ETHICAL PRINCIPLES OF HERITAGE PRESENTATION FOR WORLD HERITAGE SITES

I. SHALAGINOVA
Brandenburgische Technische Universität Cottbus
Erich-Weinert-Str. 3, 314-3
03046 Cottbus
Germany
shalaginova@yahoo.com

Abstract. This paper recommends a set of ethical principles for heritage presentation. It argues that heritage presentation is a problematic area, which receives diverse attention in various countries and seeks to build professional ethics for heritage presentation in order to enhance its credibility.

Heritage Presentation Dilemma

Ever since the adoption of the Convention Concerning the Protection of the World Cultural and Natural Heritage (UNESCO 1972) much has been done for the preservation and conservation of natural and cultural heritage of an outstanding value. At the same time, the convention also underlines the need not only to conserve but also to present heritage, therefore, the terms appear together throughout the Convention in the phrase "protection, conservation and presentation of the cultural and natural heritage" (see Articles 4, 5, 6, 13, 22, 24, 26). The very name "World Heritage" points out that a site has not only national importance but is also of a specific importance to other cultures and nations. World Heritage Sites embody cultural values of the people on whose territory they are situated, and often the significance of the site is obvious to them without particular presentation or explanation, as it is a materialization of their traditions and customs. For others, coming from a different cultural background, the significance of a World Heritage Site is not readily obvious and needs to be explained and presented in order to enhance the enjoyment, respect and appreciation of the site. Isn't it our moral responsibility as heritage professionals to present a World Heritage Site in a way that it can be equally enjoyed by people regardless of their cultural background?

Four decades after the adoption of the convention it is clear that considerably less attention is being paid to presenting heritage if compared to activities carried out for its preservation. It is a logical consequence – in order to present something it has to be preserved, restored or conserved at first. But practice also shows that even when the physical condition of a World Heritage Site is no longer threatened or in need of immediate preservation, a great amount of sites, or rather their management team, still do not pay a due attention to presentation. Unfortunately in many developing countries, for example Ukraine, heritage presentation is not even considered to be important for a World Heritage Site. Personal interviews with heritage professionals have shown that physical preservation of a site takes priority and everything else is secondary.

To make the matter even more complicated, there is no unanimous agreement among heritage professionals as to the concept of heritage presentation. In order to achieve a clearer understanding for the reader, the following definition is offered: **Heritage Presentation** is a communication process designed to convey the significance of a heritage site to visitors and local communities in order to increase public awareness, enhance understanding of a heritage site and acquire public support in the activities directed at its management and preservation. In this context heritage presentation includes interpretive activities and public activities directed at raising awareness of a site and its significance.

Experience shows that the approaches and levels of heritage presentation differ from country to country and from site to site. Some sites offer a great variety of presentation programmes involving various senses which are developed for different levels and ages, others believe that guided tours and interpretation panels are all that is necessary to present a site. One of the reasons for this discrepancy can be the lack of professional ethics in the field of heritage presentation. When we consider the field of conservation, professional ethics has already been established there, and there are several published statements on conservation ethics from international bodies such as the International Committee of Museums (ICOM) and the International Council on monuments and Sites (ICOMOS) (see, for example, AIC 1979; ICOMOS 2004; UKIC 1983). Professional ethics in the field of heritage presentation, on the contrary, is still being established, thus, it is

necessary once again to point out the important ethical principles in this field.

Ethics in the Heritage Profession

Care for World Heritage not only creates a sense of greater social identity but also places extra responsibilities on heritage professionals, who have to deal with a wide and more diverse audience, balance the needs and interests of various stakeholders and integrate contemporary uses of the site with respect to its significance and authenticity. This and the constantly changing environment in which heritage sites operate, increases the need for maintaining high ethical standards in a heritage profession.

Ethics, as a branch of philosophy on human conduct and good life, in museums and heritage sites is traditionally viewed to measure the values at the personal and professional levels (Scheiner 1997) and to define a set of guidelines for personnel behaviour. At the same time, Edson (1997) points out that it is also important in the process of decision making.

McNaughton and Rawling (2007) identify three areas of moral thought – options, duties of special relationship and constraints – which are present in every decision we make. "Options" underline the fact that there are limitations in maximizing the good and helping less fortunate on the expense of one's own good. There is nothing wrong in pursuing ones own benefits. "Duties of special relationship" underline the importance of obligations towards ones close or related to us. Therefore, "... it would be wrong to neglect our children, even if we could thereby do slightly more good for other children" (McNaughton and Rawling 2007:32). "Constraints" refer to prohibitions in relation to what we may do.

Let us consider those moral categories on an example of a heritage site, whose management decides to maximize its revenues through offering its premises for various events. The management has to consider various options, like whether or not to allow modern events (e.g. pop or rock concerts) at the site, when they do not correspond to traditional historic functions of the site. It would also have to consider constrains and duties as an educational establishment. Despite the great revenue which a pop concert might bring, care for the site has to be on

the main priority and it determines the type of a concert, the way it is organised, promoted and managed.

The three moral categories previously mentioned are always present in our decisions, and every single person makes meaningful combinations of them. Consequently, there are no universal rules for decision making as it is a contextual process to a greater degree. The three areas of common thinking mentioned above help to understand the complexities of decision making at heritage sites. The matter becomes even more complicated when we take into account that every person has his or her own established set of values determined by education, religion, and culture that he or she grew up in. Therefore, professional ethics helps to guide personnel in their everyday decisions, and provides them with a set of principles which have to be considered before an action is completed or a decision is taken.

Even though the Codes of Ethics developed by ICOMOS and ICOM provide general guidelines for personnel behaviour in a museum or at a heritage site, Edson emphasizes that "ethical concerns ought to be common to all areas of the museum" (1997:12). The purpose of this article is to establish a set of ethical principles in an area of heritage presentation, with the aim to give more credibility to heritage presentation by identifying common direction and fulfilling it in a more unified and holistic manner.

Principles of Heritage Presentation

The following eight principles of heritage presentation have been derived from interpretation principles developed by heritage practitioners and the ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites (ICOMOS 2007). They have been further grouped into the four areas of professional ethics related to heritage presentation.

1.   RESPECT FOR THE AUDIENCE

One of the ethical principles universally accepted is respect for others. In our case, it is the audience to a World Heritage Site who deserves to be informed about the significance of the site in a way that stimulates information acquisition and is thought provoking. The

following principles could help to develop a heritage presentation programme with respect and care for our audience.

Relevant – heritage presentation has to relate to the visitors' knowledge and experience thus making it meaningful and personal. Information presented should correspond to the visitor's interests, which is surveyed by periodic visitor audits.

We should not treat visitors as empty vessels which can be filled with information. Visitors attending heritage sites usually have certain background knowledge, including the knowledge of the site and the expectations as to the experience they want to have. Every bit of information is filtered through that personal scope of knowledge and experience and is selected as relevant or irrelevant. In cases where heritage presentation is capable of relating the information to personal experiences, the chance that it would be accepted and remembered by the visitor is much greater (Tilden 1977; Ham 1992). It is preferable to provide information with different levels of difficulty, so that the audience may choose the information that corresponds to their knowledge as "no one likes to feel intellectually inadequate to understand what they experience" (Dean 1997:219). The audience should also be given the possibility to make meaningful connections between information, because things that people discover for themselves prove to be the most memorable (Wearing and Neil 1999).

Entertaining – information about the site should be presented in a captivating and provoking way, which would attract visitors' attention and motivate them to learn some facts about the site.

We should not forget that visitors to heritage sites are mainly seeking enjoyment and not instruction. Therefore, we should respect their desire to have a good time at the site and aspire to satisfy it through a heritage presentation programme. Even though entertainment is not the goal of heritage presentation, it is one of its essential qualities. Information presented to the visitors should be appealing and provoking (Ham 1992), and able to touch the heart as well as the brain (Tilden 1977).

Diverse – heritage presentation should address the audience demographically and culturally. It should take into consideration different learning styles and be presented through a wide range of media.

Our respect for the audience should also extend to the ways we present information. It is already known that people have different learning styles and rely on various ways of information acquisition. Some prefer written information to audio material, others choose to watch a film about the site rather than join a guided tour. It is also proven that people remember more information if they use as many senses as possible (Lewis 2005). Many studies also prove that adults and children have different learning styles, though this does not mean that children are not capable of retaining the same amount of information as adults; on the contrary they are often capable of remembering more than their parents (Tilden 1977). ICOMOS underlines the necessity to provide information in different languages in a heritage presentation programme, because World Heritage Sites have a wide range of international visitors (ICOMOS 2007).

2.   IMPARTIALITY AND OBJECTIVITY

It is a responsibility of the personnel at a heritage sites to present honest and truthful information to the audience. "Most museums [and heritage sites] are places where exhibited information is derived from scholarly and scientific pursuits, therefore, the public expectation is that the information presented in museum programs and exhibitions is accurate" (Dean 1997:218). As a rule, people trust the information presented and it is our responsibility as professionals to make every reasonable effort to present it accurately. The following principles underline not only a need in a well researched presentation but also the necessity to include the environment (setting and communities) to a heritage presentation programme in order to produce an objective picture.

Well-researched – heritage presentation should be based on the best contemporary research but should attempt to include traditional storytelling and folklore.

Uzzel once pointed out that "at the heart of good interpretation lies good research" (1994:293). The same idea was supported by Lawson and Walker (2005:13), who stated that it is necessary to base heritage presentation on a well researched, multidisciplinary study of the site and its surroundings. At the same time, heritage presentation should not exclude the "reflection on alternative historical hypotheses, local

myths, and stories" (ICOMOS 2007:7). When two scientific opinions exist on an issue, heritage presentation should provide both, thereby leaving an opportunity for the visitor to decide which one to support (Tilden 1977). Traditional storytelling or memories of historical participants can provide important information about the significance of the site. Dean points out that it is important to give community "values and beliefs proper credit, even if the staff does not share them" (1997:222).

Contextual – in a heritage presentation programme a site should be presented as a whole, including landscape and its intangible elements.

Through our natural curiosity, we always want to know the complete story (Tilden 1977). Thus, it is important to take into account all the historic periods and all groups that have contributed to the historic and cultural significance of the site as well as natural context and setting (ICOMOS 2007). The surrounding landscape as well as intangible elements (stories, music, dance, cuisine, etc.) are an integral part of the site's significance and should be included in a heritage presentation programme.

3.   DUTY OF CARE

Heritage professionals have a moral obligation to care about a heritage site and work for the preservation of its significance and authenticity. It would be wrong to believe that heritage presentation has nothing to do with site preservation. On the contrary, it should contribute to preservation by attracting additional funds and human resources. By providing people with quality information about the site, it prompts the others to develop the feeling of ownership and care for it.

Sustainable – heritage presentation should be a part of the budgeting and management process and should be capable of attracting both financial and intellectual support.

The main requirement of heritage presentation programmes nowadays is that they have to be self-sustaining. To achieve that, it is necessary to convince the public and administration that heritage presentation is not "a luxury, but instead an essential service providing multiple benefits to individuals, to society, and to the sponsoring organisations" (Beck and Cable 2002:125). Heritage presentation should become an integral part of management and the conservation

process. It should be integrated into all stages of a conservation project: in preparation of a conservation plan, before, during and after completion of works (Lawson and Walker 2005).

4.   AVOIDING POTENTIAL OR APPARENT CONFLICT OF INTEREST

World Heritage Sites are complex entities which comprise many stakeholders with their particular interests and needs. Our responsibility as professionals is to know and respect those interests. We have to respect our stakeholders the same way we respect the audience to the site. A lot of conflicts arise from lack of information, misrepresentation and the inability of stakeholders to influence the management of a site. By providing quality heritage presentation, which takes into consideration the interest of stakeholders and which is developed with their collaboration, we can avoid some potential conflicts.

Inclusive – heritage presentation programmes should include wide consultancy and further periodic revision with communities and heritage professionals.

Presentation of the cultural heritage should be carried out in collaboration with heritage professionals, associated communities, and other stakeholders (ICOMOS 2007). Community, professional and government organisations have skills and knowledge which can be a valuable contribution to heritage presentation (Lawson and Walker 2005). Heritage presentation is an ongoing dynamic process and it should be designed to ensure that periodic revision and updating is possible (ICOMOS 2007).

Sensitive – heritage presentation should be sensitive to diverse values of the visitors and communities, as well as physically accessible. It should seek the ways of presenting the information in a non-intrusive way to the setting.

A heritage presentation programme should "respect traditional social functions of the site and the cultural practices and dignity of local residents and associated communities" (ICOMOS 2007:9). At the same time, it is important to remember that visitors also have diverse values through which they perceive historical events. Values that form the basis of our presentation of historical events often

change. Thus, "… we must strive for [heritage presentation] to be historically correct for its time, not just politically correct for ours" (Beck and Cable 2002:78). The heritage presentation infrastructure should aspire to be sensitive to the character and setting of the site. All heritage presentation activities should be physically accessible, or in cases where it is not possible, heritage presentation should be provided off-site (ICOMOS 2007).

Conclusion

It is difficult to develop principles of heritage presentation which would be equally accepted everywhere. Nevertheless this article has made an attempt to extend the principles through ethical categories in order to emphasize moral responsibilities and obligations of heritage professionals, regardless of the country or nationality. World Heritage Sites should not only be accessible to all, but we should also strive to make them understandable to all. The world heritage status places a number of obligations on the management of the site, one of them being the quality presentation of the site. The offered principles point out the main ethical areas we have to consider in developing a heritage presentation programme and outline the ways they can be implemented in practice.

REFERENCES

AIC Committee on Ethics and Standards. 1979. *Code of ethics and Standards of Practice*. Washington: American Institute for the Conservation of Historic and Artistic Works.

Beck, Larry, and Ted Cable. 2002. *Interpretation for the 21st Century: Fifteen Guiding Principles for Interpreting Nature and Culture*. 2nd ed. USA: Sagamore Publishing.

Dean, David. 1997. Ethics and Museum Exhibitions. In *Museum Ethics,* ed. Gary Edson: 216-224. London: Routledge.

Edson, Gary. 1997. Ethics. In *Museum Ethics,* ed. Gary Edson: 3-17. London: Routledge.

Ham, Sam. 1992. *Environmental Interpretation: A Practical Guide for People with Big Ideas and Small Budgets*. Colorado: North American Press.

ICOMOS 2004. *International Charters for Conservation and Restoration*. München: Lipp GmbH

ICOMOS 2007. *The ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites: Proposed Final Draft*. Available from http:// http://www.enamecharter.org/downloads/ICOMOS_Interpretation_Charter_E N_10-04-07.pdf; accessed 15 August 2007.

Lawson, Elaine, and Meredith Walker. 2005. *Interpreting Heritage Places and Items Guidelines*. Heritage Information Series. Australia: NSW Heritage Office. Available from http://www.heritage.nsw.gov.au/docs/info_interpreting.pdf; accessed 12 July 2007.

Lewis, William. 2005. *Interpreting for Park Visitors*. 9th ed. USA: Eastern National.

McNaughton, David, and Piers Rawling 2007. Deontology. In *Ethics in Practice: an Anthology*, dd. Hugh LaFollette: 31-44. London: Blackwell Publishing.

Tilden, Freeman. 1977. *Interpreting Our Heritage*. 3d ed. Chapel Hill: The University of North Carolina Press.

UKIC. 1983. *Guidance for Conservation Practice*. London: United Kingdom Institute for Conservation.

UNESCO. 1972. *Convention Concerning the Protection of the World Cultural and Natural Heritage*. Available from http://whc.unesco.org; accessed 04 June 2007.

Uzzel, David. 1994. Heritage Interpretation in Britain Four Decades after Tilden. In *Manual of Heritage Management,* ed. Richard Harrison: 293-302. Oxford: Butterworth-Heinemann.

Wearing, Stephen, and John Neil. 1999. *Ecotourism: Impacts, Potentials and Possibilities*. Oxford: Butterworth-Heinemann.