOS Charter content analysis.

### **The significance of the checklist**

Respondents' comments (coded R1 to R33) highlighted the importance of this endeavor – as emphasized before by Silberman (2008) – and their willingness to be part of it: *'This is a very valuable initiative and comprehensive document. Thank you for those who have developed it'* (R4); *'Useful to have a checklist as the tool for this sort of evaluation. Meaning that most sites will have staff able to carry out an assessment without big problems'* (R23). Additionally, some comments hope that this checklist could be appropriate for CHSs across the globe: *'I am indeed keen to be part of this interesting (potentially/hopefully globally relevant) endeavor as far as heritage interpretation and presentation is concerned'* (R32). This generalizability issue was raised up before by many scholars who discussed the western approach of understanding world heritage (see Acheson, 2017). The issue that was tackled in this research by the heterogeneity of respondents who represent all parts of the globe not only Americans and Europeans.

Some heritage experts asked for permission to use the checklist in their professional work: *'By coincidence, I am also attempting to devise an evaluation system for two Asian Development Bank interpretation projects [my organization] is undertaking in the Punjab. Would it be possible/appropriate for me to use some of the information in the*

*checklist?*' (R1). Another respondent said: *'I would like to ask you to keep me updated if possible on the tool as it seems to be something that I would be able to use very usefully in my own professional practice. I work on archaeological sites, mainly in Italy, and I can already see more than one opportunity to carry out an evaluation of this kind'* (R13). The two instances from India and Italy signifies the global need to this kind of research and again reflect on its generalizability.

### **Checklist reliability**

*Due to the importance of this study, some ICOMOS-ICIP members shared the checklist more widely with their colleagues and wider professional networks. R6 explained that: 'we applaud these efforts and are reviewing. I have also sent for comments to my '[name of network]' colleagues'. Another respondent commented: 'I think this is an exceptionally useful initiative. I will be happy to provide comments and will discuss with colleagues in my office' (R3). This adds to the reliability of results as they involved work professional teams and networks.*

Following the modification of some questions and the addition of others, a second round enabled the achievement of consensus on the checklist. Almost all the respondents commented on how the checklist could be modified in a real-life evaluation: *'Will there be further specification regarding what constitutes 'not met', 'partially met' and 'fully met' to avoid mere subjectivity and enable comparison with other evaluations? Also, 'not applicable' should be added as not all indicators will be relevant to all sites. Alternatively, each indicator should have a proviso to make clear that its relevance is conditional'* (R5). This was fixed in the final checklist by adding the required constitutes to all indicators.

### **Appropriateness**

Another issue was whether this detailed and complex checklist would be relevant to the majority of CHSs in the world, especially smaller ones, as it assumed full resourcing and staffing. R5 agreed with R3 who highlighted this issue: *'.... this is very detailed and assumes full resourcing of the CHS - very few places enjoy such funding and staffing. The checklist criteria are divided into smaller and smaller elements which adds to the complexity and gives too many opportunities for smaller less well-funded CHSs to fail with a low score – and they may give up on interpretation all together or dress up their efforts so that they are 'inauthentic', but high scoring. So, scoring brings with it some risks - how does the evaluator score "not relevant"' (R21).*

Other comments on the appropriateness of some indicators for all sites due to the sites' diversity: *'may not be relevant for all sites'* (R18). R15 agreed with R2 that: *'the list is very comprehensive and includes criteria that may be less relevant to some type of sites. A rationalization or restructuring to account for site characteristics might be helpful'*. Another comment was that *'not all sites will have tour guides. Perhaps organization of the checklist should be considered by site type (e.g. staffed vs unstaffed) to avoid asking (busy) managers going through the whole list with many indicators that do not apply to their sites'* (R24). R17 also commented on the availability of a training venue: *'Difficult for many sites to guarantee – we do much of our training on site for this reason!'*. Consequently, *'not applicable'* was added as not all indicators will be relevant to all sites.

### **Scoring**

Some statements were against the idea of a scoring system without a clear explanation of how this scoring will be used: *'I am not clear how this checklist will be used, but the idea of a “score” makes me nervous. As a checklist for documenting a CHS, this document is wonderful. But a simple score based on a checklist fails to weight quality or priority'* (R9). Other comment was: *'although I think that this list is excellent, I am not sure that a score per se correlates with the broad activities outlined above. To score you would need to specify weightings for each degree of involvement in each activity. However, I do believe that this is an excellent and sound list'* (R27).

Hence, a fair and relevant scoring system was developed. The list is divided into seven criteria; each criterion incorporates a few indicators which are scaled by means of four options: 'N/A' = not applicable, '0' = applicable but not met, '1' = partially met and '2' = fully met. Then the percentage of total applicable points is calculated to weight the fulfillment of this criterion. N/A option means that the indicator is not relevant to the site from the viewpoint of the evaluator and, in turn, would not be counted in the overall score by the evaluator.

### **Evaluators/targeted audience and implementation**

Some comments questioned the target audience for the checklist and who should implement it: *'Managers planning interpretation at their sites? Evaluating existing interpretation internally? Externally-managed studies?'* (R19). Another statement was: *'for this feedback to be useful it seems that there needs to be an indicator of the persons responding, e.g. is this for visitors and users, staff, fellow professionals, other*

*stakeholders?*' (R20). To ensure the applicability of the checklist, some comments enquire about whether evaluators could possibly evaluate some indicators *'how this [indicator] would be evaluated?'* (R16). Another issue is the potential subjectivity of implementers/evaluators: *'It will be important to specify acceptable methods for evaluation for each indicator to ensure validity and avoid subjectivity. This will also give further support for evaluators without research experience'* (R25).

Therefore, evaluators would be independent heritage professionals (from ICOMOS members or relevant governmental bodies, such as a ministry of antiquities). They should seek evidence for the fulfillment of each indicator on-site, methods could include: observation; documentation; interviews; focus groups. They can also write any comments to be included in the final evaluation report and finally evaluate the total score for each criterion.

Evaluators could use the final checklist for evaluation and write a report. However, they should seek evidence of the achievement of each indicator – listed in the last column of the checklist – putting in mind the diversity of CHSs and the applicability of indicators. The resultant evaluator report, including percentages for the fulfillment of the various criteria, should help site managers to adjust their interpretation and presentation plans and take the appropriate decisions and actions to enhance those plans in the future.

Moreover, site managers could use the same checklist as a benchmark for sustaining site conservation and raising their interpretation and presentation to international standards. They should justify why certain actions were/weren't taken and provide the requisite evidence for evaluators. Future short-term and long-term actions of site managers concerning interpretation and presentation programs would rely on the report resulting from this evaluation. Upon the delivery of the evaluation report, the site manager should have the right to comment on points in the report and, if necessary, present more evidence to clarify any misinterpretation. Evaluators should respond to the site manager's objections and amend the report appropriately.

### **The development of indicators**

Developed categories and indicators were constructed based on *Ename* Charter principles/criteria; however, the literature added a lot to the checklist indicators. Especially, the importance of educational programs to increase understanding and awareness – discussed by Jacobs and Harms (2014). Also, the necessity to understand the wider context of a heritage asset (Al-Busaidi, 2010; Copeland, 2006; Macinnes, 2004; and

Taylor and Altenburg, 2006). The influence of authenticity on behavior and experience (Castéran and Roederer, 2013; Kolar and Zabkar, 2010). The other aspects linked to authenticity, including: object-based authenticity and existential authenticity (Bryce *et al.*, 2015; Kolar and Zabkar, 2010; Wang, 1999); misplaced/misused heritage (Cohen, 1988; Kolar and Zabkar, 2010; Tunbridge and Ashworth, 1996; Wang, 1999); the staged authenticity (MacCannell, 2004); folklorismus (Newall, 1987); social experience and local guidance (Black, Ham, and Weiler, 2001; Goodson and Phillimore, 2004; Lenik, 2013; McManamon and Hatton, 2000; Orbasli 2007; Weiler and Ham, 2002); social sustainability and the sense of ownership, identity, pride in heritage and a sense of belonging (Bramwell and Lane, 1993; Hoffman, 1997; Loosley, 2005; McManamon and Hatton, 2000; Price, 1994; Qin, 2016; Tabata, 1989; Verdini, Frassoldati and Nolf, 2017); community-based interpretation (Marshall, 2002) and community archaeology (Crosby, 2002; Marshall, 2002; Pape, 2012); and the role of interpretation as a management tool (Huang, Lee and Chan, 2005). By reaching a draft checklist from this, the respondents' comments helped as follows:

### **Emphasis on quality of interpretation**

Some comments address the importance of quality in evaluating the interpretation and presentation program: *'there should be a focus on quality rather than quantity of interpretation. There are many sites where on-site interpretation is not desirable'* (R14). Moreover, participants added many indicators to each criterion and suggested eliminating some that seemed inappropriate from their viewpoints. Furthermore, they suggested to merge some indicators under different criteria to avoid redundancy *'is there a way to combine the archive indicators listed here and under "access and understanding" to avoid near-duplication and slim down the list?' (R33)*. After the second round, the final version of the checklist was produced.

### **Cost of indicators**

R1 commented that some of the indicators: *'May be too costly. That would not be practical'*; *'[Indicator] is very ambitious for many smaller less well funded sites'* (R22); *'Consider "Maintenance of the interpretive infrastructure is economically feasible"' (R6)*; *'In some sites the website is not interactive for technical/funding reasons, but they provide alternative online forums for the public'* (R26). Some ideas also suggested by heritage experts to overcome cost issues *'Online forums and webinars are sometimes the only way that staff can have exchanges when there are budget restrictions for attendance of events/training'* (R28).

Thus, they agree with Carr (2004) and Uzzell (1989) that interpretation has the potential to achieve CHS sustainability including economical dimension.

### **Terminology and meaning**

Experts asked for clearer definitions for some terms mentioned in the checklist, *'this term [cultural benefits] needs to be defined'* (R29); *'In all it appears very thorough, I think there is just a need to clarify terminology and be clearer about some of the criteria – each one is open to interpretation by the evaluator'* (R12). Some experts recommended reading certain resources to clearly identify some terms, *'an extra point can be the used methods on site, when talking about physical interventions, like reconstructions. Suggestion: several interventions are used to clarify the object to the public: (choose) restoration, reconstruction, re-creation, replication [see definitions in English Heritage policy statement set out in 2001, paragraph 5]'* (R8); *'You might already know it but Rayner's publication on Access in Mind for intellectual access is very useful'* (R30).

Some comments uphold the proper understanding of the significance of authenticity by evaluators who will apply this list, such as: *'this might benefit from further clarification of 'authenticity'. Some might understand this as only supporting performances that originate from the site's period of creation, which would take it out of contemporary connections and meanings'* (R10).

In terms of sustainability, special emphasis was given to socio-cultural sustainability, *'... community benefits should also be measured in terms of socio-cultural benefits: increased social and cultural inclusion, enhanced spiritual values, opportunities for inter-generational contact, life-long learning and formal educational opportunities, increased sense of place and community pride, etc., etc., and intangible values! Interpretation can have a big impact on sites of spiritual/religious significance regarding intangibles'* (R31).

In terms of inclusiveness, there is an emphasis on the necessity of wisely involving all related stakeholders: *'Inclusiveness, however, must not occur at the expense of decision-making and clarity. With inclusiveness, it is important to identify genuine means of involvement for all players at the project inception stage'* (R7). Also, stress was given to involving local community: *'... from my point of view some further emphasis on visibility of relevance, i.e. clear inclusiveness of (local) community, must be extra valued'* (R11).

R11 recommended putting much more emphasis on involving the public in developing interpretation and presentation programs and focusing on

obtaining inputs from people of different backgrounds and age groups. Also, some experts recommended other stakeholders to be involved in the planning, implementation and evaluation of the interpretation and presentation programs, 'What about other authorities or institutions? For example, the involvement of a religious organization in the interpretation of a specific religious site. Or a private organization in the interpretation of one of its privately-owned sites' (R13).

The used terms and meanings in the final checklist were verified according to the recommended references and the consensus among participants.

### The final checklist

The final checklist is intended to bridge the gap between theory and practice as far as the interpretation and presentation program evaluation is concerned which is a necessity (see Silberman, 2008). Hence, it is more comprehensive and includes indicators deemed to be appropriate, starting from the more fundamental technical ones up to the topmost interpretive quality criteria (table 2).

**Table 2: The final checklist**

Criterion 1: Access and Understanding					
Indicators	N/A	0	1	2	Evidence(s)
1.1 CHS layout including the Interpretation and Presentation Installations and Materials					
1.1.1	The site and its layout include sufficient and easy-to-use routes for both vehicles (if desirable) and pedestrians to access the various interpretation elements, where possible, and there are suitable places for visitors to sit/rest to absorb the information.				
1.1.2	The site entrance welcomes and orientates visitors and is often the focus for interpretation of the site. The site entrance is designed to: enable the easy flow of visitors to the site; reflect the significance of the site; provide for diverse experiences based on visitor experience and understanding; facilitate visitor flow management.				
1.1.3	The site is accessible to persons with physical impairments and/or cognitive/intellectual disabilities, and disabled facilities exist where appropriate.				

1.1.4	There are a relevant number of on-site installations – enough but not too many (interpretive installations, kiosks/receptors, museum-type displays, galleries, exhibitions, sculptures, computer monitors, digital media, sculptures, maquettes, etc) to reflect the site’s significance and location.					
1.1.5	Where the site or areas of it are sensitive to additional installations, interpretative media has not been installed or has been selected for its limited impact on the heritage resource.					
1.1.6	In situations where the site itself is inaccessible because of its fragility, ongoing maintenance, refurbishment, cultural sensitivities or safety issues, there are a relevant number of off-site interpretation elements accessible to reflect the site’s significance and why these areas are inaccessible.					
1.1.7	The interpretive signs should be as timeless as possible and ideally are designed in a way so that they can be easily updated or enhanced (subject to budgetary constraints).					
1.1.8	Multiple forms of media applications and virtual access are included at the site for different audiences, if appropriate.					
1.1.9	The materials interpreting the site are varied (brochures, pamphlets, booklets, maps, apps, digital media, audio tours, QR codes, etc.) and are available to, and downloadable by, the public.					
<b>1.2 The Interpretation and Presentation Program</b>						
1.2.1	The site has a formally-documented accessible interpretation and presentation plan underpinning its implementation program.					
1.2.2	The interpretive content is relevant and accessible to diverse (specialist and non-specialist audiences).					
1.2.3	There is a system for engaging local, and wider interested, communities – in developing and implementing the interpretive content of the site.					
1.2.4	The interpretive content is presented in a way to cater for different learning styles and abilities.					
1.2.5	Various languages, graphics and media are used to communicate the interpretive content to identified, different audiences and local					

	community as evidenced through audience research.					
1.2.6	There is a system for maintaining the development of the interpretation and presentation program as new interpretations are able to be made and new technologies influence the modes of presentation.					
<b>1.3 Website and Social Media</b>						
1.3.1	There is an effective official website for the site.					
1.3.2	Electronic interpretation of the site is communicated on the website, social media, on-site QR codes, and downloadable podcasts for the public, as appropriate to the site.					
1.3.3	Social media and social media pages have been developed in parallel with the official website and are linked to it and actively monitored.					
1.3.4	The website provides opportunities for the public to contribute.					
<b>1.4 Personal Interpretation</b>						
1.4.1	Self-guided tours supported by brochures are facilitated at the site.					
1.4.2	Events, art programs, education kits and programs, downloadable school programs etc. and other ways to encourage visitors to engage with the site are facilitated at the site.					
1.4.3	Professional guided tours are facilitated at the site.					
Total Score		-- / Applicable points				
Percentage		%				
<b>Criterion 2: Information Sources</b>						
Indicators		N/A	0	1	2	Evidence(s)
<b>2.1 Interpretive Sources</b>						
2.1.1	There is a multidisciplinary interpretation plan of the site based on a variety of information sources, which guides the interpretation and presentation approach and activity at the site.					
2.1.2	The interpretive content incorporates the traditional storytelling and/or oral history and/or ongoing living traditions, of local people as appropriate and alternatives if any, associated with the site.					

2.1.3	Physical interventions, such as visual reconstructions or re-creations of historical places (by artists, architects, or computer modelers), are based on documented information sources, and respond to the guidelines set out in the Seville principles (López-Menchero Bendicho, 2013).					
2.1.4	In cases where the earlier state of a site is controversial, alternative visual reconstructions or re-creations (if any) based on the same evidence of documented information sources, are acknowledged.					
2.1.5	Recreation of oral histories, if any, is based on documented information sources.					
2.1.6	Extensive oral history, documentary, visual, film, newspaper and other historical research have been undertaken by specialists (e.g. historians and/or heritage interpreters).					
<b>2.2 Archives, bibliographies, and range of documentation</b>						
2.2.1	Earlier versions of interpretation and presentation programs are archived and are available for the public.					
2.2.2	There is an archive of information sources that is accessible to the public.					
2.2.3	Electronic archives are available online.					
Total Score		-- / Applicable points				
Percentage		%				
<b>Criterion 3: Attention to Setting and Context</b>						
Indicators		N/A	0	1	2	Evidence(s)
<b>3.1 Multifaceted Significance of the site</b>						
3.1.1	The interpretive content communicates both tangible and intangible values of the site to diverse audiences.					
3.1.2	The interpretive content reflects on the layers of historical periods and stories relevant to the site. This requires stakeholder and community consultation to avoid prioritizing any single phase or story without overwhelming visitors.					
3.1.3	The interpretive content includes information on the broader cultural, natural and geographical setting of the site.					
3.1.4	The interpretive content reflects the diversity of the site includes local traditions; arts; customs;					

	culinary heritage crafts; festivities; music; histories, as appropriate to the site.					
3.1.5	Cross-cultural or multi-cultural perspectives are clearly identified and are included in the interpretive program.					
3.1.6	The interpretive content has been based on careful historic research and analysis of a range of documents sources, including oral histories.					
3.1.7	The interpretive information has been responsibly researched and validated, then arranged logically (thematically, spatially or otherwise, as appropriate to the site).					
Total Score		-- / Applicable points				
Percentage		%				
<b>Criterion 4: Conservation of Site Authenticity</b>						
Indicators		N/A	0	1	2	Evidence(s)
<b>4.1 Authenticity of the Interpretive Content</b>						
4.1.1	The interpretive content reflects the authentic local culture appropriate to the site's location.					
4.1.2	The visible interpretive infrastructure is designed to complement the site and conveys its authenticity.					
4.1.3	Any plans for events-based programs, such as on-site concerts and dramatic performances, pay special attention to the authenticity of the site and the local community.					
4.1.4	The interpretation contributes to conservation of the heritage and its authenticity through raising awareness of significance, potential fragility of the heritage and how visitors can contribute to conservation.					
<b>4.2 Tour Guides (if appropriate)</b>						
4.2.1	Interpretation conveys conservation messages and guides have a major role in modeling visitor behavior and understanding of conservation needs of the site.					
4.2.2	Tour guides use original objects or replicas, first-hand experiences, and appropriate research in their interpretation so they can deliver authentic experiences to visitors.					

4.2.3	In the case of misplaced/misused heritage (staged authenticity) where the heritage itself has not been altered but it has been placed or presented in a different context, tour guides explain how the heritage itself and/or its contexts have been manufactured and for what reason(s).					
4.2.4	In the case of folklorismus (Anglicized to folklorism - the invention, creation and imitation of folklore outside its original local context) tour guides explain and provide justification.					
4.2.5	A regular survey is conducted on tour guides' perceptions of authenticity and whether they provide their personal authenticity for visitors based on the fact that people vary according to their previous experience and values.					
4.2.6	Tour guides are trained and provided with updated information related to the heritage site on a regular basis so that they can revise their own personal interpretation of the site in line with new discoveries, research and understanding of site significance.					
Total Score		-- / Applicable points				
Percentage		%				
<b>Criterion 5: Planning for Sustainability</b>						
Indicators		N/A	0	1	2	Evidence(s)
<b>5.1 Socio-Economic Dimension</b>						
5.1.1	There is a specific budget allocated for the implementation of site management plan including the interpretation and presentation program and extra conservation required so that the site can bear visitor numbers without significant damage.					
5.1.2	Economic impact assessment measures the number of locals employed in the delivery of interpretive programs.					
5.1.3	The Heritage Interpretation Plan includes a model for building socio-economic capacity for communities near or at the site.					
<b>5.2 Socio-Cultural Dimension</b>						
5.2.1	The interpretation action plan is justified to locals on the basis of successful cases where interpretation had involved local people in					

	planning, defining and presenting the distinctive heritage aspects of their site.					
5.2.2	To achieve social sustainability, communities take an active part in the interpretation process and consequently, value, sustain and rediscover cultural resources in their surroundings.					
5.2.3	Site managers, archaeologists, custodians and museum curators adopt ‘community-based interpretation’ approach to enable local people involvement in the interpretation process as the direct presenters of the site.					
5.2.4	Interpretive messages support community identity, encourage community involvement, and social and cultural inclusion, enhance spiritual values, foster community pride in heritage, increase sense of place and ownership among communities, provide opportunities for inter-generational contact, encourage life-long learning and formal educational opportunities, etc.					
5.2.5	As effective heritage resource conservation depends to a greater extent on local community appreciation and understanding; conservation programs take the responsibility to foster an archaeologically-knowledgeable local community.					
5.2.6	The heritage interpretation plan trains and educates local people involved in the interpretation and presentation of the site in heritage conservation, significance and interpretation.					
5.2.7	There is a system for employment opportunities that promotes the inclusion of local people in tour guidance both within and outside the site itself.					
5.2.8	The heritage interpretation plan develops an effective communication mechanism to develop a behavioral change and positive attitudes to conservation.					
5.2.9	The heritage interpretation plan includes a model for building social capacity for communities near or at the site.					
5.2.10	The heritage interpretation plan incorporates an assessment of the socio-cultural impact of the interpretive infrastructure on the site’s heritage fabric.					

5.2.11	There is a system for retaining and distributing knowledge about the site for its current managers and for future generations.					
5.2.12	In cases of cultural sensitivity, the interpretation and presentation program aims to educate visitors about what is culturally sensitive and why.					
<b>5.3 Environmental Dimension</b>						
5.3.1	'Carrying capacity' studies analyze the impact of visitor numbers on the way a site is shown and interpreted and provide suggested visitor management techniques.					
5.3.2	The heritage interpretation plan incorporates an assessment of the environmental impact of the interpretive infrastructure on the site's heritage fabric and is used to inform the levels of sustainable authenticity and integrity.					
5.3.3	Interpretation and presentation program objectives clearly foster the sustainability of the site.					
5.3.4	Interpretation and presentation program evaluation criteria includes sustainability fulfilment.					
5.3.5	The interpretation and presentation of the site encompasses responsible messages to the public towards the conservation challenges.					
5.3.6	The public's participation in the conservation efforts done so far due to oriented interpretation and presentation are celebrated, acknowledged, and documented.					
5.3.7	Most elements of the interpretive infrastructure are designed in a way that it can be maintained using local skills with a system in place to do so.					
Total Score		-- / Applicable points				
Percentage		%				
<b>Criterion 6: Concern for Inclusiveness</b>						
Indicators		N/A	0	1	2	Evidence(s)
6.1	Site managers, heritage professionals, communities and individuals from local communities – including those with physical impairments, tourism operators, professional tour guides and local interpreters, conservation experts, and local public authorities, are involved					

	in the planning, implementation and evaluation of the interpretation and presentation programs, as appropriate.					
6.2	International bodies (e.g. ICOMOS, ICIP, CIPA, ICOM, IUCN, ICCROM, UNESCO and WHC) are stakeholders in the interpretation and presentation programs, where relevant.					
6.3	The rights, responsibilities and interests of property owners, local communities, and visitors are clearly addressed in the interpretation and presentation programs.					
6.4	The public is consulted (by implementing a review e.g. every 5 years of its success) and the advice and input of a variety of adults and youth, of various levels of: education and development; backgrounds; age groups, is obtained and used in the development and evaluation of interpretation and presentation programs and in making additions or revisions to them.					
6.5	The site offers a variety of interpretation activities, which involve the local community.					
6.6	Life-long learning programs are designed to meet the needs of audiences with a variety of backgrounds and age groups.					
6.7	Intellectual property (e.g. copyright of images, texts, on-site multimedia presentations, digital media, and printed materials) is acknowledged and protected as part of the interpretation and presentation program, including traditional knowledge.					
Total Score		-- / Applicable points				
Percentage		%				
<b>Criterion 7: Importance of Research, Training and Evaluation</b>						
Indicators		N/A	0	1	2	Evidence(s)
<b>7.1 Research</b>						
7.1.1	On-going research related to the site is regularly undertaken to identify the interpretation needs of different audiences including visitors and custodians.					
7.1.2	On-going research related to the site is regularly shared with the site team so that interpretation					

	content can be renewed and updated.					
7.1.3	On-going research is conducted by an appropriately-qualified research team at the site to ensure the interpretive content and delivery methods remain relevant and successful.					
7.1.4	An appropriately-equipped venue and library for research is available, where possible.					
7.1.5	Public conferences, presentations and workshops are organized and/or attended at regular intervals.					
<b>7.2 Training, Lecturing and Meetings</b>						
7.2.1	There is a well-equipped venue for training and lecturing.					
7.2.2	Participation is encouraged in training programs for both related staff and members of local communities. These programs are offered and/or attended in specialized fields of heritage interpretation and presentation, i.e. content creation, management, technology, and tour guiding, as part of the continuous improvement of the delivery of interpretation at the site.					
7.2.3	The basic conservation training program includes a component on how conservation and interpretation and presentation are linked.					
7.2.4	There is a well-publicized program of lectures, training sessions, guided tours, and workshops and other events.					
7.2.5	Digital online training, lecturing and meetings, and on-demand training are possible.					
7.2.6	There is engagement with related stakeholders, especially educational institutions and the media, to communicate and use the interpretation program.					
7.2.7	There are exchanges of professional staff with other CHSs nationally and internationally, through a variety of experiences and media such as online forums and webinars.					
7.2.8	National and regional meetings of heritage professionals are convened at the site at regular intervals.					
<b>7.3 Evaluation</b>						
7.3.1	Regular evaluation of the interpretation and presentation efforts is conducted on an ongoing basis (e.g. every five years).					

7.3.2	Periodic changes and expansion are made to the interpretation and presentation program based on the results of the evaluation and new data/research /discoveries related to the site.					
7.3.3	Visitors, local people, and heritage professionals are involved in the evaluation process.					
Total Score		-- / Applicable points				
Percentage		%				

### Conclusions

Analysis of the ‘*Ename Charter*’ principles for the interpretation and presentation of cultural heritage sites – in the light of relevant literature – emphasized that the terms are not separate; they are interlinked and can be classified into two groups: one more fundamental than the other (see figure 1). This classification identified the points of intersection among principles when analyzing their contents to formulate evaluation indicators. Therefore, the final checklist was formulated as concisely as possible.

Both the empirical study and literature accentuated that the evaluation of interpretation and presentation programs of CHSs is crucial for their sustainable conservation. Interpretation/presentation and conservation efforts should complement each other – the developed theoretical framework (figure 1) addresses this insight.

The ICOMOS-ICIP committee supported the need for a valid, reliable, and scientific tool for evaluating interpretation and presentation programs at CHSs to guarantee a certain level of sustainable conservation. This paper presented an analysis of the ICOMOS Charter for interpretation and presentation, discussed the development of an evaluation checklist for interpretation and presentation programs, and made proposal for its implementation, using Delphi Technique. This final checklist (see appendix) provides a benchmark to the evaluation of the interpretation and presentation programs of CHSs starting from the technical aspects up to the topmost interpretive quality ones. Heritage experts/Evaluators could use this checklist to evaluate the effectiveness of CHS interpretation and presentation programs to figure out to what extent these programs could lead to CHS conservation.

Therefore, it provides CHS managers with an evidence base for making decisions to plan and enhance their interpretation and presentation programs to meet international standards and to achieve heritage conservation. Moreover, UNESCO could use the resultant checklist to

evaluate World Heritage Sites (WHSs) and take relevant actions and enhancements.

One of the major issues is the generalizability of the resultant evaluation checklist especially that the membership of ICOMOS-ICIP is dominated by USA and European heritage professionals who represent more than two third of the total members. This supposes the domination of the western values over the checklist and raises a serious question over its generalizability. However, the heterogeneity of the respondents' demography overcame this issue and supports the checklist generalizability. Therefore, a countless number of evaluation studies could be conducted by heritage professionals using the resultant checklist.

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