Organization of
American States

Expanding the Socio-Economic Potential of Cultural Heritage in the Caribbean.
Phase I: Needs assessment and project theme selection

Final Phase I Project Report

Prepared by Coherit Associates LLC

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Contents

PRESENTATION

The project **Expanding the Socio-Economic Potential of Cultural Heritage in the Caribbean. Phase I: Needs Assessment and Project Selection** is an initiative coordinated by the former Office of Education and Culture of the Organization of American States (OAS). The goal of this project is to contribute to expanding the socio-economic benefits of regional cultural heritage as valuable, non-renewable public resources through a new paradigm of public engagement.

During Phase I, a detailed situation analysis was conducted on cultural heritage and its relation and contribution to the social and economic development of the CARICOM members of the OAS. This phase concluded with the establishment of a Regional Heritage Network to promote the protection and development of cultural heritage resources in the Caribbean by professionals from governmental institutions, the private sector and civil society organizations.

The final report of "Phase I: Needs Assessment and Project Selection" summarizes all activities and results achieved from October 2012 to July 2013. This phase identified the trends, practices and attitudes about tangible and intangible heritage throughout the Caribbean region through a needs assessment survey that focused on the challenges and opportunities of heritage in the administrative, economic and socio-cultural areas. Furthermore, consultations were made with heritage stakeholders in an experts' meeting in Christ Church, Barbados and via other channels (i.e., online surveys and conferencing), to expand the findings of the survey and inform on recommendations about potential model project themes to be developed in a subsequent phase.

This project would not have been possible without the generous financial support and guidance provided by the United States Permanent Mission to the OAS, to which we are very grateful. We also extend our appreciation to all participating heritage professionals and stakeholders from the CARICOM region and beyond that contributed with their time and valuable insight in the survey and consultation activities. We would like to especially thank the Ministry of Culture, Sports and Youth of Barbados for hosting the project stakeholder's meeting in Christ Church from June 7 to 9, 2013. In particular we recognize the role of Ms. Celia Toppin, Deputy Permanent Secretary (Culture and Sports), and of her team in arranging this meeting.

A special note of gratitude goes to our project consultants Gustavo Araoz, Angela Labrador, and Neil Silberman of Coherit Associates LLC, for the preparation of this final report. We would like to acknowledge the professional quality of their work and their dedication to this project. Last but not least, many thanks to the team of the former OAS Office of Education and Culture, who were responsible for coordinating the overall development of this project, Lenore Garcia, Graciela Meza, Marisa Garcia and Jane Piazer.

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EXECUTIVE SUMMARY

Phase I of the Project "Expanding the Socio-Economic Potential of Cultural Heritage in the Caribbean" was designed as the initial needs assessment and stakeholder engagement stage of a regional initiative of the former OAS Office of Education and Culture (OEC) to contribute to enhancing the capacity of the regional cultural heritage sector. The main activities of this phase, summarized in this document included:

- the formulation and dissemination of a detailed online survey of perceived needs and state of the heritage field across the public, private, and NGO sectors;
- the development and publication of an online database and content management system to organize stakeholder data and disseminate information to participants;
- the compilation and publication of a detailed analysis of the survey results to identify regional needs and potential opportunities for network and capacity enhancement;
- the verification and discussion of the survey findings with a sample of regional experts assembled at a meeting in Barbados, including the preliminary prioritization of potential model project topics;
- the completion of follow-up consultations with a sampling of additional stakeholders to confirm and expand the survey findings, potential model project topics, and the proposed implementation plan;
- the specification of a set of criteria for prioritizing model projects and a list of model project topics, goals, and possible locations or host institutions;
- the creation of a roster of volunteer and proposed founding members of thematic issue groups, linked to model projects they would be tasked with helping to scope;
- the description of a set of recommended action steps for scoping, implementing, and monitoring model projects.

The results of Phase I provided the initial research and stakeholder engagement activities necessary for the detailed planning and implementation of selected model projects and the expansion of the regional professional network that is intended for Project Phase II.

PHASE I GOALS

Objective

The general development objective of this project is to contribute to expanding the socio-economic benefits of regional cultural heritage as valuable, non-renewable, multi-component, and multi-stakeholder public resources through a new paradigm of public engagement.

The participation of the OAS as a forum of public policy consultation and implementation of regional programs—with special emphasis on cooperation and exchange of information and best practices—contributed to the project's organizational framework of consulting directly with key policymakers, professionals, and advocates from the 14 Caribbean member states regarding their specific contexts while maintaining a regional perspective in identifying potential opportunities to match strengths of particular sectors or nations with the current weaknesses of others.

The specific goal of this project phase was to identify key regional stakeholders and gain their input to inform an intersectoral strategy for promoting the protection and development of regional cultural heritage resources by governmental institutions, the private sector, and civil society. The completion of Phase I activities will serve to direct subsequent scoping and implementation of model projects that address regional capacity needs and expand the socio-economic potential of cultural heritage in the Caribbean region.

Outputs

The activities of Phase I were organized around the production of two main outputs:

1. Survey Analysis Report

The initial Phase I output was a report describing and analyzing the needs and priorities as perceived by regional stakeholders regarding the protection, use, and enhancement of cultural heritage. This detailed situation analysis of cultural heritage needs and opportunities serves as the informational basis for planning future strategies for addressing national and regional heritage policy initiatives, strengthening the capacity of regional professionals to protect cultural heritage and mitigate potentially negative impacts, developing public outreach programs, and strengthening educational and professional development opportunities.

2. Recommendations for Regional Capacity-Building

The second Phase I output was a specific set of recommendations for collaborative actions to be implemented in Phase II that center on building a regional heritage network linking a wide range of professionals and stakeholders. This network would provide a forum to exchange knowledge and resources and insure the regional applicability and relevancy of future project initiatives. Additionally, the recommendations list a number of potential model projects that aim to enhance the protection of cultural heritage resources; increase regional, national, and local control over socio-economic benefits derived from cultural heritage; and/or strengthen collective memory and shared identity among the population. The recommended potential model projects are directly informed by the needs assessment conducted through the online survey and subsequent stakeholder consultation and are organized around the priority objectives that emerged during the Phase I work.

Cross-cutting Goals and Considerations

Gender Equity

In enhancing the scope and inclusiveness of cultural heritage development, this project stresses the equitable commemoration of women's and men's roles in the shaping of the region's history and culture, and the incorporation of gender equality as a fundamental principle of public policy in cultural heritage planning and participation. Stakeholder sampling and selection was conducted in a gender-neutral manner, and questions were included in the needs assessment that indicated the gender representativeness of particular sectors (e.g. among employees and students) and heritage audiences (e.g. whether women or men were underserved by the heritage sector).

Environmental Sustainability

Environmental concerns are central to this project, especially in the recognition of the close connection between natural and cultural conservation efforts; the serious environmental costs of uncontrolled tourism development and related infrastructural development; the value of safeguarding traditional knowledge of the local ecology; and the manner in which environmental impacts cascade across the Caribbean's regional cultural ecosystem. For those reasons, representatives from the public, private, academic, and NGO sectors who deal mainly with natural heritage resources (from an environmental perspective) were included to identify potential areas of synergy between cultural and natural heritage sectors and to establish the supports for a long-term bridge between these sectors.

Cultural Diversity and Populations in Conditions of Vulnerability

Inclusiveness and collaboration are fundamental ethical principles of this project's design. This project works toward including such populations in the process of heritage and identity formation, in light of the greater impacts of heritage development upon vulnerable populations. In that respect, attempts were made to include representatives of populations in conditions of vulnerability based on income level, educational opportunity, cultural or religious tradition, ethnic status, and immigration status. In addition, considerations for vulnerable populations in the representation of and access to historical and cultural resources were made in the prioritization of potential pilot projects.

FORMULATION AND DISSEMINATION OF ONLINE SURVEY

Survey Design, Construction, and Revision

The needs and priorities as perceived in the region regarding the protection, use, and enhancement of cultural heritage were documented and analyzed by means of an online survey that was constructed and distributed through the Qualtrics software service (http://www.qualtrics.com).

The survey questions were structured using logical branches of question sequences for the four sectors and ten subsectors (Table 1).

Table 1. Survey Stakeholder Sectors and Subsectors

Sector	Subsectors
Government	Government Education Ministries and Agencies
	Government Heritage Ministries and Agencies
	Government Tourism Ministries and Agencies
	Government Planning Ministries and Agencies
	Government Environment Ministries and Agencies
Non-profit, Non-Government	NGOs that directly engage with heritage
	NGOs that indirectly engage with heritage, typically through community development programs
Academic	Academic and educational institutions
Private, for Profit	Private, for-profit firms and private practitioners that directly engage with heritage
	Private, for-profit firms and private practitioners that indirectly engage with heritage, typically through economic development projects

Subsequently, a contact list identifying relevant stakeholder groups was formulated and continually expanded and refined throughout the entire span of the active online survey.

The survey instrument underwent a period of testing with selected regional and international heritage professionals that concluded on January 25, 2013. The survey was activated online on January 31, 2013.

Dissemination and Monitoring

The OEC began to distribute official letters of invitation to participate in the survey and assisted Coherit in monitoring and correcting email addresses and associated contact information from January 31 through April, 2013. Coherit coordinated the distribution of survey logins through the Qualtrics software.

Coherit monitored the collection of valid responses through the Qualtrics software and issued reminders to survey invitees on a regular basis. OEC reached out to contacts within the OAS, and especially within the Inter-American Committee on Culture (CIC) following Coherit's presentation at the Fifth Regular Meeting of the CIC on March 21-22, 2013, to encourage higher response rates and identify more potential respondents.

Coherit and the OEC staff were able to secure a 50% response rate (of valid responses) from survey invitees. The response rate strategy was revised and optimized to reflect the representation of each subsector (n=10) across each member state plus a regional perspective (n=15). When computing representation in this way, responses representing 91 subsectors throughout all the participating countries (out of a total 150), or 61%, were received. This response rate was deemed by both the OEC and Coherit as sufficient for analysis of the gaps and overlaps in the regional heritage sector.

INFORMATION PORTAL AND STAKEHOLDER DATABASE

Database development and launch

In order to provide a secure, web-based database to organize, access, and archive all collected information, activity records, and relevant correspondence for later network formulation and projects, a website to provide a platform for disseminating project information, providing networking capabilities among stakeholders and project coordinators, and managing project data.

The information portal and stakeholder database was publicly launched on March 19, 2013, at http://www.caribheritage.org.

Database updates

The online stakeholder database was further updated with all stakeholder consultation data following the heritage experts meeting held in Christ Church, Barbados from May 7 to 9, 2013, and further consultations.

SURVEY ANALYSIS

Initial analysis

Immediately following the close of the online survey, Coherit began an intensive qualitative analysis and, when the data permitted, quantitative analysis of the survey responses. The resulting report provided an analytical summary of the responses regarding perceived trends, practices, challenges, and attitudes about cultural heritage throughout the region. The intent of this report was to identify regional gaps and strengths in the protection and promotion of cultural heritage (across and among sectors and member states), as well as to highlight the range of potential themes for collaborative regional work.

The findings of this survey report were organized as follows:

- Chapter 1 analyzed the existing legal and policy frameworks for heritage protection;
- Chapter 2 contained information relating to existing funding mechanisms for cultural heritage, and existing challenges related to human resources in the region;
- Chapter 3 contained information relating to heritage administration, including its oversight and monitoring, and to external challenges connected with tourism and other socio-economic and environmental factors.

Revision of analysis

After suggestions for revision from the OEC were incorporated into the text, an initial draft of the report was made available to invited participants to the heritage experts meeting (described in the next section) via a secure link on the caribheritage.org information portal. It was further revised in light of the stakeholder feedback provided during the meeting.

REGIONAL EXPERTS MEETING

A three-day consultation with selected experts from the region was held in Christ Church, Barbados, May 7- 9, 2013, in order to present, verify and expand the findings of the detailed needs assessment carried out between January and April 2013. Additional goals of the meeting were to formulate recommendations for action and identify the selection criteria for future model projects in Phase II of the project. The Ministry of Culture, Sports and Youth of Barbados hosted and co-organized the meeting, which brought together about 30 experts from participating member states.

Meeting Preparation

Participants

Nine core stakeholders from eight member states (Antigua and Barbuda, Bahamas, Belize, Dominica, Jamaica, Trinidad and Tobago, Guyana, Grenada) were invited to participate in the meeting on the basis of their survey responses, expertise, and breadth of experience. Also invited to the meeting were additional experts and officials from Barbados as well as observers from the University of Leiden and the American Planning Association.

In total, the event brought together some 30 experts, mostly nationals from the CARICOM region. The group was carefully balanced to include individuals from government heritage and tourism sectors, civil society, the private sector, and academia.

The meeting was opened by Barbados Minister of Culture, Sports and Youth, Hon. Stephen Lashley, with addresses by Mr. Francis McBarnette, the OAS Representative in Barbados; Mr. Christopher Sandrolini, Charge d'Affaires Unites States Embassy to Barbados and the Eastern Caribbean; Ms. Celia Toppin, Deputy Permanent Secretary of the Barbados Ministry of Culture, Sports and Youth; and Ms. Lenore Garcia, Director of the OAS Office of Education and Culture. The meeting was moderated by Gustavo Araoz, Angela Labrador, and Neil Silberman of Coherit Associates. Lenore Yaffee Garcia and Jane Piazer attended as representatives of the OAS and assisted with the meeting's coordination and proceedings.

Program

The program for each of the three days (Table 12) focused on a separate theme, with findings presented in the morning, followed by structured discussion to verify and expand the presented findings, and concluding with a prioritized list of recommendations for model project areas.

Table 2. Meeting Program Summary

Day	Time	Description
May 6	7:00-9:00 pm	Welcome dinner
May 7	Morning	• Introductions, welcomes from officials • Presentation of Theme 1: "Expanding the Potential of Heritage Law and Public Policy"- Findings • Discussion of Theme 1 Challenges
	Afternoon	• Discussion of Theme 1 solutions and possible model project areas and priorities
May 8	Morning	• Presentation of Theme 2: "Developing Sustainable Protection and Public Engagement Practices to Address Socio-economic Challenges" – Findings • Discussion of Theme 2 Challenges
	Afternoon	• Discussion of Theme 2 solutions and possible model project areas and

		priorities
May 9	Morning	• Presentation of Theme 3: "Expanding Protection Funding and Human Resources Capacity" – Findings
		• Discussion of Theme 3 challenges, solutions, and possible project areas
	Afternoon	• Discussion of overall priorities and next steps

Meeting Discussions and Recommendations

The major contents of the meeting program and its results are summarized below.

Theme 1: Expanding the Potential of Heritage Law and Public Policy

Major findings verified and discussed:

1) There is wide disparity in the existence, awareness, and effectiveness of heritage legislation across the region.
2) Effective heritage legislation is not a high priority among politicians and general public, mainly because a lack of awareness of the contribution of cultural heritage to economies and societies.
3) Fiscal incentive policies are underdeveloped or not widely understood or employed for heritage protection across the region.
4) There is uneven participation by Caribbean member states within the international policy arena when it comes to cultural heritage.

Recommendations for model project areas proposed:

1) Identifying sources of economic data related to cultural heritage and modeling such data to more effectively communicate the impact of cultural heritage on the economy and society.
2) The development of model heritage legislation that can be used to evaluate national laws (including fiscal incentive policies).
3) Having a permanent presence of cultural heritage on the agenda and at meetings of the financial sector at the OAS and other political forums.
4) Enabling legislation for National Trusts to purchase, renovate, and lease public property.

Theme 2: Developing Sustainable Protection and Public Engagement Practices

Major findings verified and discussed:

1) There is wide disparity in the understanding and awareness of oversight standards across the region, including the lack of authority and teeth when standards are enforced.

2) Relatedly, there are many lists of heritage resources that may be considered "inventories" by survey respondents, but a lack of shared awareness and definitions of these data as well as what constitutes "official" inventories or registers.

3) Heritage entities across the region communicate news of their activities often, but do not necessarily engage or consult with the public to the same extent (even when legally required).

4) Heritage entities across the region serve some segments of the public well (e.g. youth), but acknowledge that other segments are underserved (e.g. elderly).

5) Most agree that tourism is a mixed blessing, bringing the promise of economic opportunity and cross-cultural communication, but threatening the sustainability of heritage resources if mismanaged.

Recommendations for model project areas proposed:

1) Awareness and appreciation programs developed for youth.

2) A uniform definition and set of standards for heritage inventories of the full spectrum of heritage types should be developed, including a clarification on the relationship between inventories and official registers of protected heritage elements. An inventory of existing inventories should be made to serve as a finding aid for officials and researchers and to guide the evaluation and improvement of existing inventories.

3) Community-based heritage tourism.

4) Community empowerment for identifying, managing, and developing the socio-economic benefits of cultural heritage resources.

5) Programs targeting young women and intangible heritage development.

6) Standards for authenticity in the usage of cultural expressions for heritage tourism and the rights of practitioners (including intellectual property rights).

7) Risk-preparedness and response plans.

Theme 3: Expanding Protection Funding and Human Resources Capacity

Major findings verified and discussed:

1) The relative instability or lack of funding across all sectors within the heritage field.

2) The lack of professional capacity and technical expertise, especially in the NGOs to effectively fundraise in a professional way and using contemporary tools.

3) The uneven distribution and availability of formal educational programs in heritage specialization. Several meeting participants noted a wide range of resources and initiatives in curricular development that could be made more accessible if stored in a single place.

Recommendations for model project areas proposed:

1) Establishment of a Caribbean Heritage Trust or Fund to serve as an umbrella organization for supporting heritage NGOs across the region, including providing technical expertise in project management and fundraising and gaining non-profit status or "Friends of" organizations.
2) Database of educational opportunities across the region to identify gaps in specialized training programs.
3) Caribbean Heritage Mentorship program to develop apprentice-like skill-transfer programs between traditional practitioners (elders) and aspiring practitioners (youth).
4) Better networking of heritage professionals across the region, including online platforms and conferences.

FURTHER CONSULTATIONS

Consultation Planning

The project developed a plan for further stakeholder consultations, which was finalized following the meeting in Barbados. Originally, the consultations were to be held in person at potential model project field sites. Instead, the consultation plan was reframed to use teleconferencing, virtual meeting software, and a short online questionnaire to include the input of more stakeholders, specifically:

1) participants from the Barbados meeting
2) selected survey respondents who were not at the meeting
3) additional regional and thematic experts identified by the above groups who did not respond to the survey but could play an important role.

The additional information and feedback from these consultations were meant to directly lay the groundwork for the regional network of heritage policymakers, professionals, and advocates, and identify the availability of stakeholders to participate in the Issue Groups (described later).

Revision of Survey Analysis

Following the meeting in Barbados, a revised version of the survey analysis report was uploaded to the online Caribheritage information portal and made it available to the public.

Consultations

Following the meeting in Barbados, further consultations were conducted with the three stakeholder groups previously mentioned. A link to the public report and a proposed action plan for Phase II preparations -including the proposed Issue Groups- was sent to these individuals with an invitation to consult via phone or online meeting software. The consultation questions were focused on gaining feedback on the proposed action plan, the structure and goals of the Issue Groups, and in what capacity (if any) the contact wished to participate in the project. These invitations were sent to 16 participants from the Regional Experts Meeting in Barbados and 46 survey respondents.

A short questionnaire was also issued via the Qualtrics online survey software to increase responses. Combined with the phone consultations, we received feedback from 37 contacts (approximately 60% of those invited).

Based on these consultations, participants generally agreed that the organization of the Issue Groups (described in the next section) and corresponding goals fully represented the central challenges facing the region. Most respondents also offered feedback on additional goals to consider for model project areas. Everyone consulted was eager to serve on an Issue Group and identified in what capacity they would be available to serve (leadership, part time, or advisory) and whether they were available to draft or provide comments on initial project proposal drafts. Most offered additional names and contact information to expand the thematic issues groups and the network as a whole.

MODEL PROJECT RECOMMENDATIONS

Regional Network and Issue Group Formation

One of the main recommendations that emerged from the survey analysis and the initial meeting in Barbados and that affirmed a foundational premise of the project was the establishment of a permanent Caribbean Heritage Regional Network.

The project proposes that the network be comprised of four issue groups (Figure 1) to serve as both the organizational core of the network and as the task forces that will help scope, coordinate, and review specific model projects in the implementation phase of this project. As the project proceeds, these regional issue groups will promote project activities and attract additional members to expand the network.

The four proposed issue groups have been organized around the following priority themes: 1. Legal Administration of Heritage, 2. Heritage Planning and Development, 3. Transmission of Heritage Values, and 4. Formal Heritage Education.
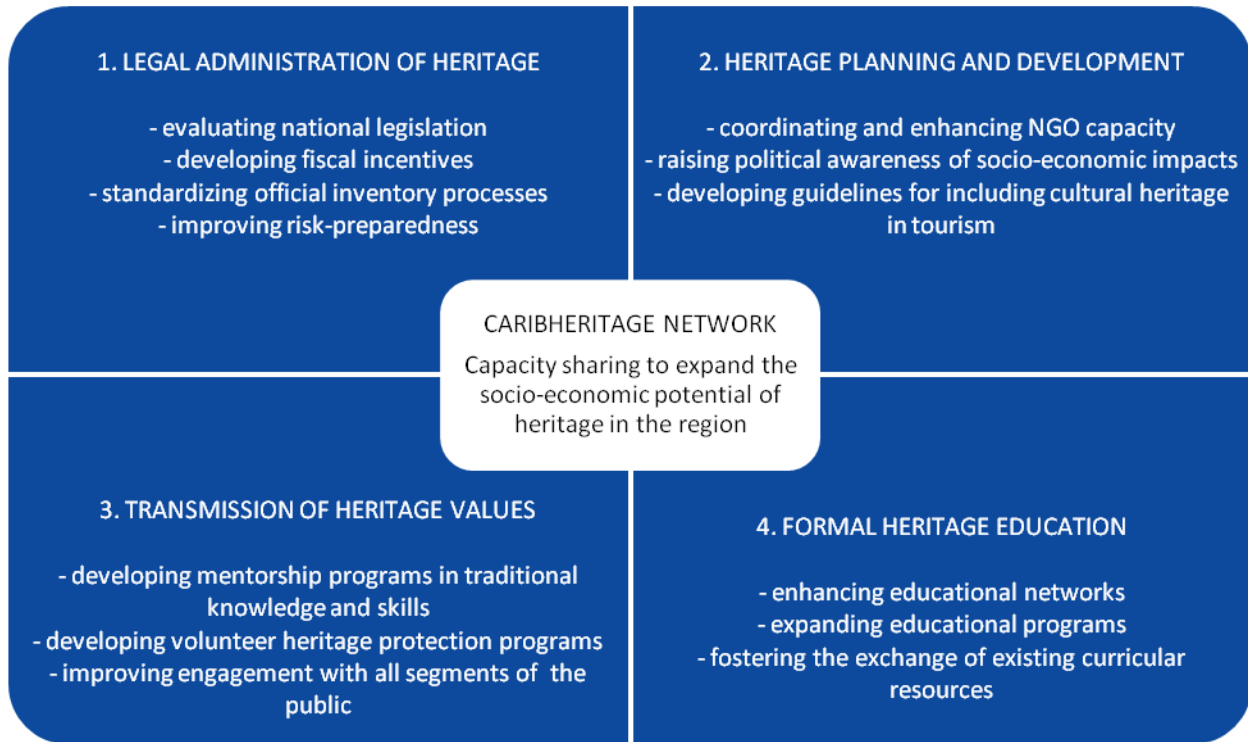
Figure 1. Proposed Caribbean Heritage Network Composition with Four Foundational Issue Groups and Associated Model Project Objectives

Recommendations for Model Project Themes

The issue groups outlined above correspond to the major groupings of 13 model project themes, which were recommended based on a set of six criteria:

1. Region-wide applicability
2. Policy relevancy
3. Regional capacity enhancement
4. Reflective of information gathered in Phase I
5. Potential to enhance public awareness and engagement
6. Feasibility and sustainability

The 13 model project themes and their main objectives and goals are summarized in Table 3.

Table 3. Recommended Model Project Themes, Objectives, and Goals

Issue Group	Model Project	Objective	Goals
1. Legal Administration of Heritage	**1.1 Evaluating and updating heritage legislation**	Provide a regional standard by which current national heritage legislation may be evaluated to update and improve protection of all heritage types across the member states.	identifying requisite components of heritage legislation
			evaluating existing heritage legislation by recommended standard
			advising how legislation may be amended to meet the recommended standard
	1.2 Developing fiscal incentive policies	Produce a portfolio of fiscal incentive policies that are used to facilitate private sector participation in heritage protection.	identifying existing models of fiscal incentive policies
			assessing fiscal incentive policies and/or identifying parameters for optimal effectiveness
			advising authorities how fiscal incentive policies may be implemented and/or implementing a policy as a model case
	1.3 Standardizing official inventories	Produce a regional standard and catalog of official heritage inventory systems.	developing standardized inventory and register definitions and methodologies
			specifying an inventory system infrastructure that takes better advantage of contemporary technologies
			identifying the range of existing inventories in a catalog or database to serve as a finding aid
			increasing the compatibility of existing and future inventories

	1.4 Improving risk preparedness	Support the improvement and implementation of risk preparedness plans for protecting cultural heritage in the face of natural or man-made catastrophes.	identifying and providing access to existing risk preparedness plans and resources
			providing technical assistance in adopting and testing plans
			raising awareness regarding threats related to climate change and networking with the natural heritage community
2. Heritage Planning and Development	**2.1 Coordinating and enhancing NGO capacity**	Provide an organizational framework for strengthening and coordinating the NGO sector.	developing a permanent umbrella organization to enhance the capacity of regional NGOs
			coordinating efforts to communicate priority needs to the public and political leaders
			facilitating information exchange through peer-to-peer networking
			expanding potential sources of NGO funding, technical assistance, and volunteers
	2.2 Raising political awareness of socio-economic impacts of heritage	Raise awareness of and appreciation among policymakers for the range of socio-economic benefits that can accrue from cultural heritage.	identifying sources and procedures for gathering data on socio-economic impacts of cultural heritage
			establishing presence of heritage sector representatives at forums of the financial sector
			improving the communication of the social and economic benefits of heritage to decision-makers

	2.3 Developing regional guidelines for the sustainable protection and promotion of heritage in tourism	Identify proactive ways in which some of the most common negative impacts of the commercialization of heritage for the tourism market can be mitigated.	formulating planning procedures and protection standards to prevent the overexploitation or misuse of heritage resources
			documenting eco- and community-based heritage tourism initiatives that deliver socio-economic benefits and protect heritage resources
			identifying opportunities to expand local cultural tourism products and facilitating access to the market for traditional cultural practitioners
3. Transmission of Heritage Values	**3.1 Developing mentorship programs**	Facilitate the inter-generational exchange of traditional knowledge and skills between older practitioners and younger apprentices, providing both intergenerational continuity and economic viability for traditional skills and crafts.	identifying craftspeople and bearers of traditional knowledge, documenting their crafts and traditions, and raising public awareness of their work
			providing logistical support to establish training programs for apprenticeships
			reaching out to youth to promote socio-economic values of traditional activities
	3.2 Developing volunteer programs	Utilize the capacity, knowledge, and skills of the general public to benefit the conservation of heritage and enhance a sense of common civic stewardship.	identifying existing programs that utilize volunteers to conserve and steward heritage
			implementing and promoting volunteer conservation programs
			disseminating guidebooks on effective utilization of volunteers
	3.3 Improving engagement with all segments of the public	Develop inclusive public cultural heritage policies and programs, with attention to communities who are underserved or in conditions of	evaluating programs that target specific audiences to mitigate effects of social exclusion

			increasing programs that involve segments of the public in protection and promotion
			providing a participatory framework for monitoring and evaluating
4. Formal Heritage Education	**4.1 Enhancing educational networks**	Establish a regional network of cultural heritage educational institutions and programs and link these to international heritage organizations.	cataloguing, evaluating, and publicizing existing heritage educational programs
			linking educational institutions to develop conferences, lectures, and intellectual exchange
			linking educational institutions to international professional organizations to provide networking opportunities
	4.2 Expanding educational programs	Enhance the curricula and academic degrees available to aspiring and early career professionals.	identifying and filling gaps in existing programs
			facilitating the creation of career enhancement programs
			establishing or utilizing existing exchange programs and internships
			facilitating participation of students in online courses
	4.3 Fostering the exchange of existing curricular resources	Coordinate and provide access to educational resources and reports that already exist but are unevenly distributed or scattered across the region and its many regional and international bodies.	enabling online exchange of curricular materials
			providing an online publication forum for instructional materials
			improving communication with ministries of education to ensure that heritage subjects are incorporated in national curricula

Model Project Host Sites and Organizations

36 potential model project hosts, whose current priorities closely match the model project themes and who are in a potential position to assist in the implementation of those model projects were identified. These potential hosts are distributed throughout the participating member states in order to maximize geographical representation (Table 4).

Table 4. Distribution of Potential Hosts for Model Project Themes

Member State	Model Project Themes														Total
	1.1	1.2	1.3	1.4	2.1	2.2	2.3	3.1.1	3.1.2	3.1.3	3.2	3.3	4.2.1	4.2.2	
Antigua and Barbuda		1						1							2
Bahamas			1						1			1			3
Barbados	1				1		1			1		1		1	6
Belize				1	1				1			1			4
Dominica								1		1	1				3
Grenada			1									1			2
Guyana														1	1
Jamaica							1				1			1	3
St. Kitts and Nevis											1		1		2
St. Lucia						1			1	1					3
St. Vincent and the Grenadines													1		1
Suriname	1			1											2
Trinidad and Tobago		1				1		1						1	4
Total	2	2	2	2	2	2	2	3	3	3	3	4	2	4	36

Identification of Issue Group Members

A roster of potential issue group members was submitted. Each issue group contains a core group of members who had volunteered to serve on the associated issue group in some capacity and to participate in model project proposal drafting and reviewing (in some cases, the issue group members will be subdivided to concentrate on specific model project themes within the issue group). A slate of additional members was also proposed, whose survey responses indicated their potential contribution to the issue group's Phase II tasks and whose participation also would enhance regional representation. The rosters are summarized in Table 5.

Table 5. Summary of Issue Group Rosters

Issue Group	Volunteer Core Members	Additional Recommended Members
#1 Legal Administration of Heritage	9	9
#2 Heritage Planning and Development	12	14
#3 Transmission of Heritage Values	9	12
#4 Formal Heritage Education	8	8

RECOMMENDED ACTION PLAN

A detailed action plan was compiled to map the activities required to build and develop regional capacity to protect cultural heritage throughout the region and to implement collaborative model projects that will enhance the socio-economic potential of cultural heritage in the Caribbean.

This plan details 15 recommendations for three stages of Project Phase II:

Recommended actions for planning stage

Establishing a Regional Heritage Network

As confirmed in the analysis of the data collected from the online survey, at the regional experts' meeting in Barbados, and in subsequent consultations with stakeholders, there are a number of important challenges to the sustainable protection and promotion of cultural heritage throughout the region, as well as a wealth of existing regional skills and human resources to address them. This suggests that great benefit can be obtained through the matching of existing regional strengths to needs throughout the region.

Recommendation 1: A permanent Caribbean Heritage Regional Network should be established to foster the development of common policies, exchange of knowledge, and enhancement of existing resources and expertise.

Network Formation through "Issue Groups"

The breadth of existing regional heritage skills is indicative of the multisectoral and interdisciplinary nature of the heritage field. Therefore the network would initially be composed of four distinct issue groups, each of which will mobilize specialized expertise to meet the specific heritage challenges of the region.

Recommendation 2: The following four issue groups should be formed within the network to effectively address the central priority themes identified by the Phase I activities:

1. Legal Administration of Heritage
2. Heritage Planning and Development
3. Transmission of Heritage Values
4. Formal Heritage Education

Evaluation and Selection of Model Projects to be Scoped

The following thirteen collaborative regional model project themes have been suggested in the course of the online survey, regional meeting, and consultations. These project themes will serve as regionally-adaptable models for multi-level, interdisciplinary, and participatory heritage engagement to strengthen regional, national, and local control over socio-economic benefits and reinforce collective memory and shared identity among the population. Those projects with the greatest feasibility and potential for positive regional impact will be selected to be developed by the issue groups into scope of work documents and corresponding budgets.

Recommendation 3: The technical consultants, in consultation with the OEC and donor, should evaluate the list of recommended project themes according to the criteria established and finalize the list of projects to be scoped.

Review and Finalization of Issue Group Member Rosters

The 470 individuals identified and invited to participate in the needs assessment offer a diverse and rich set of talents and heritage skills. A core group of 81 heritage professionals, whose expertise maps closely to the needs of the potential model projects, have been suggested. These potential issue group members, who work within 13 participating member states, would be tasked to apply their specialized skills to the drafting and/or review of scope of work documents for the list of model projects assigned to their issue group.

Recommendation 4: Rosters of issue groups should be reviewed and expanded by the technical consultants, in consultation with the OEC, to ensure geographical representation of all participating member states, heritage sectors, and relevant expertise.

Recommendation 5: Official invitations should be issued to the individuals listed in finalized rosters to confirm willingness to draft or review drafts of designated model projects; a file of substitutes should be maintained in case of refusals.

Review and Finalization of Suggested Model Project Host Lists

The 394 organizations identified in the needs assessment feature a wide range of experts and institutional experience. The organizations, whose current priorities closely match the recommended model projects selected, as well as other suitable institutions or organizations suggested by the issue group members or which respond to an open call will be evaluated and selected as model project hosts.

Recommendation 6: The suggested model project hosts should be reviewed in accordance with the criteria established by the OEC and project donor—as well as by the issue group members-- for their capacity to effectively host potential model projects. In addition, an open call for expressions of interest with specific criteria should be issued in order to broaden the roster of possible hosts, beyond the recommended list.

Recommendation 7: The list of potential hosts confirming their willingness to provide sponsorship and/or logistical support for the implementation of model projects should be evaluated by the task forces and project team. Formal invitations should be issued after consultation with the OEC and the donor.

Expansion of Information Portal and Stakeholder Database

Because the project team and issue group members are geographically dispersed and would need a unified platform to access and share information, the online project portal would be an invaluable communication tool for collaborative project planning, implementation, dissemination activities.

Recommendation 8: The present project information portal should be further developed to include collaboration and communication modules for each issue group and model project task force; usernames and passwords should be issued to all confirmed members.

Drafting of Scope of Work Documents

In keeping with the stakeholder-driven character of this project, the members of the model project task forces would contribute their individual expertise to the collaborative planning of model projects to ensure regional adaptability. When necessary, outside experts would be consulted to assist in the formulation of detailed work schedules, division of tasks, and budgets for model projects.

Recommendation 9: Task force deliberations and formulation scope of work documents and budgets for model projects should be overseen by technical consultants to ensure compatibility with project criteria and highest professional standards.

Final Selection of Model Projects to be Funded

The model project scope of work documents would provide a sound basis for funding and implementation. However, only a certain number would be funded by this project, based upon the available budget. Therefore, with the completion of detailed scopes of work and corresponding budgets, a final decision would be made on which of the model projects will be funded in Phase II. However, all the scope of work documents could be used by the members of the network to seek alternative sources of funding.

Recommendation 10: The technical consultants, OEC, and donor should select model projects with greatest potential impact, to implement within available funding.

Recommended actions for Implementation Stage

Recommendation 11: Selected model projects should be implemented following the workplan, schedule and budget detailed in the scope of work documents.

Recommendation 12: The socio-economic impact of model projects should be monitored and evaluated, based on specific indicators described in the scope of work documents.

Recommendation 13: Detailed project guides should be compiled to enable heritage professionals from the region to adapt and implement these initiatives for enhancing the protection and benefit of Caribbean cultural heritage.

Recommended actions for dissemination stage

Recommendation 14: A concluding project event should be organized to promote the documented impacts of the model projects to regional policymakers; the online regional network platform should be publicly launched at the same event to expand membership among regional heritage professionals.

Recommendation 15: The administration of the network platform should be delegated to a designated regional host institution or organization to serve as a lasting legacy of the project, for the ongoing production and exchange of knowledge among network members.