Guide to activating
the heritage resource in
the SDGs

Vol. 1
Cultural heritage

Letter from the Chancellor of the University of Córdoba

This guide, published by the University of Córdoba, arose from a UCO Social Innova project in the Galileo Plan, where the not-for-profit association, CUCO, Córdoba UNESCO Club, asked for collaboration from the HUM 428 research group. Shortly afterwards, this gave way to a larger scale project funded by the Andalusia Regional Government Department of Development, Land Planning and Housing. The result is three guides, one for a cultural heritage resource, one for urban green heritage and one for house-courtyards, which aim to provide a tool for those in charge of heritage management to design a strategy in line with the 2030 Agenda Sustainable Development Goals (SDGs), promoted by the United Nations in 2015. The international organisation acknowledged the role of culture in the sustainable development of cultural and natural heritage, with local communities being involved "to promote sustained, inclusive economic growth, social development and protection of the environment".

We live in a heritage city. This has been recognised by UNESCO with successive entries on the World Heritage list. Mosque-Cathedral (1984), extended to Historic Site (1994). The Courtyard Festival (2012) and the Caliphate city of Medina Azahara (2018).

On a daily basis, this poses the challenge of making social well-being compatible with proper management of heritage assets, in such a way that development is ensured, without compromising their conservation, and going much further than mere value for tourism. Córdoba can become an inspirational model for other historic cities when it comes to the use and enjoyment of cultural and natural heritage, ensuring its conservation, protection and safeguarding, to achieve sustainable development without doing away with the logical historical path of the city in contemporary terms.

The University of Córdoba has committed to sustainability with various research groups and units, and projects and partnerships, aware that promoting a green city is a priority, where the ecosystem human beings live their lives in is cared for and lives alongside heritage, in all its many forms, whether material or intangible. This is the root of the importance of this publication. Sustainable management improves the surroundings, the environment, accessibility, safety, cohabitation and well-being of the general public.

This guide does not just enable understanding and application of sustainability, it also serves to educate and raise awareness amongst heritage managers and society in general about the need to get involved in building a better environment.

Manuel Torralbo Rodríguez
Chancellor of the University of Córdoba

Prologue

The Andalusia Regional Government Department of Development, Land Planning and Housing, via the General Secretariat for Property, aims, amongst others, to promote and drive scientific and academic work carried out with Andalusian Public Universities. It is firmly convinced that it has an impact that benefits progress and the well-being of the Andalusian public with the transfer of the results obtained.

Therefore, since 2018, it has been calling for tenders for grants that seek to encourage the generation of knowledge by funding research projects proposed by the university bodies themselves.

In this way, in the call for tenders for Grants for Research Projects from Andalusian Public Universities in 2022, which was on a competitive basis, a total of fifteen research projects were beneficiaries. Due to their affinity with six priority lines, they gave a response to matters - Property, Architecture, Refurbishment and Architectural Heritage - that the General Secretariat for Property is responsible for.

In this context, the project submitted by the University of Córdoba, in collaboration with CUCO, Córdoba UNESCO Club, PAX - La Axerquía Courtyards and the Córdoba Industrial Heritage Association, "UCO 22-01, GARPODS: The guide to activating a heritage resource in the SDGs", is in line with priority matter "5. Refurbishment of historic centres, both buildings and historic centres along with industrial heritage, taking reuse and new uses into account, placing value on the habitability and co-habitation dimension, analysing the impact of tourism activity, and drawing up proposals that counteract gentrification".

As a result, amongst the various fruits of this research, we find this guide, set out as a triptych, depending on the subject addressed.

Taking into account the cultural legacy to be found throughout the geography of Andalusia, with many historical sites declared, and the need to address the city inherited with heritage criteria, to safeguard it, this guide arises as an opportunity to meet the proposals of the SDGs, placing heritage values at the centre, at all levels, as a key element to the inevitable development being under sustainable criteria.

The direct applicability of the results with knowledge transfer to society, either with this Department's policies, or with developments led by the Andalusia social fabric, rises up as one of the cornerstones of these grants. This work falls in with this desire to improve the habitat we live in, involving all social stakeholders.

Alicia Martínez Martín
General Secretary for Property

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*Words have been underlined to indicate they are part of a specific glossary. This resource has the aim of providing definitions and clarifications of key terms in the content.

Presentation of the complete work

GUIDE TO ACTIVATING THE HERITAGE RESOURCE IN THE SDGs

In this Decade of Action, when we are urged to intensify efforts to achieve the goals and challenges proposed in the United Nations 2030 Agenda, the participation of the various social stakeholders seeking to promote sustainable development in the surroundings they live in is needed. With this aim, this ambitious project arose, which does not conform to theoretical intentions, but instead has translated into specific actions with three guides for activation - cultural heritage, natural heritage and house-courtyards - based on the United Nations Global Compact SDG Compass methodology.

This innovation, research and transfer project was set up using a network of collaboration with various departments at the University of Córdoba. It was supplemented with a process of dialogue and consensus amongst those responsible for managing a cultural heritage resource, a natural heritage resource or a house-courtyard. Therefore, a project was developed with a theoretical and practical focus fostering an inclusive view including heritage as the backbone for sustainable development.

It is an education and awareness programme, in line with the Andalusia Urban Agenda for heritage in the city, with citizens taking part and responsibility, which involves the preservation of techniques and traditions, and the inclusion of innovation and use of new technologies to support sustainable management of house-courtyards, material cultural heritage resources and natural heritage resources that are urban by nature. The intention is to provide guidelines enabling strategies to be used that include the essence of the 2030 Agenda Sustainable Development Goals.

At the same time, it promotes restoration of historic centres, the reuse and new uses of historic buildings, putting value on the habitability and co-habitation dimension, and facing up to the challenges of the global city. All of this is with the support of bodies committed to innovation and the well-being of society, such as the non-profit association CUCO Córdoba UNESCO Club and PAX - La Axerquía Courtyards. This multi-disciplinary partnership targets revitalising historic centres, preserving traditions and counteracting gentrification, all of which is aimed at fostering habitability and harmonious co-habitation in the city.

The intention of showing the role that heritage has in achieving sustainable development and how it contributes to a community's well-being can be added to this. With this goal, starting with creating awareness about, and including, the 2030 Agenda and the Sustainable Development Goals, we hope to provide measures that enable a better future for generations to come. This initiative is not limited just to Córdoba and its province. It aspires to be an example that will inspire other regions, offering an urban regeneration model that is built at the hand of the general public, creating a sense of belonging via sustainability.

The three guides that have been created are as follows:

The guide to activating a **cultural heritage** resource is aimed at museums, monuments, visitor centres, libraries, archives, archaeological sites, groups of archaeological sites, industrial heritage and contemporary architecture who seek to include sustainability into their management.

The guide to activating an **urban green heritage** resource is for use by parks and gardens, roadside trees, and landscaped roadside infrastructures - squares, dividers or roundabouts -, cemeteries and riversides where is intended to integrate sustainability into their management.

The guide to activating **house-courtyards** is aimed at individual homes and communal housing that have courtyards, tourist accommodation in house-courtyards, convents and monasteries with cloisters and/or courtyards, as well as the houses that take part in the courtyard festival, all of which have an interest in integrating sustainability into their management.

Taking into account the needs and specifications in each one of the three cases, a series of tools has been designed with the aim of making it easier to align heritage management with the SDGs. Using them will enable efficient use of the resources, safeguarding and conserving the heritage for future generations, due to the knowledge and skills passed on by the heritage community.

Context

Source: United Nations

The purpose of sustainable development is to reach the balance between social development, economic growth and environmental protection to achieve an equitable, feasible, habitable planet.

The United Nations Sustainable Development Goals (SDGs) make up a universal, transformative, inclusive route map. The horizon is 2030, a global alliance to eradicate extreme poverty and hunger, and fight inequality and climate change.

Furthermore, all institutions and people are called to contribute to sustainable development because, so that global transformation may come about, we must begin with local transformation.

By adopting this agenda in 2015, the international community has, for the first time, acknowledged the transversal role of culture in sustainable development.

UNESCO sets out heritage as an end, a driving agent and facilitator for achieving the SDGs[1], and as a means, or an instrument, that improves the effectiveness of development programmes.

"The guide to activating the cultural heritage resource in the SDGs" was prepared using the SDG Compass methodology, which is a simple, visual tool enabling heritage elements to include the essence of the SDGs into their management.

Definition of sustainable development
In 1987 the United Nations General Assembly set up the Brundtland Commission which defined sustainable development as the progress meeting the needs of the present without compromising those of future generations.

[1] Hosagrahar, J. (2017). La cultura, elemento central en los ODS. *Correo*. Available at: https://es.unesco.org/courier/april-june-2017/cultura-elemento-central-ods

Introduction
to cultural heritage

WHY ARE THE SDGs IMPORTANT FOR HERITAGE RESOURCES?

The SDGs identify the priorities in the United Nations ambitious agenda for sustainable development, firm up the targets that must be reached by 2030, and seek to mobilise the resources needed by calling on the global alliance. Governments, businesses, institutions and civil society are all needed to transform our world, put an end to poverty and look after our planet. Ultimately, to construct a better world, now and in the future.

The Millennium Development Goals (MDGs), predecessors of the SDGs, were revolutionary because they offered common discourse to reach a global agreement, but only committed to developing countries. In 2015, the United Nations verified that developed countries, as well as those less-favoured, were facing the same challenges. The SDGs were approved by all the governments and their success depends largely on the action of all the players involved.

The 2030 Agenda gives the opportunity to protect and safeguard heritage using target 11.4., highlighting the importance of creating sustainable cities and communities.

The SDGs allow understanding of how appropriate management of heritage resources helps to achieve sustainable development, minimising negative impacts and maximising positive impacts on people and the planet.

All relevant issues worked on in managing any organisation are covered by the SDGs. Therefore, the SDGs can help to connect the strategies of the institutions with global priorities. The SDGs are not just a guide to sustainable development. They are also a planning, monitoring and control tool enabling:

Recognition of the local contribution to global goals
Acting locally contributes globally, but identifying how we contribute is not easy, although it is necessary to be able to include suitable actions. The SDGs are a compilation of global needs that help each community to stop and think and decide where to act. Therefore, implementation of the SDGs makes it easier for the people in charge of heritage management to define their contribution to sustainable development.

Identifying and placing value on sustainable actions that are already being carried out at the heritage resource

The majority of heritage elements already carry out actions encouraging sustainable development, but management is not usually aware of the impact they cause and do not place value on it.

Detecting new opportunities for action

The heritage elements that give innovative solutions to the goals set by the SDGs will attract public and private investment, precisely because the sustainable development agenda seeks to redirect resources at worldwide level towards the challenges the SDGs represent. They have become a reference framework for Corporate Social Responsibility strategies.

Improving the value of sustainability

Integrating the SDGs enables the alignment of heritage management towards sustainability (processes, infrastructures, stakeholders, planning and programmes) and involves efficient use of resources, cost savings and changes to more sustainable alternatives.

Strengthening relationships with stakeholders and keeping up-to-date with policy development.

The SDGs include participation by the stakeholders and the agendas of the local, regional, national and international governments. Heritage resources aligning their management with the SDGs comply with the law and reinforce their prestige for their stakeholders (visitors, local community, employees, suppliers, volunteers and funders). Whoever does not do so, exposes themselves to the growing legal and reputational risks.

Implementing measures that take stakeholders' satisfaction into account

It is important to ensure that sustainable management of the heritage resource takes the needs of the various stakeholders into account, enables all of them to have a satisfactory experience, and benefits the visitor as well as the person in charge of heritage management.

Convert heritage into a vital partner in *the UNESCO Education for Sustainable Development programme*

This initiative seeks to educate and train people in the local environment in order to achieve the SDGs.

Heritage is an exceptional route for educating society in the values of sustainability, and raising awareness of the social and environmental crisis we are facing.

Understanding heritage as a key element in the fight against climate change

The SDGs enable heritage elements to reconsider their role in the 21st century, take a stance given the global challenge, and progress to take on an active function as agents for change, particularly in social activation of urban heritage, enabling densification, replanting and strengthening the idea of the 15-minute city, committing to a compact model instead of a scattered city.

Sharing the same language and goal

The SDGs are a universal route map that uses a common language to communicate impacts and commitments to organisations. By sharing the same purpose, all the actions add together to face up to the most urgent social and climate challenges in the world.

" **Culture is an intrinsic part of the human experience and, with the adoption of the 2030 Agenda for Sustainable Development in 2015, the international community also recognized the role of culture as a driver of sustainable development"**

Audrey Azoulay
Director-General of UNESCO, 2018

WHAT IS THE SDG COMPASS AND HOW HAVE WE ADAPTED IT TO HERITAGE?

SDG Compass is a methodology that guides organisations in aligning their strategy towards sustainability and measures and communicates their contribution to the SDGs.

SDG Compass has been a source of inspiration in designing the method, which gives heads of management and owners of cultural heritage, green/urban heritage and courtyard houses resources the tools and know-how needed to put sustainability at the centre of their activity[2].

A connecting thread exists between the three versions of the guide, because, for example, there are heritage elements that include a cultural asset, a garden and a courtyard all at once.

The guide is visual, with simple, accessible language, for easy, quick and extensive understanding and implementation. A theoretical framework and a practical approach have also been included, to serve as an inspiration to those in charge of heritage management.

In the case of cultural heritage milestones, the guide is suitable for museums, monuments, visitor centres, libraries, archives, archaeological sites, groups of archaeological sites, industrial heritage and contemporary architecture.

Moreover, the guide is organised into sections adapting each one of the SDG Compass' five steps to the heritage milestones:

01 Understanding SDGs
In this step, it is a priority that the heritage resources know about and understand the SDGs. Heritage has its own features and the principles must be adapted to its language.

02. Defining priorities
It is important to determine the starting point for sustainability at the heritage resource and set out a diagnostic identifying, with the stakeholders, the relevant issues for management, as well as the priorities and positive, negative, current and potential impacts on the SDGs.

03. Setting goals
Setting goals is fundamental to the success of any organisation and encourages the coordination of priorities at internal level.
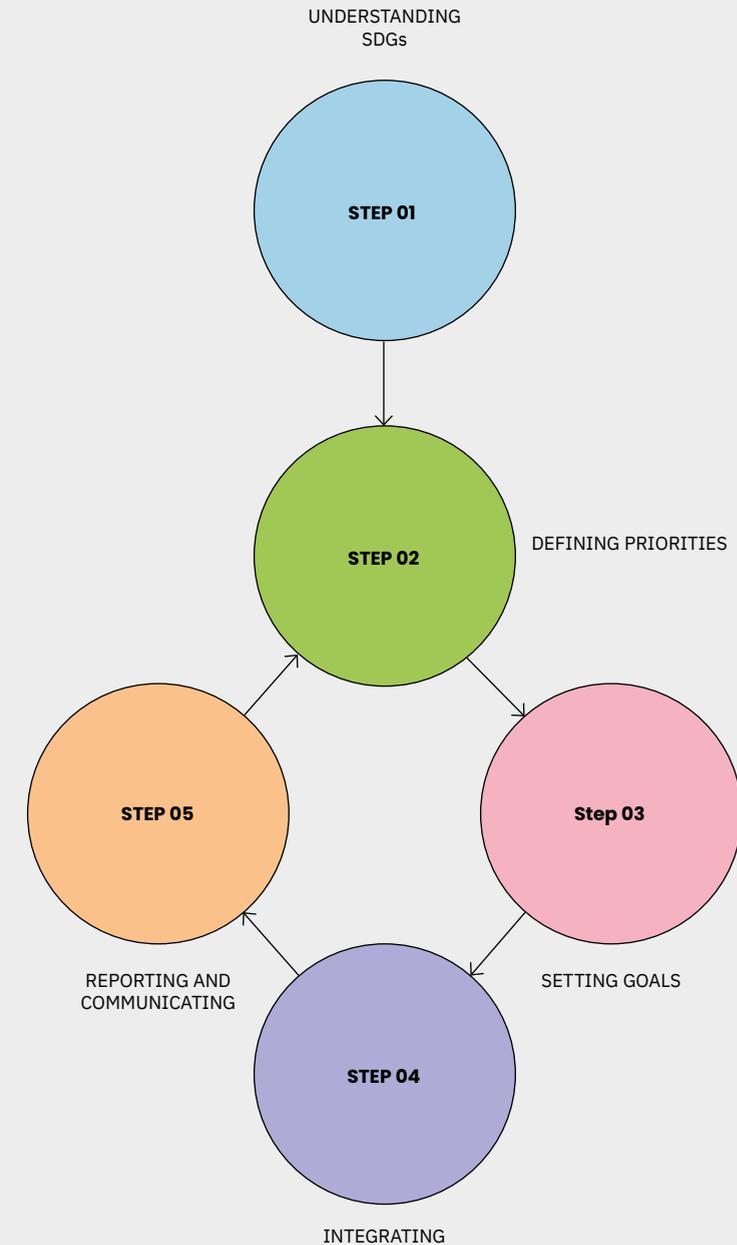
Furthermore, the person managing a heritage element can demonstrate their commitment to global sustainable development by aligning their local action plan with the SDGs and the policies of the various authorities.

04. Integrating
To achieve these goals, it is fundamental to plan the sustainability measures defined within the activity and innovative governance of the heritage element. Procedures need to be designed in order to integrate, track and control the action plan. Furthermore, it is essential to take part in alliances with heritage role models, supplier bodies, authorities, the private sector and civil society, because sustainability issues cannot be managed in isolation.

05. Reporting and communicating
The heritage resources managing bodies must report to the stakeholders about their contribution to sustainable development, and their commitment to progress, by publishing the diagnostic, the action plan, the indicators and their priorities. In this way, the prominence of heritage as a driving force for development is highlighted.

UNDERSTANDING SDGs

STEP 01

DEFINING PRIORITIES

STEP 02

SETTING GOALS

Step 03

INTEGRATING

STEP 04

REPORTING AND COMMUNICATING

STEP 05

The 5 steps of the SDG Compass methodology

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[2] SDG Compass has been adapted to heritage in three different cases, the "Guide to activating a cultural heritage resource in the SDGs", "Guide to activating urban green heritage in the SDGs" and "Guide to activating courtyard houses in the SDGs".

Understanding SDGs

In this first step, embracing the SDGs and understanding the opportunities and responsibilities involved in managing the cultural heritage resource is a priority.

In 2019, marking the 10 years left to achieve the 17 SDGs in 2030, the UN Secretary General, António Guterres, "called on to all sectors of society to mobilise for a Decade of Action on three levels: global action to secure greater leadership, more resources and smarter solutions for the SDGs; local actions embedding the needed transitions in policies, budgets, institutions and regulatory frameworks of governments, cities and local authorities; and people action, including youth, civil society, the media, the private sector, unions, academia and other stakeholders, to generate an unstoppable movement pushing for the required transformations"[3].

Now we are going to remind ourselves about what the SDGs are, how they arose, how they can be built into existing heritage responsibilities, and how cultural heritage resources can benefit from them.

CONCEPTS

→ **What are SDGs?**
→ **Heritage's contribution to the SDGs.**
→ **Mission, vision and minimum responsibilities of the cultural heritage resources.**

[3] Decade of Action: 10 years to transform the world https://www.un.org/sustainabledevelopment/decade-of-action/

What are SDGs?

The Sustainable Development Goals (SDGs), also known as Global Goals, were adopted by the United Nations in 2015 as a universal call to put an end to poverty, protect the planet and ensure that, by 2030, people everywhere would enjoy peace and prosperity.

The 17 SDGs include 169 targets and, in turn, are measured by 244 indicators.

For more information, see the website.

Resolution approved by the General Assembly on 25 September 2015

https://www.un.org/en/development/desa/population/migration/generalassembly/docs/globalcompact/A_RES_70_1_E.pdf

Framework of worldwide indicators for the SDGs and 2030 Agenda targets for sustainable development

This link takes you to the 244 indicators proposed by the United Nations after their review in 2020: https://unstats.un.org/sdgs/indicators/Global%20Indicator%20Framework%20after%202023%20refinement_Eng.pdf
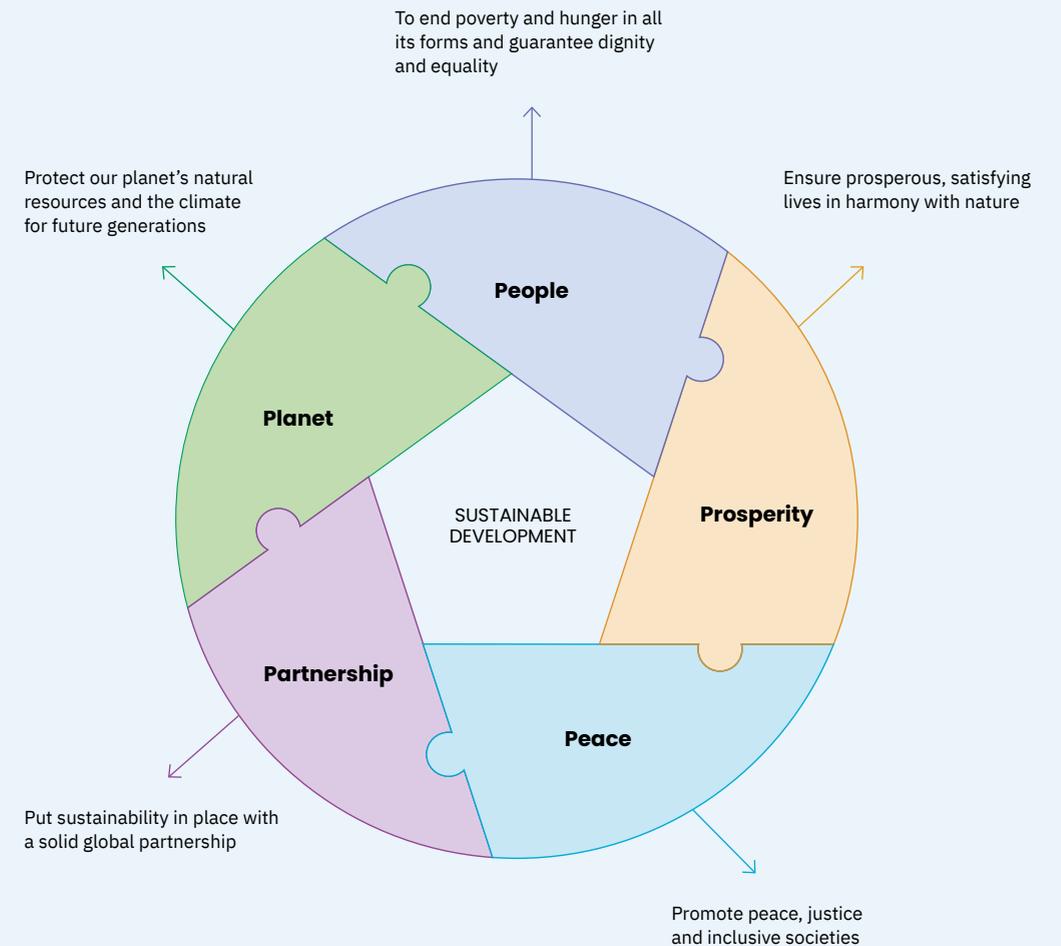
The world is interconnected and, therefore, it is considered that the SDGs are included, which means that action in one area affects the results in others. This is a highly important factor that must be taken into account when sustainable development seeks to find the balance between social development, economic growth and environmental protection.

All the SDGs are equal in priority and cannot be achieved without attaining each one of them.

The goals are universally applicable to developing and developed countries. The countries have undertaken to prioritise the progress of those that lag behind the most.

Moreover, the SDGs are the result of the most extensive, participatory consultation process in the history of the United Nations and represent a multilateral consensus between governments and various players, such as civil society, the private sector and academia.

Worldwide creativity, knowledge, technology and financial resources are needed to achieve the SDGs in all their contexts.

To end poverty and hunger in all its forms and guarantee dignity and equality

Protect our planet's natural resources and the climate for future generations

Ensure prosperous, satisfying lives in harmony with nature

People

Planet

Prosperity

SUSTAINABLE DEVELOPMENT

Partnership

Peace

Put sustainability in place with a solid global partnership

Promote peace, justice and inclusive societies

The 17 SDGs can be classified into **5 dimensions**, known as the 5 Ps: People, Planet, Prosperity, Peace and Partnership.

PEOPLE

SDG 1. End poverty in all its forms everywhere.

SDG 2. End hunger, achieve food security and improved nutrition and promote sustainable agriculture.

SDG 3. Ensure healthy lives and promote well-being for all at all ages.

SDG 4. Ensure inclusive and equitable, quality education and promote lifelong learning opportunities for all.

SDG 5. Achieve gender equality and empower all women and girls.

PLANET

SDG 6. Ensure access to water and sanitation for all.

SDG 12. Ensure sustainable consumption and production patterns.

SDG 13. Take urgent action to combat climate change and its impacts.

SDG 14. Conserve and sustainably use oceans, seas and marine resources.

SDG 15. Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, halt and reverse degradation and halt biodiversity loss.

PROSPERITY

SDG 7. Ensure access to affordable, reliable, sustainable and modern energy for all.

SDG 8. Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

SDG 9. Build resilient infrastructures, promote inclusive and sustainable industrialisation and foster innovation.

SDG 10. Reduce inequality in and among countries.

SDG 11. Make cities and human settlements inclusive, safe, resilient and sustainable.

PEACE

SDG 16. Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, responsible and inclusive institutions at all levels.

PARTNERSHIP

SDG 17. Strengthen the means of implementation and revitalise the Global Partnership for Sustainable Development.

Heritage's contribution to the SDGs

In the introduction to this guide, we consider thought heritage resources can benefit from using the SDGs to plan, direct and communicate their strategies, targets and activities. Therefore, in this section, we want to highlight the role of heritage as a fundamental, transversal factor in fulfilling the SDGs

The 2030 Agenda refers, for the first time, to culture within the framework of the 17 SDGs adopted by the United Nations in September 2015.

Safeguarding and promoting culture are two aims on the agenda for sustainable development and, at the same time, means that contribute to achieving many SDGs.

The SDGs transcend the exclusive aim of economic growth to devise a better future based on prosperity, equity, inclusion, peace and environmental protection. This audacious vision of the capabilities of heritage requires creative responses that replace the usual linear and sectoral approaches.

The international development programme expresses a wider vision of culture, that includes its role in sustainable development via cultural and natural heritage, cultural and creative industries, local culture and products, creativity and innovation, the native populations, traditional materials and cultural diversity.

Furthermore, experience and research has shown the importance of the communities' knowledge and participation in achieving sustainable development.

In this way, heritage can be considered to be a driving force that directly contributes to attaining social, economic and environmental benefits, and also serves as an instrument that improves the effectiveness of development programmes, as we are going to describe with examples below:[4]

— Heritage can contribute to **eradicating extreme poverty** by restoring historic urban buildings, with full respect for the heritage values and giving access to infrastructures and basic services, such as energy, drinking water and sanitation systems.

— Intangible heritage, including local knowledge and skills, can help to **reduce the exposure and vulnerability to extreme phenomena linked to the climate,** and other environmental problems and disasters.

— Heritage, particularly agricultural and cultural landscapes, **can provide services and benefits to ecosystems, as well as food security and sustenance** for millions of people.

— Heritage is fundamental **to ensuring healthy lives and well-being for everyone**, at all ages, including in cultural landscapes, public spaces and historic urban

— It is important for a heritage resource to be managed sustainably to ensure its conservation and that present and future generations do not stop developing their skills linked to well-being and quality of life.

— Material and intangible heritage provides **learning opportunities** enriched with objects, places and experiences that involve the intellect, emotion and senses, providing vivid, hands-on opportunities to discover the past, understand the world surrounding us and strengthen a sense of identity.

— Heritage provides clear examples of how **women** contribute to local and global development as **professionals** in the sector and as transmitters of practices, know-how and other cultural expressions to future generations.

— The viable, continued use of water, based on traditional methods, offers **valuable lessons to those responsible** for it - environmental engineers, architects, landscape gardeners and urban planning managers - showing how water systems worked in the past and giving opportunities for taking or adapting initiatives to support or design sustainable practices for the future.

— Appropriate maintenance and management, and careful adaptation of existing buildings, leads to **greater energy efficiency**, while partially reducing the need for new buildings that consume energy in all the stages of theirconstruction and require waste management strategies.

— Adopting sustainable methods, materials and traditional construction techniques, designed, in their day, to combat the climate and compatible with the local lifestyle which also use locally-sourced renewable materials can also **reduce energy consumption**. When the traditional approaches are not sustainable, alternative energy solutions that respect the environment should be looked into.

— The social, cultural and natural capital of heritage sites plays an important role in attracting creative industries, businesses, inhabitants and visitors, encouraging economic growth and prosperity. These economic activities must be an opportunity **to create decent employment, encourage inclusive, local economic development and avoid gentrification.**

[4] Heritage and the sustainable development goals: policy guidance for heritage and development actors. ICOMOS, March 2021.
https://openarchive.icomos.org/id/eprint/2453/13/ICOMOS_SDGPG_2022%20-%20FINAL3.pdf

— Heritage practices and sites can provide exchange platforms for sharing identities and experiences, that help **mitigate social inequality and encourage social cohesion and dignity in the communities**.

— Heritage practices and sites embody many **templates for sustainable consumption and production,** based on an understanding of the reasonable use and reuse of natural resources and confidence in local materials.

— In the search for a more just, inclusive and peaceful society, heritage can provide **opportunities for cultural rapprochement among people, fostering mutual understanding, tolerance and peace.**

— Furthermore, the local identity ties created by cultural assets contribute to **citizen participation** in the processes of making decisions about their local and territorial environment.

— The cultural and natural heritage conservation and management processes **ensure partnerships,** that is to say, **interdisciplinary, inter-generational and inter-sectoral** collaborations between the authorities, academia, public and private organisations, expert personnel and civil society.

— **Sustainability is a lifestyle,** it is an individual's commitment on their own personal and professional scale to future generations. **By living and feeling heritage, values are worked on,** such as responsibility, respect, empathy, solidarity, effort, creativity, austerity, tolerance, dialogue, diversity, commitment, fraternity and public spirit. These attitudes are needed to change our habits and behaviour to support people and nature.[5]

Transforming our world: the 2030 Agenda for sustainable development
Article 36 adopted by the 193 Member States of the United Nations:

"We pledge to foster intercultural understanding, tolerance, mutual respect and an ethic of global citizenship and shared responsibility. We acknowledge the natural and cultural diversity of the world and recognize that all cultures and civilizations can contribute to, and are crucial enablers of, sustainable development".

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[5] Resolution approved by the General Assembly on 25 September 2015, https://www.un.org/en/development/desa/population/migration/generalassembly/docs/globalcompact/A_RES_70_1_E.pdf

Mission, vision and minimum responsibilities of the cultural heritage resources

This guide is based on sustainable management of heritage resources, with the responsibility of complying with current legislation, respecting the internationally approved minimum standards and universal rights, and always consistent with its mission and vision.

The United Nations Global Compact is the initiative leading sustainability in world organisations. It is a call for them to align their management with the Ten Principles of the UN Global Compact on Human Rights, employment standards, the environment and the fight against corruption.[6]

Respect for human rights, which includes the right to culture in article 27 of the Universal Declaration of Human Rights is a minimum responsibility for all institutions and its infringement cannot be offset by any efforts to promote universal rights or progress with sustainable development.

The failure to comply does not just damage the image of the heritage landmark itself, but also compromises its viability.

On the other hand, it is fundamental that the mission and vision for the heritage resource include the SDGs values and principles, so that they are assimilated by the institution and used during decision making.

In this first step, it is also highly important to create a sustainability team with a person in charge of coordination and heading up the key departments for management, protection, conservation and dissemination of the heritage resource or, if appropriate, appoint a person in charge.

The sustainability route that must also be defined by those in charge must be aligned to the heritage element's mission, vision and values.

Finally, it is crucial to be aware of the heritage case's legal framework because this conditions the definition of the action plan towards sustainability, which fosters the reduction of negative impacts and maximises the positive impacts on people and the planet.

Minimum regulations, legislation and directives in cultural heritage

Over the past few decades, permanent dialogue amongst institutions, administrations, expert personnel in the world of heritage and civil society have given shape to the legislative framework for responsible, ethical management, with the aim that present and future generations know how their cultural identity came about.

Apart from the international and national regulations, there are municipal planning ordinances and instruments that firm up the rules for heritage resources in the area.

On the other hand, a high percentage of the laws applicable to heritage resources are linked to the SDGs. These regulations help to identify alignment with and contribution to the 2030 Agenda. It is advisable, and inspirational, to use the regulations as a filter and see where heritage sits in relation to The SDGs.

[6] The Ten Principles of the UN Global Compact: https://unglobalcompact.org/what-is-gc/mission/principles

In practice.
Current regulations and legislation

As an example, by way of inspiration, the following annex includes the main regulations and recommendations for application to a cultural heritage resource in Córdoba.

Scope of application:

1. UNESCO
2. Council of Europe/European Union
3. Spanish State
4. Regional
5. Provincial/Municipal

RESOURCES

Generic regulations for cultural heritage in Córdoba
Download our full document.

Defining priorities

To benefit from the opportunities and challenges the SDGs offer, define where your heritage resource's priorities are to be found, because it will help you to focus your efforts.

Not all 17 SDGs will be important to the same extent for your heritage element. Your level of contribution to each SDG, and the challenges and opportunities they represent individually, will depend on many factors.

Your first task, as head of heritage management, should be to carry out a diagnostic of alignment with sustainability, in other words, do a self-assessment of the current and future, positive and negative impacts of your heritage on the SDGs.

This will enable you to reduce, or eliminate, negative impacts and maximise positive impacts on the planet and on people.

The step describes how you can define your heritage resource's priorities using three main actions:

ACTIONS

→ **Identifying relevant issues to detect areas of impact.**
→ **Selecting indicators and compiling data.**
→ **Defining priorities.**

Identifying relevant issues to detect areas of impact

A materiality analysis is a fundamental tool for procuring that our heritage resource is sustainable and responsible in decision making. It enables us to identify the relevant issues for our sustainability team and stakeholders. We must set priorities and performance indicators to measure and track our progress in sustainability.

In order to prepare the materiality analysis in our practical approach, we have considered the criteria of starting from the 5 dimensions (5 Ps) of the sustainable development agenda (People • Planet • Prosperity • Peace • Partnership) for the following reasons:

— As we pointed out in *Step 01 Understanding SDGs*, the 5 Ps have already been given their own SDGs and, therefore, we can easily establish the direct and secondary impacts of each relevant issue.

— To strengthen the performance of a local player so that they can contribute to global transformation from the very first moment.

We have also followed six consecutive phases:

1. **Identification of the stakeholders**
   Description of the cultural heritage element's interest groups and compiling information about their expectations and concerns.

2. **Identification of relevant issues**
   An analysis by the sustainability team of the important matters in the chain of activities carried out when managing the cultural heritage resource.

   These relevant issues also have a high positive or negative impact in economic, social and/or environmental terms. Moreover, we have to consider the relevant issues based on the expectations and concerns of our stakeholders.

3. **Involvement of the stakeholders**
   Presentation of the relevant issues to the stakeholders to identify them properly and assess their priority.

4. **Validation**
   Verification of the materiality matrix results by the sustainability team.

   This should take into account that the relevant matters for stakeholders may not be the same at the internal level. Therefore, a balance should be found to address the important issues for their stakeholders and also the sustainability team.

5. **Selecting indicators and compiling data**
   This has the purpose of setting up a diagnostic that is a starting point for alignment with the SDGs.
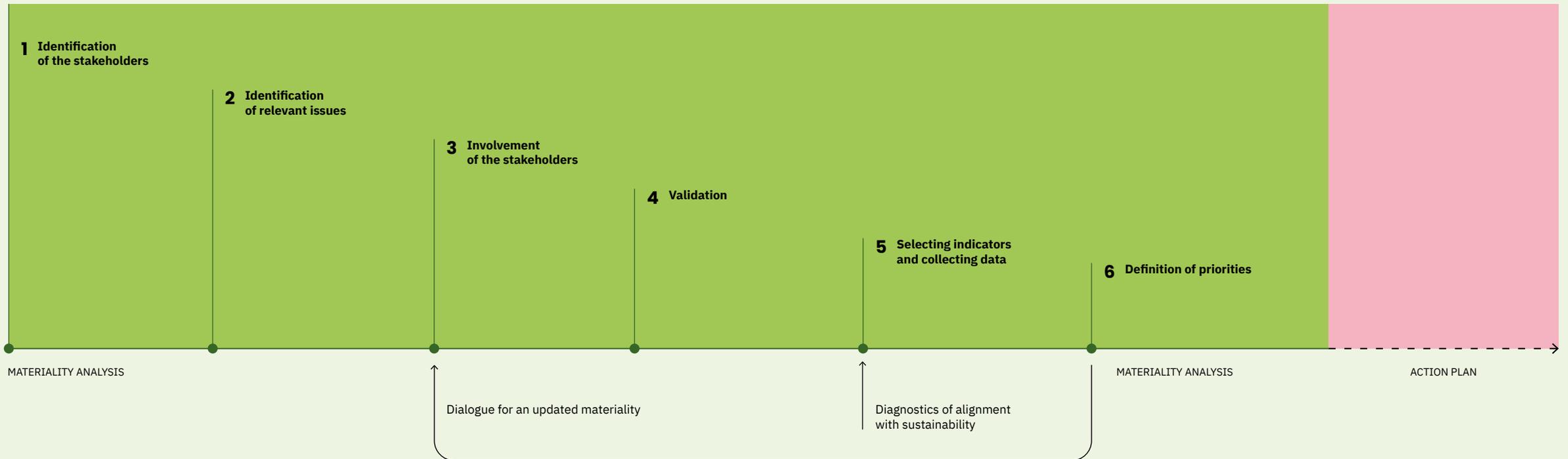
6. **Definition of priorities**
   Application of the internal and external conclusions by the sustainability team. The relevant issues identified in the materiality analysis are those that should be included in the heritage resource's action plan.

Stages for a materiality analysis

STEP 02
Defining priorities

STEP 03
Setting goals

1 **Identification
of the stakeholders**

2 **Identification
of relevant issues**

3 **Involvement
of the stakeholders**

4 **Validation**

5 **Selecting indicators
and collecting data**

6 **Definition of priorities**

MATERIALITY ANALYSIS

MATERIALITY ANALYSIS

ACTION PLAN

Dialogue for an updated materiality

Diagnostics of alignment
with sustainability

In practice.
Identification of relevant issues

As an example, by way of inspiration, we set out the 22 relevant issues identified below, once the six stages described above have been followed and in accordance with experts in cultural heritage management and the stakeholders.

DIMENSION	MATERIALITY ISSUE	N°
People	Dissemination and awareness	1
People	Training	2
People	Public health	3
Planet	Biodiversity	4
Planet	Procurement of services	5
Planet	Circular economy and waste management	6
Planet	Sustainable management of water resources	7
Planet	Sustainable management of equipment and fittings	8
Planet	Plant health	9
Planet	Energy transition and climate change	10
Prosperity	Accessibility and inclusion	11
Prosperity	Heritage conservation, protection and safeguarding	12
Prosperity	Employment and working conditions	13
Prosperity	Sustainable economic management	14
Prosperity	Sustainable tourism management	15
Prosperity	Equal opportunities	16
Prosperity	Investment and funding	17
Prosperity	Digital transformation	18
Prosperity	Users and local community	19
Peace	Ethical management, good governance and transparency	20
Peace	Citizen participation	21
Partnership	Public/private partnerships and collaborations	22

RESOURCES

Identifying materiality issues
Download our full document.

Description of the materiality issue
Download our full document.

WHY IS THE MATERIALITY ANALYSIS IMPORTANT FOR THE CULTURAL HERITAGE RESOURCE?

1. The materiality analysis is a fundamental tool for understanding and addressing the relevant issues for our sustainability team and stakeholders.

2. It enables resources to be assigned efficiently as it concentrates efforts on the highest priority issues. It ensures a sound sustainability strategy with a long-term view.

3. It strengthens the relationship with stakeholders, opening continuous dialogue that takes their expectations, concerns and priorities into account, which means we work with greater transparency and commitment, and improve our image.

4. Funders, public authorities and certifications frequently require a materiality analysis to be carried out.

INVOLVING THE STAKEHOLDERS

The term stakeholders, or interest groups, includes all the groups of people, whether internal or external, who are directly or indirectly affected by the heritage element's activity. They have their own needs and expectations and, therefore, influence decision making.

The stakeholders identified for a cultural heritage resource were:

— Visitors,
— local community,
— employees,
— supplier companies,
— funders,
— public authorities,
— volunteers,
— patronage or other government or representation body.

There are many tools and methodologies for listening to, and dialogue with, each interest group. The most common and functional, without having expert knowledge, are individual interviews, group work and multidisciplinary meetings, forms distributed using social networks or e-mail and in-person surveys.

In practice.
Involving the stakeholders

The research team that collaborated in preparing this guide has compared its criteria for materiality issues with those in charge of managing cultural heritage milestones.

This proposal of relevant issues is not obligatory. It is a source of inspiration for those in charge of management.

Stakeholder survey

Sustainability team

Dialogue

Responses

MATERIALITY ANALYSIS
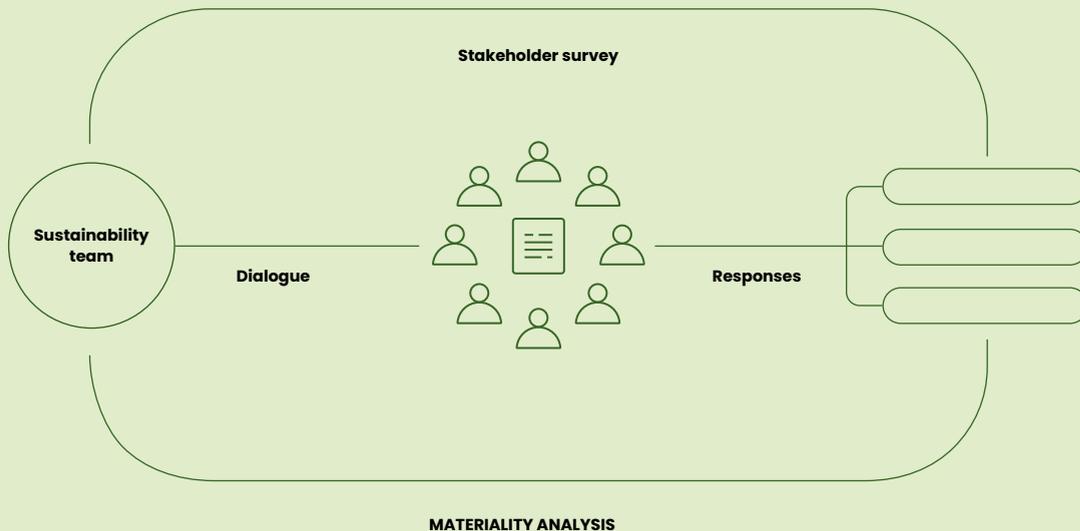
RESOURCES

Stakeholder survey
Includes a template for the person in charge of management with questions to ask the stakeholders.

Selecting indicators and compiling data

Mapping the relevant issues with a high impact on sustainability helps the person in charge of the heritage resource's management to understand where to concentrate their efforts. Now is the time to identify one or more indicators for each important issue in order to set a starting point and track its progress over time.

Indicators are tools for assessing up to what point, or to what extent, the goals set are being achieved.

— They represent a heritage management measurement unit for assessing performance of the relevant issues.

— They compile information to analyse performance in any area of the organisation and verify fulfilment of goals in terms of results.

— They help to prevent and detect deviations in reaching the goals.

The indicators may be measured quantitatively (numeric values) or show aspects of the results qualitatively (description of the result).

We recommend that the indicators are concise, clear, easily measurable and recurring, so that we can track progress easily.

Therefore, it is fundamental to ensure that the information or data needed to measure each indicator selected is going to be available regularly and easily.

It is not always possible to collect data, because there is no protocol or system in place to measure a specific indicator.

What is an indicator?
An indicator is data or a set of data that helps us to measure the evolution of the relevant issues identified.

Definition of own indicators
In order to assess the alignment of the heritage resource with sustainability properly, we suggest selecting a combination of various types of indicators that show the results in a balanced, appropriate manner, and the impact of the relevant issues on each one of the dimensions of sustainable development.

Self-assessment
The following action consists or identifying and compiling data for each one of the management indicators selected.

The array of indicators we propose for the practical approach can also serve as an inspiration and intake for future uses.

The reliability of the data, identification of risks to prevent incorrect reporting and putting controls in place to ensure the quality and integrity of the results are fundamental.

Using this data analysis, we make a self-assessment of the heritage resource's alignment with sustainability, and we get a snapshot of the starting point.

This work does not include a range of admissible parameters, and, so that the first diagnostic is not blind, we suggest comparing the results of other milestones which are reference points for our management in the issue we want to analyse.

How do we identify the positive, negative, potential and actual impacts of the SDGs?
Identify whether the contribution of the SDGs is positive or negative enables an effective action plan to be prepared. We talk about the negative impact when the heritage resource undermines the SDGs (not having accessibility for people with reduced mobility has a negative impact on SDG 10 - Reduced inequalities - and, therefore, the action plan should facilitate access). A positive impact gives alignment with the SDGs (the house-courtyard is, on its own, a natural strategy for refreshing the air, so it has a positive impact on SDG 7. Affordable and clean energy).

In practice.
Creating indicators and compiling data

The 56 quantitative indicators and 49 qualitative indicators proposed for the cultural heritage element are not obligatory, they should provide inspiration for heritage management. One, several, or none can be chosen, in the event that, in the end, the choice is to create some own indicators.

We set out an example of a materiality issue and indicators for measuring its performance below.

CULTURAL HERITAGE	INDICATORS	
Dimension	**People**	
Issue	Dissemination and awareness	
Main SDG Impact	SDG 4 Ensure inclusive and equitable, quality education and promote lifelong learning opportunities for all.	
Qualitative indicators	Does your resource have, or take part in, any outreach and education plan or strategy for sustainability based on cultural heritage? (If yes, indicate which one/ones and a brief description [name, goals, time frame, etc.])	Does your resource have any recognition, special mention or award? (If yes, indicate which one/ones)
	Do you work to innovate and update the content in the heritage resource?	Do you have social networks or other similar outreach and information channels?
Quantitative indicators	No. of outreach and education activities carried out in the past year	No. of outreach channels the heritage resource has
	No. of people who attended the activities carried out in the past year	No. of publications presented in the past year
	No. of monthly publications on social networks and outreach channels	No. of annual visits to the heritage resource.
	Participation rate in the activities carried out compared to the number of places offered	

RESOURCES

Qualitative and quantitative indicators
Access the full table.

Description of indicators
Access the full document.

Defining priorities

On this point, the person in charge of heritage management should have an understanding of their current and potential, negative and positive, impacts on sustainable development. The following action consists of defining priorities using the SDGs.

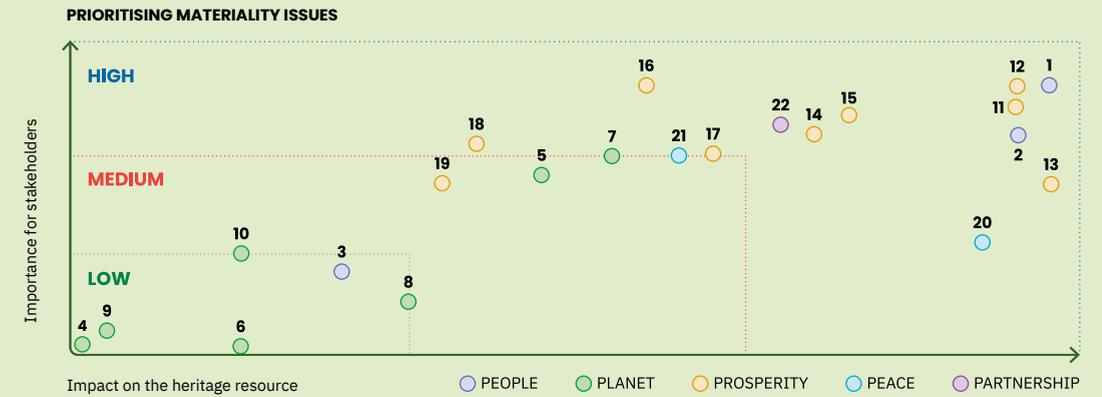We set out some criteria that may help in this process below:

— The size, seriousness and probability of actual and potential negative impacts and the significance of this type of impact for the main stakeholders.

— The possibility of a new regulatory framework, the lack of materials or specialist workforce, pressure fromstakeholders, presentation of new aid, or justification of funding.

— The opportunity for the heritage resource to gain benefits from its positive impacts on the SDGs.

— The assessment of the impacts and determination of priorities are not mathematical processes. They require subjective judgments by the sustainability team.

The materiality process is a dynamic, continuous path involving constant dialogue with stakeholders, with openness and the ability to listen. The observations gathered enrich the cultural heritage resource's strategy and strengthen its positioning.

Over and above this, updated materiality ensures sustainable management because the efforts and resources are allocated coherently to reduce negative impacts and increase the positive ones for people and the planet.

In practice.
Defining priorities

We set out below the priorities for relevant issues at internal level at the heritage resource and for the stakeholders.

PRIORITISING MATERIALITY ISSUES

Importance for stakeholders — HIGH / MEDIUM / LOW

Impact on the heritage resource

PEOPLE   PLANET   PROSPERITY   PEACE   PARTNERSHIP

MATERIALITY ISSUE			
1	Dissemination and awareness	12	Heritage conservation, protection and safeguarding
2	Training	13	Employment and working conditions
3	Public health	14	Sustainable economic management
4	Biodiversity	15	Sustainable tourism management
5	Procurement of services	16	Equal opportunities
6	Circular economy and waste management	17	Investment and funding
7	Sustainable management of water resources	18	Digital transformation
8	Sustainable management of equipment and fittings	19	Users and local community
9	Plant health	20	Ethical management, good governance and transparency
10	Energy transition and climate change	21	Citizen participation
11	Accessibility and inclusion	22	Public/private partnerships and collaborations

RESOURCES

Prioritising materiality issues
The materiality matrix shows the priority of relevant issues for the team in charge of managing the heritage resource and for the stakeholders.
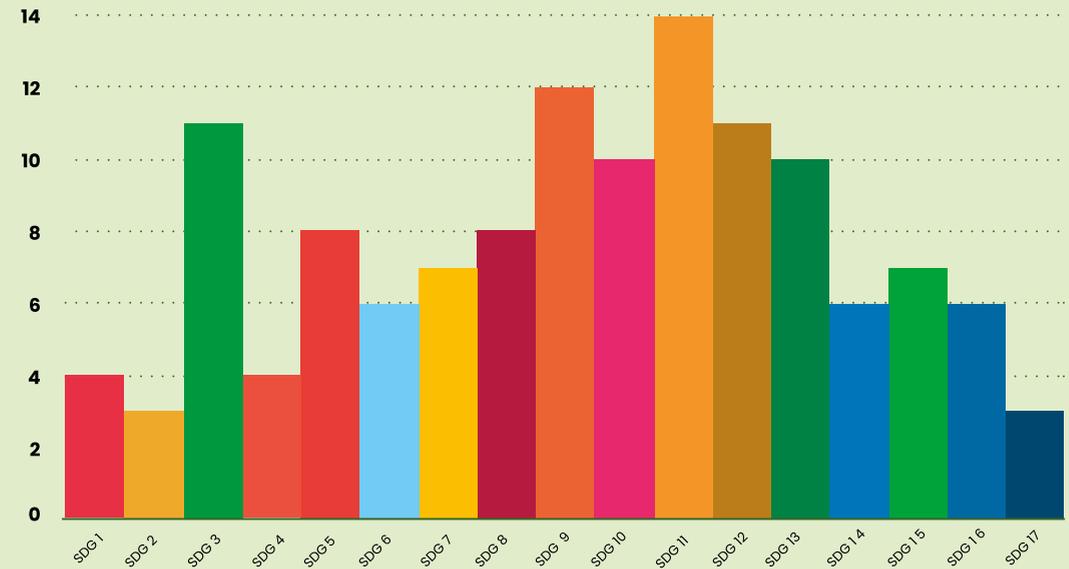
In practice.
How we have an impact and are interconnected

Starting with the materiality analysis, we can establish various readings that will help us to understand and communicate the sustainability of our heritage resource.

MAIN SDG IMPACTS
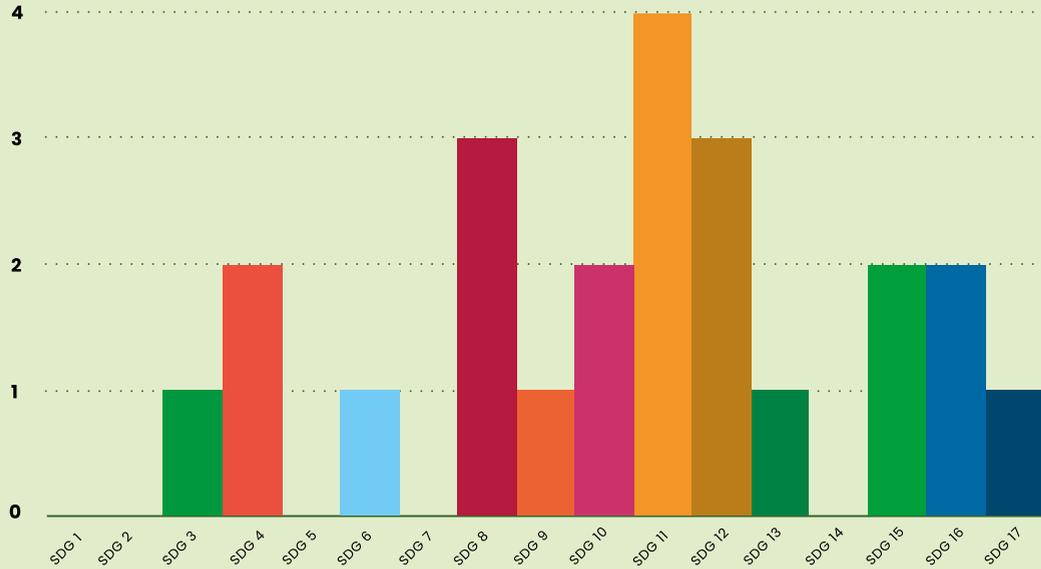
SECONDARY SDG IMPACTS

17 SUSTAINABLE DEVELOPMENT GOALS (SDGs)

SDG 1
End to poverty

SDG 2
Zero hunger

SDG 3
Good health and Well-being

SDG 4
Quality education

SDG 5
Gender equality

SDG 6
Clean water and sanitation

SDG 7
Affordable and clean energy

SDG 8
Decent work and economic growth

SDG 9
Industry, innovation and infrastructure

SDG 10
Reduced inequalities

SDG 11
Sustainable cities and communities

SDG 12
Responsible production and consumption

SDG 13
Climate action

SDG 14
Life below water

SDG 15
Life on land

SDG 16
Peace, justice and strong institutions

SDG 17
Partnerships for the Goals

RESOURCES

Main SDG Impact
Get to know how materiality issues have a direct impact on the SDGs.

Secondary SDG Impact
Get to know how materiality issues have an indirect impact on the SDGs.

Internal coherence between materiality issues
In the same way as the world is interconnected, it is interesting to check our internal coherence with a double entry table to see how our relevant issues are interrelated.

Internal coherence between materiality issues and the SDGs
Using the double entry table, we can do a quick, visual check on the impact of our relevant issues on each SDG.

Setting goals

Setting goals is directly based on the impacts detected in the self-assessment and on prioritising relevant issues in the materiality matrix.

Set an action plan with specific goals, that can be measured and have time limits, help the sustainability team to encourage shared priorities and boost the path to sustainability in the entire heritage resource.

By aligning with the SDGs, heritage resources can communicate their commitment to sustainable development to their stakeholders more effectively.

This step, setting up goals, consists of three actions

ACTIONS

→ **Adopting the "outside-in" approach**
→ **Designing an action plan.**
→ **Announcing the commitments to the SDGs.**

Adopting the "outside-in" approach

The SDGs are the result of an international consensus without precedent on the level of progress that is desired to be achieved on a worldwide scale.

When the heritage resource directs its strategy towards the SDGs from the very beginning, this demonstrates that, with a strong performance, it contributes to reaching the balance between social development, economic growth and environmental protection, at local and global level.

Traditionally, organisations fixed their aspirations by doing a current and historic performance analysis, projecting trends and scenarios, and making a comparison with the competition. However, nowadays, this strategy is not enough to fully address the social and environmental challenges that face us on the planet, as the world is interconnected.

The coherence of development policies is an approach to include the three dimensions of sustainable development at all levels when drawing up national and international policies, in order to achieve more effective cooperation for development.

Therefore, it is important, at the least, to know about the local development agenda and the policies affecting the various tiers of management, because the heritage resource's sustainability should serve not just to solve internal problems, challenges and opportunities, but should also support the goals of the municipal district and area it is in within social, economic and environmental fields.

How does your sustainability plan contribute to development policies?

Global

National

Regional

At local level
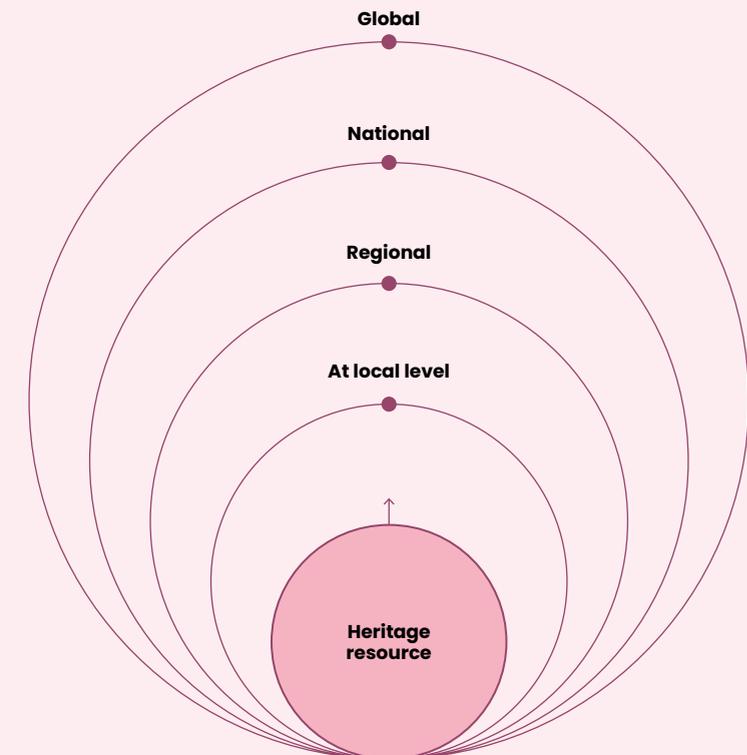
Heritage resource

In practice.
Coherence with development policies

The work carried out by the research team also encourages alignment of the heritage resource's contribution with the various sustainability agendas of the public authorities, which can be highlighted either when the application for aid or a subsidy is made, or for its justification.

RESOURCES

Internal coherence with public policies
Click on the link to find out about the relationship of priority relevant issues in our example for a cultural resource with the United Nations 2030 Agenda, the Spanish 2030 Agenda, the Andalusia 2030 Urban Agenda, Participamos DipuCórdoba 2030 and the Córdoba Agenda.

Designing an action plan

Now is the time to design the sustainability route map with measurable, realistic goals using the materiality matrix defined and the starting point set in the self-assessment.

The action plan we propose creating gives a detailed definition of the path to achieving the targets we set with respect to sustainability.

We suggest including the following fields in the route:

— **Relevant issues:** as we mention in *Step 02 Defining priorities*, the relevant issues are those to be included in the action plan.

— **Priority:** is the resulting importance of the relevant issue in the materiality matrix (high - medium - low).

— **Main goal:** is a general or strategic target for each priority issue in our materiality matrix.

— **Specific goals:** are particular, reachable goals, aimed at achieving the main goal

— **Actions:** proposed to achieve the specific goals and, ultimately, the main goal. The aim is to minimise negative impact and maximise the positive impact of the SDGs.

— **Performance indicator:** is the measure of progress of a specific goal or particular action.

The ideal starting point for selecting Key Performance Indicators (KPI) is the array of indicators used to self-assess our heritage resource in *Step 02 Defining priorities.*

— **Difficulty:** Assess how complicated it is to carry out an action in a range of high - medium - low.

— **Human and material resources:** needed to implement the action successfully.

— **Completion time:** We establish a time frame that each specific goal must be fulfilled in. We can choose between several format options, such as indicating the start and end times, specifying short - medium - long terms, or setting success periods at 1, 3 and 5 years.

In practice.
Action plan

Inspiration for cultural heritage resource managers for an action plan proposed for one of the issues in our materiality matrix.

| CULTURAL HERITAGE ACTION PLAN	
Dimension	**People**
Relevant issue	Dissemination and awareness
Priority	High
Main goal	Foster education and knowledge about the heritage resource
Specific goals	Encourage dissemination and knowledge about the heritage resource for all age groups (from children to the elderly)
Actions	Planning dynamic activities that make the heritage resource known (talks, conferences and games, etc.)
Performance indicator	No of outreach and education activities carried out in the past year
	No of monthly publications on social networks and outreach channels
	Participation rate in the activities carried out compared to the number of places offered
Difficulty	
Human resources	
Material resources	
Completion time	Long term

RESOURCES

Action plan
Access our example action plan showing relevant issues, priority, main, specific goal, actions, performance indicators, difficulty, human and material resources and completion time

In practice.
Internal coherence with our mission, vision and values

Starting with our action plan, we can analyse the main and secondary impacts of the SDGs on the sustainable development dimensions (5 Ps) to show the alignment of the sustainability route map with the ethical, good governance base of our heritage resource.

ACTION PLAN IMPACT ON THE SUSTAINABLE DEVELOPMENT DIMENSIONS

Main and secondary SDG total weighted impact

150
100
50
0

PEOPLE   PLANET   PROSPERITY   PEACE   PARTNERSHIP
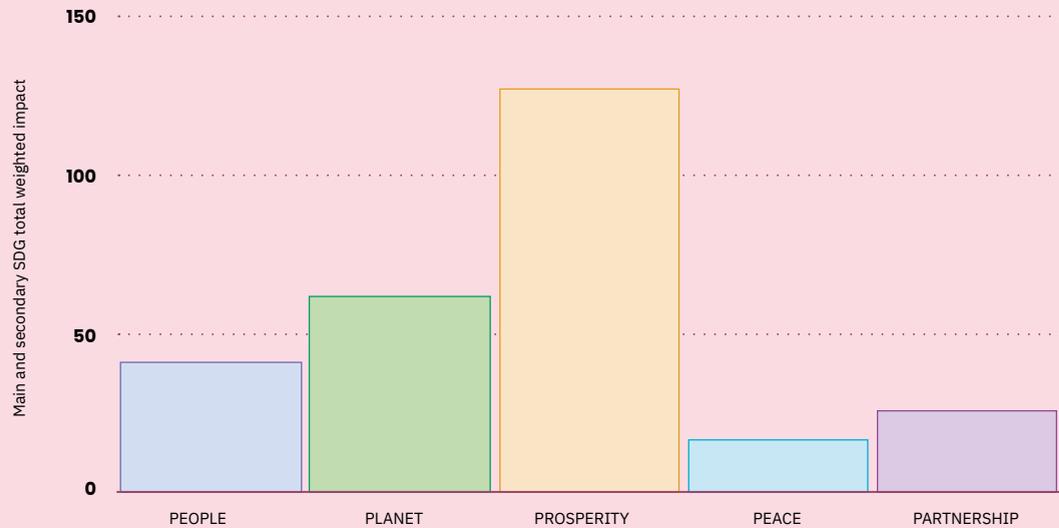
RESOURCES

Internal coherence with our mission, vision and values
Go to the step-by-step guide to how to design the chart above.

Announcing the commitments to the SDGs

Once we have consulted the internal and external stakeholders in our heritage resource to design the relevant issues matrix, we consider that it is fundamental to continue with the strategy of dialogue, sharing our commitment to sustainable development right now.

It is true that making these goals public, apart from benefits, brings risks in the event that the targets are not met within the time set. To manage this possible obstacle, we suggest regular, transparent communication of the activities carried out, progress achieved and the challenges faced.

The person in charge of managing the heritage can, for this purpose, use the resource's usual communication channels, such as a presentation in a press release, social networks, website, e-mail segmented by interest groups, publication on specialist platforms, or having the commitment to the SDGs on-site so visitors can see it.

Integrating

Once we have set out an action plan with goals for each one of our heritage resource's priorities, it is fundamental to integrate the sustainability route map into the possibility of motivating employees to achieve the goals.

Integrating sustainability into a heritage resource could seem like a huge challenge, but it has its rewards, such as improved efficiency and image, and contributing to global well-being.

To achieve the goals proposed and facilitate the change in management, it is important to set up partnerships with other organisations, because sustainability cannot be achieved alone.

In this step, we identify how to integrate the SDGs into the heritage resource with the following actions:

ACTIONS

→ **Anchoring sustainability goals in the heritage resource.**
→ **Integrating sustainability into all functions.**
→ **Taking part in partnerships.**

Anchoring sustainability goals in the heritage resource

Active leadership is key to the management and the technical team at an entity for successful achievement of any kind of significant organisation change. We do not just have to deal with integration of the sustainability goals into the heritage resource. It may also be that the importance of sustainability has not been fully understood by all parties.

Other cultural heritage resource initiatives
In the Bibliography section, we have included examples of leadership of heritage milestones that have already integrated sustainability into their management, and which were an inspiration to use when putting this guide together.

We propose that heritage management assesses the following principles, to ensure that the sustainability goals are solidly anchored in its institution.

— **Make the SDGs known and create awareness** at the entity about the value of sustainability.

— **Foster dialogue and transparency** at the internal level with all the parties involved. Share the heritage case so that people can understand and take in how to progress towards the sustainability goals.

— **Sustainability** must be an **integral part of the whole system of strategic, operational and financial goals**. All areas must have their own sustainability goals.

— Integrate **sustainability goals into performance reviews and remuneration systems** for the entire team at the heritage resource.

— **The commitment to sustainability** should also be reflected in the mission, vision and values of the heritage element, as it is in this way that we link the future success of the heritage resource transversally with sustainable development.

Integrating sustainability into all functions

Apart from the sustainability team, it is essential that the entire internal structure understands and has a sense of belonging, because they take part in the essence of the cultural heritage resource: management processes, conservation of unique elements, maintaining infrastructures, planning and programming.

A person or team in charge should be appointed to perform each activity on the sustainability route map successfully.

It should be taken into account that, depending on the sustainability goals set, some functions will be more important than others.

Furthermore, depending on the cultural heritage element's type, ownership and management model, some goals will have additional difficulty in being performed in due time and form. For example, the person in charge of management may only have limited independence, or even not have the power to recruit human resources or suppliers.

This peculiarity of heritage involves one of the huge challenges for heritage management, that faces the task of incorporating the essence of the SDGs transversally into their resource.

In all cases, individual responsibility for progress with the targets and goal is essential in achieving success.

In practice, in many situations, a consensus must be reached with the stakeholders outside of the scope of the cultural heritage resource itself.

It is also the time to appoint the person in charge of achieving each specific goal in the action plan, who must measure and report on the process regularly.

It is, therefore, essential to design integration protocols with a dashboard, schedule and monitoring and control procedures.

In practice.
Integration protocols

By way of inspiration for heritage management, we propose two procedures for integrating the sustainability route map into the cultural heritage milestone.

Sustainability
route map

Monitoring sheet

Sustainability route map
See the action plan, that also includes the person in charge of each action.

Monitoring and control template
Access a sample monitoring and control template for each activity in the relevant issue on the materiality matrix, classified by the same term or estimated completion time (short - medium - long).

Taking part in partnerships

To effectively address sustainability issues, it is essential to enter into partnerships with different players who centre their strategy and work on people and the planet, because, in this way, we share principles and values.

This criteria for the value of collaboration is, specifically, the basis of SDG 17 Partnerships for the Goals.

— In general, when it comes to managing a cultural heritage element, the following may be of value:

— Association with universities, businesses and heritage reference points that share knowledge, experience, resources and technology to provide new solutions to the challenges we face.

— Initiatives in the cultural heritage and tourism sector that are backed up by the institutions in an effort to raise standards and practices towards sustainability.

— Local and regional sustainable development plans and agendas led by public authorities for multi-player, or joint, action in the area (government, public and private sector, and civil society organisations).

— The local community, via neighbourhood associations or citizen participation, with projects promoting progress, social cohesion and driving community life in the neighbourhood.

The SDGs can help to bring together member institutions with the same goals and priorities.

In order for a partnership to be successful, commitment is needed from all of its members.

It is important to set shared goals amongst member institutions, take advantage of their respective basic skills, de-politicise projects, set up clear coordination and working structures, create a monitoring framework, concentrate on the results, detect needs and seek resources, and design a process for knowledge management.

Reporting and communicating

In this final step, we are going to disseminate corporate sustainability, because it is important to report and communicate about our progress in relation to the SDGs regularly, to respond to the stakeholders' expectations.

"If it's not communicated, it doesn't exist". Communication of the progress towards the SDGs is an example of transparency and responsibility that improves the heritage resource's public image and, therefore, its reputation. User preferences are increasingly based on sustainability criteria. When the resource reports about its contribution to sustainability, this can, therefore, become an advantage. Moreover, communicating contributions to the SDGs is a source of motivation for the entity's personnel, particularly for those identifying with environmental and social values, giving them a shared purpose and a sense of belonging.

It is not just important to communicate, setting out how the communication will be made is too. A good report should include a diagnostic of how the heritage resource is currently aligned with sustainability and a plan for actions that demonstrate its commitment to people and the planet in the future.

This step describes the values to be taken into account for reporting and communicating:

ACTIONS

→ **Communicating performance in relation to the SDGs.**
→ **Sustainability and progress report structure.**

Communicating commitment to the SDGs

The SDGs provide a common language for heritage elements to communicate their contribution to sustainable development.

Many entities already report and communicate about matters included in the SDGs, such as climate change, sustainable water management and decent employment and work.

By aligning the reports and communications with the SDGs, the stakeholders can assess the heritage resource's performance within the context of the targets set by the SDGs and, in this way, ensure common dialogue using the language of the SDGs.

For each SDG identified as being relevant, heritage resources can share worthwhile information, such as:

— Why the SDG has been identified as relevant, how it was selected during the process of prioritising issues, and how the stakeholders have taken part.

— The significant impacts in the SDGs, both positive and negative.

— The relevant goals set by the SDGs and the progress attained in achieving them.

— The strategy for integrating the sustainability route map and the SDGs into the heritage resource.

— The performance indicators defined by the heritage resource in the process of impact assessment and setting goals.

The SDGs include the social, economic and environmental aspects that we face in the world, and seek to achieve balance in sustainable development.

As the planet is interconnected, heritage resources will also benefit from explaining the links between the relevant issues in their management.

For example, some important matters, such as health, sustainable consumption and production, and gender equality, can be seen in several SDGs. It could be useful for the heritage resource to make known how progress in one area has contributed to progress in the others.

Sustainability and progress report structure

This guide proposes an independent report, that is specifically for heritage resources, but uses internationally recognised standards for sustainability report preparation processes.

For our proposed sustainability and progress report structure We took into account the Ten Principles defined by the Global Reporting Initiative standard (better known as GRI) for preparing sustainability reports: stakeholder inclusiveness, sustainability context and the SDGs, materiality, completeness, balance, comparability, accuracy, timeliness, clarity and reliability.

These principles are useful for preparing sustainability reports, as well as for communications in general.

We consider that an effective report demonstrating the heritage resource's progress in contributing to achieving the SDGs should include the following elements, that include its ethical and **good** governance bases:

— **Categorisation of the heritage resource:** name, type, ownership, management model and full address.

— **Letter of undertaking:** from the heritage resource concerning its contribution to the SDGs.

— **Mission:** description of the historical, cultural and natural legacy of the heritage resource to humanity and its contribution to promoting peace, **sustainable social**, environmental and economic development.

— **Vision:** the targets of the heritage element are in a specific period of time, also including where we want to get to in relation to sustainability. Vision is a long-term target that we review and renew over time.

— **Values:** these transmit the heritage element's operational principles. They are the attitudes and practices brought together as a team, and reflect the way relations are developed along the road to sustainability.

— **Organisation Chart:** shows the internal structure of the heritage resource and its contact details.

— **Analysis of the stakeholders** as identified in *Step 02 Defining priorities*: a brief description of the stakeholders who are directly, or indirectly, affected by the activity at the heritage resource.

— **Diagnostics:** putting the starting point of the heritage sustainability goal into context. We suggest including the materiality matrix and the graphics proposed in the practices in *Step 02 Defining priorities*.

— **Sustainability route map:** action plan developed in *Step 03 Setting goals*, also indicating, in this case, the department or person responsible for each action proposed.

— **Outreach:** using S*tep 03 Setting goal*s, give a generic description of the communications channels we are going to use to broadcast our commitment to the SDGs to stakeholders.

In practice.
Communicating our commitment

As mentioned previously, sharing our progress with sustainability is essential, not just to confirm the progress of the heritage resource itself, but also so that the various stakeholders get to know about the measures being taken and the commitments made. Therefore, we propose the following resources by way of inspiration for heritage management:

RESOURCES

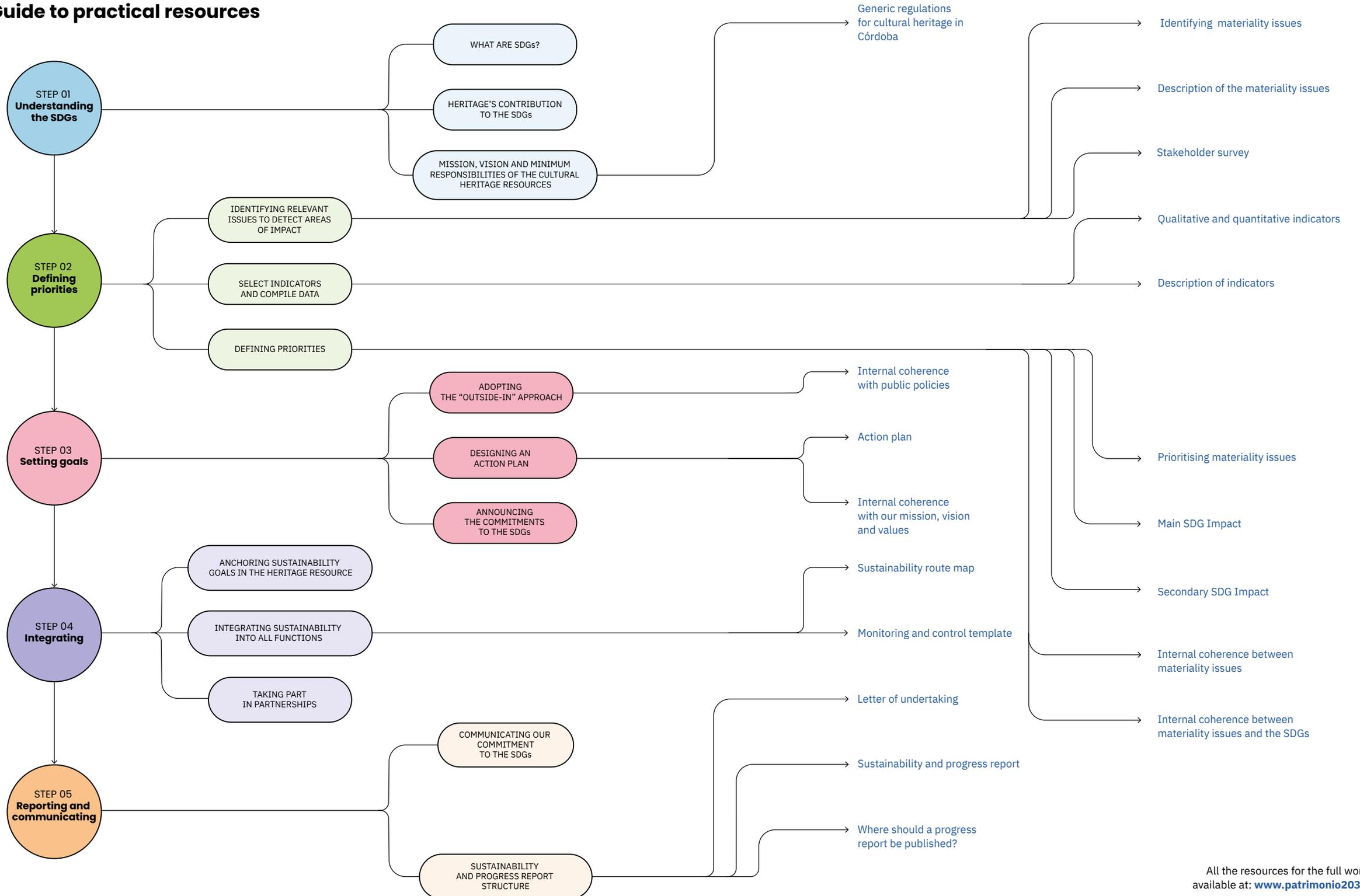**Letter of undertaking**
Go to the proposed template.

Sustainability and progress report
Go to our example template.

Where should a progress report be published?
Find out about our ideas for places where your commitment can be made known.

Guide to practical resources

STEP 01
Understanding the SDGs

- WHAT ARE SDGs?
- HERITAGE'S CONTRIBUTION TO THE SDGs
- MISSION, VISION AND MINIMUM RESPONSIBILITIES OF THE CULTURAL HERITAGE RESOURCES

→ Generic regulations for cultural heritage in Córdoba

→ Identifying materiality issues

→ Description of the materiality issues

→ Stakeholder survey

STEP 02
Defining priorities

- IDENTIFYING RELEVANT ISSUES TO DETECT AREAS OF IMPACT
- SELECT INDICATORS AND COMPILE DATA
- DEFINING PRIORITIES

→ Qualitative and quantitative indicators

→ Description of indicators

STEP 03
Setting goals

- ADOPTING THE "OUTSIDE-IN" APPROACH
- DESIGNING AN ACTION PLAN
- ANNOUNCING THE COMMITMENTS TO THE SDGs

→ Internal coherence with public policies

→ Action plan

→ Internal coherence with our mission, vision and values

→ Prioritising materiality issues

→ Main SDG Impact

STEP 04
Integrating

- ANCHORING SUSTAINABILITY GOALS IN THE HERITAGE RESOURCE
- INTEGRATING SUSTAINABILITY INTO ALL FUNCTIONS
- TAKING PART IN PARTNERSHIPS

→ Sustainability route map

→ Monitoring and control template

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STEP 05
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All the resources for the full work are available at: **www.patrimonio2030.org**

INDEX

Glossary

Accessibility: is considered to be a form of inclusion. When a resource is accessible, it means that any user can use it. Accessibility can be cognitive, physical or sensory.

Action plan: is an instrument that, using strategic lines and steps for action, enables those responsible for management to reach the goals.

Agent for change: as the name indicates, is a person seeking transformation by starting up actions, strategies or mechanisms that enable this transformation to be improved and achieved.

Allergen level index: a tool used to count and communicate the allergen levels in the air in a specific area during a particular period of time. These indices are useful for people suffering from allergies, as they mean they can be informed about the levels of allergens present in the surroundings, and take preventive measures to prevent or reduce allergic symptoms.

Capability Theory approach: proposed by Sen, this includes elements that were previously excluded from the assessment of a community's development. It establishes that development does not only happen when financial stability is achieved but should also take into account the well-being and quality of life of the individual.

Communal house: typical architecture of community housing where several families share communal spaces and live around a courtyard, within the same property.

Courtyard house: typical architecture where the house is arranged around a courtyard.

Courtyard Competition and Fiesta: according to the UNESCO declaration: "For twelve days at the beginning of May, the city of Córdoba celebrates the Fiesta of the Courtyards. The fiesta includes two main events: the Courtyards Competition and the Córdoba Courtyards Fiesta. The competition awards various categories of prizes depending on the plant and flower decoration of the courtyards, grilles and balconies. The courtyards taking part in the competition are open to the public during the entire festival. This consists of shows, mainly organised in the largest courtyards, where traditional Córdoba songs and music are played, particularly flamenco song and dance. Neighbours, along with their families and friends, get together to decorate the courtyards, which become places for relaxation and group celebrations where everyone gets together to eat and drink. The Córdoba Courtyards Fiesta promotes the function of the courtyard as an inter-cultural meeting place and encourages sustainable way of collective life, based on setting up solid social links, solidarity networks and exchanges between neighbours, while at the same time stimulating the acquisition of knowledge about, and respect for, nature".

Cultural and creative industries: are those related to activities based on artistic expression and cultural values.

Corporate sustainability: is a long-term management strategy. It is considered to be an added value, given that it seeks management that takes fundamental elements of sustainable development into account, such as equity and social justice, protection of the environment and economic development.

Corporate Social Responsibility: is a way of managing an element or resource, taking into account the impact that our activities have on the surroundings, as well as on the stakeholders, and the social, economic and environmental context.

Clean energy: refers to any kind of energy that, when produced, does not generate any type of pollution, whether this is due to greenhouse gas emission or waste.

Damping capacity: is the function of an element attenuating noise and minimising its impact on the interior space.

Load capacity: is the proportional limit on visitors to a space, so that it does not lose its identity and cultural values

Densification: this concept has been used by governments and many international organisations to resolve the problem of unregulated demographic growth and take maximum advantage of potential areas for housing.

Decade of Action: was set so that by 2030 the achievement of the SDGs should have been reached, which means that is the remaining to achieve fulfilment of the 2030 Agenda. All interested parties are urged, during these ten years, to create alliances and intensify efforts to achieve fulfilment of the Sustainable Development Goals.

Development programmes: have the goal of meeting and improving the standard of life of people in the places where they are carried out.

Diagnostics Indicator: is a quantitative and qualitative measuring tool that enables us to assess the initial status of the specific aspect the indicator is used on. It must be precise, easy to measure and in line with the body's specific activity, as the purpose of using it is to mark a starting point for sustainable management.

Economic performance: The United Nations defines economic performance as a contribution to sustainability's economic area based on inclusive, sustained economic growth that can boost progress, create decent employment for everyone and improve standards of living.

Environmental performance: environmental performance is the measurable result of the actions taken by an organisation to reduce its environmental impact and manage natural resources sustainably. It can be assessed using indicators such as polluting emissions, energy use, climate change, and product innovation, amongst others.

Fields of sustainability: sustainable development has three areas, also known as the pillars of sustainable development, which related transversally amongst each other, and are social, economic and environmental. Sustainability is a concept of balance that is sought in each field, taking the social, economic and environmental idiosyncrasies, respectively, into account in relation to an optimum, respectful, and, definitively, appropriate global scenario.

Financial goals: like the previous ones, are milestones, but focus on the economic aspects.

Gentrification: is a process of urban space renewal that gives it added value, making it attractive to a certain sector of the population, typified by having greater purchasing power, which, due to the higher cost of living, means the original population has to pull out to live in remote areas UN-HABITAT defines this as "an urban renewal and reconstruction process that goes hand-in-hand with an influx of middle or high class people who usually push out the poorest residents in the areas of action".

Good governance: although there is no international consensus on the definition of "good governance", the United Nations indicates that its meaning could cover the following features: complete respect for human rights; the Rule of Law; effective participation; associations with multiple stakeholders; political pluralism; transparent processes and institutions that are accountable; an efficient, effective public sector; legitimacy; access to knowledge, information and education, political empowerment of the general public; equity, sustainability, and actions and values that encourage responsibility, solidarity and tolerance.

Global Reporting Initiative: also known as GRI, corresponds to a non-profit organisation that supplies tools to show, and give account of, impacts on matters relating to sustainability, the environment and the economy.

Heritage: UNESCO defines heritage as all resources inherited from the past, created in the present and transmitted to future generations, covering tangible, intangible and natural resources.

Heritage community: in 2005, the Council of Europe approved the "Faro Convention" that set out the relationship between heritage and its social value, and introduced the term heritage community which "consists of people who value specific aspects of cultural heritage which they wish, within the framework of public action, to sustain and transmit to future generations" and which establishes sustainable ties within them.

Heritage managers: are individuals whose purpose is heritage resource management. Their duties are transversal and may cover several disciplines, such as material and human resources management and cultural marketing, etc. They also have expertise in the heritage resources they manage.

Heritage resources: in our guide, we have taken cultural heritage, green/urban heritage and courtyard houses into account. They are tangible or intangible assets that shape the identity of a society.

Human Rights: are the intrinsic rights of each individual, regardless of their age, gender, religion or race. The United Nations considers them to be universal, indivisible and non-discriminatory. They include fundamental rights, for which reason they must be respected, procured and their compliance guaranteed.

ICOM: International Council of Museums. This is an international organisation whose purpose is to place value on and conserve heritage in its various forms.

ICOMOS: the International Council on Monuments and Sites is a non-governmental organisation associated with UNESCO that works for the valuation, conservation and protection of monuments and sites, just as its name says.

Impact measurement: using indicators and a structured methodology, the consequences of present or planned actions are measured to identify to what extent they impact on the social, economic and environmental areas.

Inclusion: is the integration of everyone in society. It means that users all have the same opportunities and rights.

Indicators: are assessment elements that enable assessment of the performance or progress in achieving a specific purpose. There are various types of indicators which are chosen depending on the needs of each step. Nevertheless, all indicators must be measurable, clear and easy to identify.

Materiality matrix: is a tool used to show the relative importance that materiality issues have on management. It is carried out with participation by the stakeholders. It is normally shown as a scatter plot, and is a resource that is highly visual and easy to interpret.

Materiality analysis: is a diagnostic process enabling localisation of the most important matters in a heritage resource, as perceived by the interest groups and the resource itself. The relevant issues are the key aspects to getting to know which actions should be taken to achieve the implementation of sustainability at our heritage resource. It is advisable to refer to standards to identify the matters where importance should be questioned.

Materiality: for any body or organisation, materiality refers to all environmental, social and governance aspects that have a positive or negative impact on its activities and on its stakeholders, whether in profitability, competitiveness, environmental impact and social responsibility, etc.

Materiality issues: also called, more intuitively, "Relevant issues", are specific matters that need to be studied in the materiality analysis, which must include environmental, social and governance aspects that have a significant influence on an entity's activity and on its stakeholders.

Millennium Development Goals: adopted in 2000 during the Millennium Summit and ratified in the Millennium Declaration. This set out 8 goals and 17 targets, as well as a series of indicators to measure progress. The goals sought to fight extreme poverty, reduce infant and maternal mortality, and reduce disease transmission and the risk of epidemics. The SDGs were centred on international cooperation, given that they were solely aimed at developing countries.

Strategic goals: these are part of the planning of a resource. They set out the aims that are intended to be accomplished within a specific timeframe and the steps that must be taken to accomplish them.

Multi-actor partnership: The United Nations defines this as a cooperative relationship between various stakeholders who have the same aim. To do so, they act by adjusting their actions and strategies to the benefit of the interested parties and maximise the "creation of value" in the context of the Sustainable Development Goals.

Multi-level partnership: just like the multi-actor partnership, this is a collaborative relationship. However, it occurs at different levels of governance, whether national, regional or local, to achieve the targets set.

Natural heritage: the 1972 Convention Concerning the Protection of the World, Cultural and Natural Heritage defines natural heritage as, "natural features consisting of physical and biological formations or groups, which are of outstanding universal value from the environmental, aesthetic or scientific point of view"

Negative impact: we talk about negative impact when an action's impact damages a particular area of sustainability: damage to the environment, damage to the social domain, or damage to the balance of the economy.

Operational goals: are milestones that are set in a specific term and are intended to contribute to achieving a final purpose.

"Outside-In" focus: prior to implementing any action or measure, it is necessary to be aware of the needs themselves, the state of the matter and the framework our management is performed in, in order to develop strategies that are framed within a viable action plan with a real impact. This assessment enables the contribution of local action to global plans to be shown, demonstrating that all the initiatives are connected and that our actions are aligned with sustainability.

Participation report: compiles and summarises participation by individuals, groups or bodies in an event, project, activity or specific process. This type of report gives key details about which people were involved, to what extent they took part and what their contributions or input were during the period specified.

Performance indicators: known as performance indicators or KPI (Key Performance Indicator). These are a set of data enabling assessment of whether the actions taken within the process are efficient enough to achieve the goals acquired in a specific timeframe.

Political coherence: procuring that the actions or measures taken go in the same direction and are compatible with the various levels of management, enabling a model framed in sustainability to be created.

Positive impact: we talk about positive impact when an action's impact benefits a particular area of sustainability: benefiting the environment, benefiting the social domain, or benefiting the balance of the economy.

Potential Impact: a potential impact is initially, or apparently, neutral, but working on an action that is not obviously beneficial or damaging, it may become so.

Qualitative indicators: are a set of measuring tools focussing on the quality or description of the service or action.

Quantitative indicators: are data that give a numerical result.

Practical approach: complements the theoretical approach. It serves to present experiences and results obtained when applying this guide to a heritage resource.

Route map: is a document setting out a "panoramic image" of a project or strategy. It describes the steps that must be followed to fulfil the aims and goals taken on at the start of a plan, programme or project.

Social cohesion: refers to the level of integration and connection that a society group has within a community. The greater the level of social cohesion, the greater the mutual understanding within the heart of the population.

Soil permeability: is the property the soil has that makes it possible for a fluid or liquid to move through it without affecting its structure.

Solidarity network: is a space where associations or bodies collaborate and participate to set up measures, actions and tools that promote social development.

Social performance: according to the Poverty Probability Index, social performance is defined as the practical application of a body's mission and vision to the values of a society. Therefore, social performance describes how well a specific organisation is achieving their mission, or company purposes.

SDG Compass: is a guide aimed at the business sector, with the purpose of serving as a tool enabling all the actions and strategies set in motion to be aligned sustainably. It also gives information and the processes for assessing and quantifying the impact on the SDGs.

SDG localisation: The Sustainable Development Goals mark scheduled targets in the 2030 Agenda. To achieve these targets, each contribution must be localised. This means observing the relationship of the surrounding environment with each SDG to get to know what the current status of impact and contribution is, and go in a direction that is coherent with reality, that enables effective progress in social, economic and environmental sustainability matters.

Sustainability: In 1987, the United Nations Brundtland Commission proposed this concept, which refers to the ability to meet current needs without jeopardising the capacity of future generations to meet their own needs. This sustainability involves responsible consumption of current resources, while ensuring those that will be needed in the future.

Social development: seeks to put human beings at the centre of decision making and, therefore, be able to improve their standard of living and meet basic needs.

Sustainability and progress report: is an instrument that is considered to be an added value for the heritage resource. It involves a commitment to sustainability and enables accounts to be rendered to the heritage resource itself and to the stakeholders, showing the progress with the application of the SDGs.

Sustainable tourism: is a type of tourism that tries to minimise impact on the environment and the recipient community, taking into account the social, economic, political and environmental dimensions that the various tourism activities have an effect on

Sustainable Development Goals: also known by the initials SDG. These make up the 2030 Agenda with 17 goals and 169 targets. These, in turn, have 244 indicators which make it possible to measure progress. They were adopted by 193 member countries in September 2015, with the intention of meeting them, in their entirety, by 2030.

Sustainable development: at its beginnings this was solely associated with natural and experimental sciences. However, in 1987, the United Nations General Assembly set up the Brundtland Commission, which defined sustainable development as progress that meets current needs without jeopardising those of future generations. Sustainable development has three pillars: economic, social and environmental.

Stakeholders: are interested parties or bodies who are affected by the decisions made by the resource. The decisions made and actions carried out may affect them directly or indirectly, and, therefore, it is fundamental to take them into account when it comes to decision making, as they are also considered to be an essential element within the sustainability strategy. They include employees, shareholders, supplier companies and visitors.

Theoretical approach: provides the data and information enabling the guide to be understood in an ordered manner.

The Ten Principles of UN Global Compact: are the values that all businesses deciding to sign up to the Global Compact must apply to their management. These principles are classified into four areas: the environment, human rights, employment rights and anti-corruption.

UNESCO: is a speciality organisation within the United Nations. Its fields of activity are education, culture and science through which it seeks peace and security.

United Nations: was founded in October 1945, at the end of the second world war, with ratification of the United Nations Charter. Its work centres on peacekeeping, promoting social development, procuring the effective observance of human rights and preventing armed conflicts. There are currently 193 member countries.

United Nations Development Programme: also known by the initials UNDP, is considered to be the U' development agency.. Its work focusses on promoting development in various countries and achieving equitable progress, which makes it an essential part of accomplishing the Sustainable Development Goals.

United Nations Global Compact: is an initiative by the United Nations that seeks collaboration from the business sector to implement social responsibility and contribute to achieving the 2030 agenda.

Urban green: Urban green consists of urban green areas, and urban green infrastructures, etc, the entire network of natural and semi-natural spaces that have been planned and managed to protect biodiversity and provide society with ecosystem services within the urban.

Universal Declaration of Human Rights: is a resolution adopted by the United Nations in 1948. It is an ordinance that talks, for the first time, about individuals' rights and liberties, which must be guaranteed, unconditionally. The declaration covers social, economic, political and cultural rights.

World Business Council for Sustainable Development: made up of the main businesses worldwide, its purpose is to intensify measures to achieve sustainability. It provides tools to other businesses so they can target their actions at achieving sustainable development.

Wage gap remuneration register: is a tool that has the aim of reducing the wage difference between men and women. This register ensures compliance with equality plans as it gives data about average values for salaries, wage supplements and bonuses received broken down by gender. In this way, it presents and makes clear whether there are inequalities, or not.

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INDEX

Where can I find more information?
On our website www.patrimonio2030.org - you will find all the resources that will help your heritage resource to align its strategy with the SDGs.

The Patrimonio 2030 website includes:
The documents of the three volumes of this complete work in digital format. "Guide to activating the cultural heritage resource in the SDGs", Guide to activating urban green heritage in the SDGs", and "Guide to activating the house-courtyard in the SDGs".

The resources developed by way of inspiration to facilitate the practical approach to each one of the three books during management-

Glossaries of the terms, relevant issues and indicators.

A description of using the tools to create the charts suggested.

Good practices: sustainability and progress reports for cultural heritage resources, urban green heritage and house-courtyards, that have used our guide to carry them out.

More information:
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