ICOMOS – CIPA – GCI

RecorDIM Initiative

(RecorDIM … the activities of **Recor*ding*, D*ocumentation* and I*nformation* M*anagement*)

2002 Activities Report

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RecorDIM Initiative
January 2003

Introduction

This report was prepared by Robin Letellier, under the terms of his contract with the Getty Conservation Institute (GCI), to coordinate the activities of the **Recor**ding, **D**ocumentation and **I**nformation **M**anagement Initiative (**RecorDIM**). It summarizes the RecorDIM activities that took place during 2002.

It is meant to provide heritage conservation practitioners worldwide with an understanding of the RecorDIM Initiative and its recent outputs. It is a follow-up to the **RecorDIM Initiative 2002-3 Action Plan** (appendix A) that was developed in the spring of 2002, as a result of the RecorDIM Roundtable-1 (appendix B) organized by the GCI, in Los Angeles, in March 2002.

First, it provides a series of brief reports on the following **RecorDIM 2002 meetings** that took place:

1. in **Los Angeles**, at the Getty Conservation Institute (March 4-5)

    - To identify RecorDIM gaps and needs

2. in **London,** at English Heritage (August 27):

    - To Introduce the RecorDIM Initiative to English Heritage and to discuss areas of interest and possible participation

3. In **Corfu**, with CIPA (September 1-3):

    - To discuss and work towards creating RecorDIM Task Groups to fill some of the gaps identified

4. In **Seville**, with the ICOMOS Advisory Committee (November 29)**:**

    - To present the 5-Year RecorDIM Initiative to the ICOMOS Bureau, Executive and Advisory Committee, during the Pre-Assembly Meetings

5. In **Madrid**, within the Documentation Section of the ICOMOS General Assembly Symposium (December 3):

    - To identify and discuss additional gaps and needs that exist between the Information User and the Information Provider, by organizing and moderating the RecorDIM Round Table-2; and

    - To work towards increasing Information Users participation to CIPA's XIXth International Symposium that will take place next year in Antalya, Turkey (September 30 - October 4, 2003)

Secondly, this report describes the main outputs from the above meetings, and proposes a **RecorDIM action plan for 2003-4**.

While the table of contents hereafter provides hyperlinks to specific parts of the report, a broader overview of key RecorDIM activities that took place over the past 3 years is provided in the **RecorDIM Table of Activities** (see attachment 1).

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RecorDIM Definitions

- <u>Heritage Recording</u>...the capture of information relevant to understanding the physical configuration, evolution and condition of heritage sites and objects, at known points in time, and the basis of decisions made to alter or care for such sites and objects.

- <u>Documentation</u>...information units acquired over time through heritage recording and other research means which constitute the knowledge base for particular sites and objects.

- <u>Information management</u>...the process of acquiring, storing and sharing site documentation to ensure its accessibility, security and reliability.

- <u>Conservation</u>... concerned with the transmission of cultural heritage, with its significant messages intact and accessible to the greatest degree possible.

- <u>Conservation Process</u>…the analytical decision-making process of ensuring that conservation intervention at all levels will respect heritage values of sites while maintaining functional effectiveness within applicable budget and other constraints.

- <u>Conservationists / Conservation Specialists</u>...those who, whatever their profession, trade or discipline of origin (i.e. art historians, architects, archaeologists, planners, etc.), engage in the practice of conservation and are committed to the application of the highest principles and standards of the field in their work. They are also referred to as **"<u>Information Users</u>".**

- <u>Heritage Recorders</u>...all levels of experts in the design and execution of effective heritage recording activity within the conservation process. They are also referred to as **"<u>Information Providers</u>".**

- <u>RecorDIM</u> … the activities of **Recording, Documentation and Information Management**

Acronyms

ICOMOS - International Council of Monuments and Sites

ISC - ICOMOS International Scientific Committees

CIPA - 'Comité International de Photogrammetrie Architecturale' (recently re-named 'CIPA the ISPRS-ICOMOS Committee for Heritage Documentation')

GCI - the Getty Conservation Institute

ISPRS - international Society for Photogrammetry and Remote Sensing

ICCROM - International Centre for the Study of the Preservation and Restoration of Cultural Property

EH - English Heritage

PCA - Parks Canada Agency

HCP-PWGSC - Heritage Conservation Program of Public Works & Government Services Canada

RecorDIM - Recording, Documentation and Information Management   (RecorDIM) Initiative (see web presence at: http://recordim.icomos.org/index.html)

Background

Between 1995 and 1999, a series of outreach workshops held by the International Committee for Architectural Photogrammetry (CIPA) has identified critical gaps in the fields of heritage Recording, Documentation and Information Management between those who provide information for conservation and those who use it. In response, the International Council on Monuments and Sites (ICOMOS), the Getty Conservation Institute (GCI) and CIPA together created the RecorDIM Initiative partnership.

The purpose of the initiative is to bring information users and providers together to identify the nature of the gaps between them, to develop strategies to close the gaps and to recommend a framework for action to be coordinated by the RecorDIM Initiative over a period of five years (2003-2007).

As proposed during CIPA's Potsdam 18th International Symposium in September of 2001, the RecorDIM Roundtable-1 was organized and sponsored by the GCI. The Roundtable-1 report is provided at: Bridging the Gap Between Information Users and Information Providers .

Robin Letellier was made responsible to coordinate the RecorDIM Initiative Internationally. His role is to work towards increasing the number of Partner Organizations, and to invite them to create RecorDIM Task Groups to address the gaps and needs identified during Roundtable-1.

The brief reports hereafter provide an overview of the 5 RecorDIM meeting that took place during 2002.

1- Los Angeles RecorDIM Roundtable-1 Meeting

(March 4-5, 2002)

Summary

On March 4-5, 2002, the RecorDIM Initiative convened an international group of information users – conservation specialists of all trades, cultural resource managers, heritage program planners, etc. – to discuss their experiences with heritage recording, documentation and information management. A total of 23 experts from 12 countries, representing most regions of the world, participated in a two-day roundtable discussion to define user needs and suggest strategies to close the gaps between users and providers. In addition, the group developed a list of recommended next steps for RecorDIM over the next five years.

The group identified six general areas where actions were needed:

1. To improve perception and communication in recording, documentation and information management by:

   - disseminating information,

   - creating bibliographies, thesauruses, definitions,

   - creating focused newsletters

   - establishing integrated professional networks

   - encouraging joint symposia, seminars and tradeshows

   - involving the private sector and outside organizations

2. To integrate recording, documentation and information management activities into the conservation process

3. To increase financial and human resources for documentation by:

   - promoting RecorDIM benefits

   - writing related policies that ensure sustainable resources

4. To define, develop and promote documentation tools

5. To make available specific RecorDIM Training / Learning Programs

For each of these areas, the group developed a list of strategies to close the gaps between information user and provider and improve conservation recording practice.

The group called on RecorDIM Initiative Partners to use the gaps and needs as a framework for future activities. Further, it called on each of the partners to adopt the strategies and coordinate efforts to implement them.

Participants

The majority of participants were drawn from the information user community. They represent a broad diversity of disciplines and cultures, reflecting the variety of conservation activities and diversity of heritage recording experience in different regions of the world.

(Photo by Debbie Valenta)

Participants left to right

Back Row: Albini Soucy, Mitchell Bishop, Kalandar Kamalkhan, Carolina Castellanos, Paul Box, Paul Bryan, Giora Solar, Francoise Descamps, Shin Maekawa, Mary Hardy, Chris Gray;

Front Row: Rand Eppich, Robin Letellier, Jack Vandenberg, Marieke Kipers, Wierner Schmidt, Peter Waldhausl, Blaine Cliver, Francois LeBlanc, Jovo Grobovsek, Lori Wong

(Not in the photo: Jeanne Marie Teutonico and Gaetano Palumbo)

Conclusions

The roundtable succeeded in producing a list of significant gaps and needs that provides a clear framework for the work of the RecorDIM Initiative over the next five years (see pages 9-11 of the Roundtable-1 report). In addition, the group identified many strategies to promote heritage recording activities and to address the gaps and needs.

Importantly, the spirit and participation of attendees was high during the entire meeting, and their feedback was positive in all respects. This two-day exchange was a meeting of minds between three international groups, the partners that are now engaged in supporting the RecorDIM Initiative.

Participants were asked to commit themselves to work at resolving some of the gaps and needs. François LeBlanc for the GCI indicated an interest in guidelines, handbooks and training. Representatives of the U.S. National Park Service, English Heritage and Parks Canada, three major heritage conservation organizations, had the opportunity to consider common issues. The three began discussing the possibilities of pooling resources to address shared needs in their organizations and conducting outreach to the international community. On an individual level, many expressed a high level of commitment to the success of the initiative.

Next steps

At the conclusion of the roundtable, participants made a number of recommendations for carrying forward their findings:

The group recommends that the above list of gaps and needs be used by the RecorDIM Initiative Partners (ICOMOS, CIPA, GCI) as a framework to promote, define and coordinate future activities and to encourage other organizations to participate to this project. (This list should be considered preliminary; it will be presented, discussed and expanded during the CIPA RecorDIM Task Group meeting in Corfu in August 2002 and at the ICOMOS RecorDIM meeting in Madrid in December 2002.)

The participants also recommend that the RecorDIM Partners be responsible for coordinating at least one task each. This would give the Initiative a good start by ensuring institutional support and a certain level of sustainability to the project. For example, the need to develop more training programs could be shared by CIPA's Working/Task Groups, ICOMOS' Scientific Committees and National Committees as well as ICCROM's Seminars. National conservation organizations, such as English Heritage, Parks Canada and the U.S. National Park Service, could also participate as could universities such as Columbia University (New York), University of Pennsylvania (Philadelphia) and the University of Leuven (The Netherlands).

At this date, it is likely that ICCROM and UNESCO will join the current RecorDIM Partners to help deliver this five-year Initiative. In this situation, it is hoped that each of the five main areas of needs or gaps could become the responsibility of one partner organization, for instance, The GCI could oversee efforts in the area of Perception / Communication. ICOMOS could be responsible for activites in Conservation Process. UNESCO could oversee the Resources area; CIPA, Tools and ICCROM, Training and Education. This shared responsibility could become the basis for the RecorDIM Initiative five-year plan with a RecorDIM Partners' Group (composed of one representative from each partner organization) that would coordinate the overall RecorDIM Initiative activities.

2- London RecorDIM Meeting

(August 27 2002)

English Heritage RecorDIM Presentation

Paul Bryan, Metric Survey Team Leader and Head of the Photogrammetric Unit, English Heritage (EH), participated to the RecorDIM Initiative Roundtable-1. During this meeting it was recognized by Paul Bryan that a number of the gaps and needs identified during roundtable-1 (pages 9-11 of report) are applicable to some of EH current operational needs. These needs are mainly related to RecorDIM standards, training and publications.

As a follow-up to Roundtable-1, Paul Bryan invited Robin Letellier, RecorDIM International Coordinator, to present the RecorDIM Initiative to EH staff members that have a particular interest in the activities of Recording, Documentation and Information Management.

Purpose

The purpose of the London meeting / presentation was to provide EH with an understanding of the initiative benefits and potential activities at national and international levels.

Objectives

One of the objectives of the meeting was to discuss EH's intentions to develop and implement a RecorDIM training program that could benefit the UK as well as international conservation community at large.

Another objective was to discuss RecorDIM publication gaps and needs, so as to work towards filling some of the gaps expressed during Roundtable-1.

Participants

Fourteen people attended the presentation:

- Paul Bryan - Head, Metric Survey Unit

- Christopher Young - Head, World Heritage and International Policy

- Bill Blake - Metric Survey Unit

- Sarah Lunnon - Metric Survey Unit

- 5 … (Sarah & Paul, would you please add names of others including those at a remote site)

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- Christopher Gray - GCI RecorDIM Initiative Liaison Office

- Robin Letellier - RecorDIM Initiative International Coordinator

(Photo by Robin Letellier)

The presentation took place at EH Headquarters in London the week preceding the **CIPA RecorDIM Task Group-1** meeting in Corfu. It referred to the RecorDIM Vision (outlined in appendix A) that was presented during the CIPA Symposium in Potsdam in September 2001, and provided an overview of the RecorDIM activities that took place over the past 3 years (attachment 1). The discussions mainly referred to the objectives outlined above.

Task Groups

As stated during the presentation, the intention behind this 5-year initiative is to create Task Groups, composed of a mix of expertise, from partner organizations, to address GAPS / NEEDS identified during Roundtable-1.

Consequently, to meet the above objectives, Task Group <u>deliverables and timetables</u> <u>must be clearly defined</u> so that tangible results immerge from this Initiative. To ensure proper coordination, a '**Task Groups Operational Framework' concept** was introduced as an essential management tool to make RecorDIM work effectively. The first draft of this Operational Framework was introduced and is provided in appendix C as a guide to those defining RecorDIM Task Groups. Parts 3 and 4 outline the criteria and responsibility pertaining to the creation of new task groups.

English Heritage's Participation

The discussions that took place in London indicated that EH have, in many ways, needs that are similar to those expressed during the RecorDIM Roundtable-1. One of EH main interests was to understand how they could <u>participate actively</u> to / benefit from the RecorDIM Initiative.

(Sarah, you are in a better position (with Paul & Bill) to explain how well the presentation was received …and how you understand EH can benefit from this initiative? Could you please add a few sentences / paragraphs under <u>EH's Participation</u> and <u>Interim Steps</u> headings please)

Interim Step

Following the RecorDIM Initiative presentation, Paul Bryan reported that the presentation was well received by participants and that he was awaiting feedback from attendees on how EH may participate to the Initiative.

In the interim, Paul Bryan, Bill Blake and Sarah Lunnon discussed the areas where the Metric Survey Unit would like to participate, and drafted a preliminary document entitled "RecorDIM & English Heritage" (appendix I), which summarises their initial interests.

Next Steps

The key point discussed in London was the need for a clear "**RecorDIM Task Group Operational Framework**" document. The draft framework in appendix C will be discussed and refined in the first half of 2003, and will become a guideline for other partners to participate to the RecorDIM Initiative. It should also be used as a tool to coordinate / manage future activities of Task Groups.

To begin testing the attached **Operational Framework** document, it is suggested that EH and the GCI each propose RecorDIM Task Groups using as model the RecorDIM **Information Warehouse** Task Group Proposal in appendix D. It is hoped that by mid 2003, three to four task group proposals will be available for review, namely:

- the **RecorDIM Information Warehouse Task Group** Pilot / Model (Co-chaired by Natalie Bull – HCP-PWGSC and, in the beginning, Robin Letellier – CIPA);

- that would provide a knowledge of existing RecorDIM publications / documents for those interested in creating RecorDIM Task Groups, and for conservation experts at large.

- the **RecorDIM Generic Guidelines …Task Group** (Chaired by François LeBlanc - GCI);

  o that would provide an overview / framework that define / describe broad Recording, Documentation and Information Management principles and practices.

- the **RecorDIM Generic Handbook …Task Group** (Chaired by François LeBlanc - GCI);

  o that would complement the above Generic Guidelines by providing a brief description of most RecorDIM tools / technologies, with a brief understanding of their applications and their limitations; and

- the Re**corDIM Training re. Metric Survey Skills in Conservation Task Group** (Chaired by Sarah Lunnon – EH)

  o to provide effective training tools for the improved understanding of the process involved in the metric survey of historic buildings and ancient monuments.

It is therefore recommended that these 4 potential **Task Groups** be created hopefully during the first half of 2003, as prototypes to be presented to other RecorDIM partners as examples of RecorDIM outputs. They could also be used as models for presentation / discussion during the up-coming:

- **RecorDIM Plenary Session** of the CIPA 2003 Antalia Symposium (October 1, 2003)

- **RecorDIM Roundtable-3** that will take place immediately after the symposium in Antalya (i.e. in Turkey, on October 5-6, 2003);

- **ICOMOS Zimbabwe Pre-General Assembly Scientific Symposium & Advisory Committee Meetings** (October 12-15, 2003).

3- Corfu RecorDIM Meeting

(August 31 to September 3, 2002)

CIPA RecorDIM Task Group-1 Meeting

Purpose

As described in the **CIPA RecorDIM Task Group Meeting Memo** of August 14, 2002 (appendix J) the purpose of this meeting was to initiate discussion on how best CIPA and other RecorDIM Partners can work together to bridge some of the RecorDIM gaps and needs defined during Rountable-1.

Objectives

The main objectives consisted in providing answers to the following questions:

- **How** will **CIPA participate** to the RecorDIM Initiative?

- **What Task Groups** should be created to address some of the RecorDIM GAPs / NEEDs identified in the RecorDIM Roundtable-1 Report?

- **How** do we **INTEGRATE Information Users into** 'new Task Groups' to effectively address the RecorDIM gaps / needs, and

- **What will be the deliverables for** the newly created Task Groups?

Participants

Peter Waldhäusl, President
Robin Letellier, Vice President
Cliff Ogleby, Secretary General
Pierre Grussenmeyer
Gaetano Palumbo
Orhan Altan
Michael Doneus
Petros Patias
Klaus Hanke
Chris Gray (GCI)
Nuran Zeren Gülersoy (co-director, Antalya CIPA Symposium)

(Photo by Robin Letellier)

Discussion and Outputs

The RecorDIM session began with a PowerPoint presentation, by Robin Letellier, providing background information on the RecorDIM Initiative. He then briefly described the RecorDIM activities that took place since the September 2001 CIPA Symposium in Potsdam, and provided an overview of the RecorDIM action plan for 2002-3.

Although much of this RecorDIM background information had been made available to CIPA's executive prior to the Corfu meeting, the role of CIPA in RecorDIM was still not clear to all participants.   Consequently, a significant portion of the time dedicated to this meeting was used to explain the benefits of the initiative and clarify the purpose and objectives of the partnership.

In summary, the RecorDIM Initiative was defined as:

> " an international 5-year (2002-07) partnership between international heritage conservation organizations working together to bridge the gaps that currently exist between the **information users** (researchers, conservation specialists of all trades, project managers, planners etc.) and the **information providers** (photographers, heritage recorders, photogrammetrists, surveyors, etc.).
>
> The purpose of the initiative is to bring information users and providers together to identify the nature of the gaps between them, to develop strategies to close the gaps, and to recommend a framework for actions to be coordinated by the RecorDIM Initiative over the coming five years."

This discussion was most important to ensure good understanding of the role of the RecorDIM Initiative, and to get CIPA's full participation in the future. As a result, CIPA re-confirmed its full commitment to the RecorDIM Initiative.

One of the main outcomes from the above discussions was the proposal of a new structure for CIPA Working Groups. In the beginning, the new working groups would relate to the following 5 conservation application areas:

- Archaeological Heritage

- Architectural Heritage

- Urban, Natural and Cultural Landscapes

- Moveable Heritage

- Heritage Management

Such a new structure would allow information users to recognize themselves in CIPA activities, and to participate in bridging gaps identified in pages 9-11 of the RecorDIM Roundtable-1 report.

This proposal was adopted for further development and implementation during the CIPA Antalya 2003 Symposium. It was also agreed that all future CIPA working groups would be co-chaired by both an **Information User** and an **Information Provider**. This is to ensure that a 'permanent bridge between Users and Providers' is integrated at the coordination level of each working group.

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RecorDIM Task Groups

(Photo by Robin Letellier)

During the Corfu week, much discussion revolved around WHO could / would initiate / create WHAT RecorDIM task group(s) within CIPA? As mentioned above, the concept / benefits of RecorDIM task groups were not fully understood during the initial Corfu discussions and consequently no clear proposal could be made during the first day of meetings.

However, as the week progressed, many ideas were discussed, and a preliminary list of possible task groups was produced during the lunch meeting of Sept. 3 (photo above). They are:

1. a Task Group to develop a general concept of landscape monitoring systems for WH sites as a basis for WH contracts

2. a Task Group on 'Non Professional Recording as a complement to the professional'

3. a Task Group on Archaeo-GIS

4. a Task Group on Single images in conservation

5. a Task Group on a CIPA Summer Training School

6. a Task Group on Underwater Recording

Next Steps

Making reference to the RecorDIM 2002-3 Preliminary Plan that was presented at the beginning of the Corfu meeting (appendix A), it was mentioned that the RecorDIM Partners, through their liaison officers, would present the RecorDIM Initiative to ICOMOS, in Spain, that is:

- To the ICOMOS Advisory Committee members attending the Pre General Assembly meetings in Seville (November 28-29, 2002), and

- To the ICOMOS membership attending the General Assembly meetings and symposia in Madrid (Dec. 1-5, 2002)

It was also decided that the CIPA 2003 Antalya Symposium organizers would be given an opportunity to present the symposium program in Madrid. It was mentioned that a CIPA brochure would be designed and printed for the occasion.

It was proposed that a CIPA booth would be set up for the duration of the GA to show the best posters from the Potsdam 2002 CIPA Symposium, to promote CIPA's activities, and to handout information pertaining to the RecorDIM Initiative and Partnership.

All members of the CIPA Executive were specifically invited to attend the ICOMOS General Assembly in Madrid to meet with Information Users that need to better understand CIPA and its activities. This participation was also suggested as an opportunity for CIPA to get acquainted with Information Users throughout the GA meetings, but more precisely during the 6 Sessions of the ICOMOS Symposium, which dealt with the subjects of:

- Documentation
- Protection
- Conservation
- Monitoring
- Training
- Public Awareness

(CIPA booth at the ICOMOS General Assembly meeting – Madrid – Dec. 1-5, 2003)

(Photo by Robin Letellier)

4- Seville RecorDIM Meeting

(November 29, 2002)

RecorDIM Presentation - ICOMOS Advisory Committee

Invitation

The following invitation letter was sent to ICOMOS members attending the Pre-Assembly meeting in Seville.

> *September 2002*
>
> *Dear participants to the Pre-Assembly meetings:*
>
> *As reported in the ICOMOS News this spring, ICOMOS, CIPA and the Getty Conservation Institute (GCI) entered into a 5-year partnership called the RecorDIM Initiative. This initiative consists of working towards 'bridging-the-gaps' that currently exist between the Information Users (researchers, conservation specialists of all trades, project managers, heritage program planners, etc) and the Information Providers (photographers, heritage recorders, photogrammetrists, etc).*
>
> *Giora Solar presented the proposed RecorDIM Initiative at the ICOMOS Executive Committee meeting in Dubrovnik last October. The Executive supported the Initiative and requested a plan of action.*
>
> *As announced at http://www.international.icomos.org/madrid2002/recordim.htm (see last paragraph), a RecorDIM Initiative Status Report and 5-Year Plan will be presented during the ICOMOS Pre-Assembly meetings in Seville. This presentation will take place on November 29, during breakfast (beginning at 08:30 h, at the NH Plaza de Armas Hotel. Address: Avda. Marqués de Parada s/n. Sevilla).*
>
> *The presentation will give an overview of the RecorDIM Initiative, and provide an opportunity for all to discuss how ICOMOS can participate to / benefit from the RecorDIM Initiative.*
>
> *RecorDIM Initiative Partners and Liaison Officers*
>
> *ICOMOS - Giora Solar*
> *GCI - François LeBlanc*
> *CIPA - Peter Waldhäusl*
>
> *RecorDIM Initiative International Coordinator*
>
> *Robin Letellier*

Introduction

As mentioned above, ICOMOS is one of the RecorDIM partners and therefore hosted this meeting. Giora Solar, ICOMOS' RecorDIM Liaison Officer, made the opening remarks.

(Photo by Robin Letellier)

Participants

Approximately 30 members of the ICOMOS Advisory Committee attended the presentation. They represented a number of ICOMOS Scientific Committees and National Committees from Israel, Netherlands, USA, Slovakia, Slovenia, Estonia, Fiji, Australia, Mauritius, Spain, Korea (Rep. of), UK, Czech Republic, Austria and Canada (see partial list of participants in appendix L).

(Photo by Robin Letellier)

Presentation

The meeting began with a PowerPoint presentation by Robin Letellier (Attachment 2), which provided participants with an overview of the following RecorDIM activities that took place over the last few years.

- **Background**
  - CIPA Outreach Workshops
    - Gross Siegharts – Austria (1996)
    - Meistran - Sweden (1997)
    - Puerto de Galinas - Brazil (1999)
- **RecorDIM Initiative Proposal & Partnership**
  - Potsdam - September 2001
- **RecorDIM Roundtable-1 meeting**
  - Los Angeles - March 2002
- **RecorDIM Partners**
- **RecorDIM Report on GAPS & NEEDS**
- **RecorDIM Web Presence**
- **RecorDIM Task Groups**
  - Definition & Framework
  - Task Groups in the making:
    - **GCI**
      Guidelines
      Handbook
    - **ICOMOS**
      Case Studies
    - **CIPA**
      Monitoring
    - **English Heritage**
      Training
    - **PWGSC (for Parks Canada)**
      Conservation Processes
      Information Warehouse
- **Discussion Items**
  - Additional RecorDIM gaps and needs !?
  - Priority RecorDIM Task Groups !?
  - Next steps / ICOMOS participation !?

Details pertaining to most of the above activities can be found in the appendices and attachments to this report (see list of appendices at the end of the report). The 'RecorDIM Web Presence" mentioned above will soon include current and future information / activities / outputs pertaining to the RecorDIM Initiative. This presence can be found at: http://recordim.icomos.org/index.html

Outcome

From the questions raised at the end of the presentation, it can be said that the RecorDIM Initiative was well received by the ICOMOS Advisory Committee members that attended this meeting.

Many of the gaps and needs outlined in the RecorDIM Roundtable-1 report seemed familiar to most participants. It was obvious that there is an interest in, and a need for such a 'bridging the gap' initiative.

From the remarks and ideas that immerged from the dialog that took place, it is clear that RecorDIM gaps / needs exist not only at the international level, but also within a good number of the ICOMOS Scientific and National Committees.

In summary, a good part of the discussion related to the 4 presentation items hereafter. Questions relating to "**WHO can participate to the RecorDIM Initiative**" and "**HOW does one become active in this project**" were discussed is some detail and are somewhat summarized hereafter:

1- RecorDIM Participation Questionnaire

It was mentioned that there are four levels of participation to this initiative, that is:

      A.   to be on the RecorDIM distribution list;

      B.   to post 'copyright free' RecorDIM related documents on the RecorDIM web site;

      C.   to assist a RecorDIM Task Group;

      D.   to create a RecorDIM task Group.

To participate to the RecorDIM Initiative, the 'Participation Questionnaire' in appendix E must be filled out and sent to: Letellier.R@Sympatico.ca

2- RecorDIM "Task Group Proposal" Form

For those interested in creating a RecorDIM Task Group, a "**Task Group Proposal Form**" (appendix F) has been developed as a tool for managing this activity. This form will be tested during the first half of 2003, and will be refined this summer. It should be implemented this fall after the RecorDIM Roundtable-3 meeting (October 5-6, 2003) in Antalya.

As mentioned earlier, the proposal that was developed for the creation of the **RecorDIM Information Warehouse Task Group** is provided in appendix D as an example. It should be used as a model by those preparing task group proposals.

3- RecorDIM Task Group Operational Framework

To ensure that each task group is properly defined and meets selection criteria, a draft **Operational Framework** document has been produced (appendix C). This Framework will be

reviewed this spring and refined this summer, and should be implemented this fall during Roundtable-3.

4- The RecorDIM "Information Warehouse"

As stated in the Information Warehouse Task Group Proposal (appendix D), the purpose of this Warehouse is to provide those interested in creating RecorDIM Task Groups, with a knowledge of existing publications / documents on the following RecorDIM topics:

- Policies
- Guidelines
- Standards
- Inventories
- Processes
- Handbooks
- Tools / Handbooks
- Training
- Best Practices

The specific **Warehouse objectives** are:

- To provide conservation specialists worldwide with a **'one stop' web site** for information on RecorDIM activities;

- To compile as many RecorDIM reference documents as possible for Conservation Organizations that wish to develop RecorDIM practices in their country;

- To provide information on new RecorDIM practices, tools and technologies, as soon as they are made available.

Closing Remarks

At the end of the presentation, the following GCI, CIPA and ICOMOS RecorDIM Liaison Officers were invited to say a few words about the Initiative.

François LeBlanc, GCI representative**,** indicated that the session in Seville was an opportunity for the RecorDIM Partners to explain the initiative to the members of the Advisory Committee, and to discuss how Committee members could get actively involved. He mentionned that the GCI would be looking into bridging a few gaps, namely RecorDIM guidelines and related Handbook. He invited the Presidents of the National and Scientific Committees of ICOMOS to meet with the RecorDIM Liaison Officers present in Seville to discuss their interests in the RecorDIM initiative.

Peter Waldhäusl, CIPA representative, confirmed the support of his committee for the Initiative and suggested that it would like to tackle several gaps such as documentation standards and guidelines that would be used within the framework of monitoring World Heritage Sites,

developing new easier to use field recording equipment, a summer school for recording and documentation, and video clips on how to apply certain techniques.

Giora Solar, ICOMOS representative, also confirmed the support of his organization for the Initiative. He mentioned that if there is a common need for all ICOMOS Scientific committees, it is documentation and information management. He said that RecorDIM will certainly benefit all ICOMOS committees and is probably a good example of the sort of activity that can help to bridge the actions across the organization. He also said that as long as he would be Treasurer General of ICOMOS, that there would be a line item in the organization's budget for this Initiative.

Next Steps

From the positive feedback received in Seville, it was suggested that the RecorDIM Initiative be introduced to all members of ICOMOS National and Scientific Committees. It should also be circulated to all conservation organization subject to be interested in participating to the Initiative.

It was also mentioned that this dissemination be done by way of the Internet:

- by reporting on the RecorDIM 2002 Activities that were presented during the meeting;

- by requesting Partner Organizations to circulate the report as widely as possible;

- by posting the report on the RecorDIM web site at:
  http://recordim.icomos.org/index.html

Potential Partner Organizations such as ICCROM, UNESCO-WHC, TICCIH, ICOM, WAC, etc, should also be informed of the RecorDIM Initiative and its related benefits. They should soon be invited to participate.

It should be mentioned that other national Conservation Organizations, comparable to English Heritage and the Heritage Conservation Program for Parks Canada[1], have recognized the need to address / resolve some of the RecorDIM gaps identified in Roundtable-1 report. It was suggested that such organizations be contacted and encouraged to create RecorDIM Task Groups to fill identified gaps. Such organizations, with common needs, could collaborate by creating a joint RecorDIM Task Group to resolve gaps that would benefit all collaborators, as well as other organizations with similar needs.

As pointed out by Giora Solar in his closing remarks (above), "the *RecorDIM Initiative will certainly benefit all ICOMOS committees and is probably a good example of the sort of activity that can help to bridge the actions across the ICOMOS organization*". This remark was turned into a proposal to the ICOMOS Advisory Committee during its Pre-General Assembly meeting in Seville.

---

[1] Heritage Conservation Program (HCP) (i.e. HCP is a Division of Public Works & Government Services Canada (PWGSC) Real Property Services for Parks Canada – known as HCP)

(the Advisory Committee during its Pre-General Assembly meeting in Seville)

(Photo by Robin Letellier)

In short, the proposal suggests that a 2 to 3 day Advisory Committee Workshop be organized the week prior to the up-coming Zimbabwe ICOMOS General Assembly, to review common gaps and needs, and to work towards bridging actions across the Scientific Committees. This proposal was sent to D. Bumbaru, Secretary General of ICOMOS, in January 2003 (appendix M).

The RecorDIM Liaison Officers support such a workshop proposal and are prepared to participate actively to it should the proposal be retained / implemented by the Zimbabwe / ICOMOS GA Organizers. This proposal should be forwarded to the newly elected Vice-President of ICOMOS ISC, when he is officially appointed to the position in the first half of 2003.

5- Madrid RecorDIM Roundtable-2 Meeting

(December 3, 2002)

Invitation

Last summer, the following RecorDIM Roundtable-2 invitation was made to all ICOMOS members via the ICOMOS Secretariat:

August 2002

Dear colleagues,

As announced in the ICOMOS News 2002, and recommended in the Roundtable-1 report, a RecorDIM Roundtable-2 is being planned to take place during the ICOMOS General Assembly in Madrid. It was suggested that the ICOMOS Symposium Documentation Day (3 December – Section 1) be used as the platform to address some of the gaps and needs identified in the RecorDIM Roundtable-1 report. This suggestion was accepted by ICOMOS.

Consequently, the Documentation Day will have a focus on the above-mentioned RecorDIM GAPS and NEEDS. Thus, the Documentation Session Work Group would like to invite those interested in presenting papers during Section-1, to relate their presentations to any of the RecorDIM gaps / needs listed on pages 9 - 12 of the Roundtable-1 report. The issues included by participants will be discussed in a RecorDIM Roundtable-2 that will take place during the last-third of the Documentation session.

Another result of Roundtable-2 will be to discuss the up-coming Antalya 2003 CIPA Heritage Documentation Symposium (http:// www.cipa2003-antalya.org) and to receive recommendations on how this symposium could be structured to better benefit ICOMOS' conservation specialists and their RecorDIM needs at large.

We are looking forward to receiving your abstracts (at secretariat@icomos.org) ,

RecorDIM Initiative Partners and Liaison Officers

ICOMOS - Giora Solar
GCI - François LeBlanc
CIPA - Peter Waldhäusl

RecorDIM Initiative International Coordinator

Robin Letellier

Documentation - Section 1

As indicated in the above invitation letter, Rountable-2 was integrated to the Symposium's Documentation Section 1. Blaine Cliver, Chair of Documentation Section-1, and Robin Letellier, RecorDIM Coordinator, managed this integration in consultation with speakers selected for the session. As a result, the RecorDIM Roundtable-2 agenda in appendix G was accepted by ICOMOS.

By reviewing the Roundtable-2 agenda, one can appreciate that all speakers adjusted their presentations to address areas of gaps and needs in RecorDIM. Speakers presenting papers during the first part of this session were invited to conclude their presentations with generic remarks on RecorDIM gaps and needs. Those speaking during the second half of the day were requested to focus their papers on RecorDIM problems that were encountered during their recording work.

As a result, papers presented provided session participants with a good understanding of the scope / variety / levels of RecorDIM problems and issues currently being dealt with by many conservation specialists worldwide.

Roundtable-2 Rapporteur's Report

Giora Solar was Rapporteur for Roundtable-2. The report he presented at the ICOMOS General Assembly Plenary Session, on December 5, will be published in the symposium proceedings. The following paragraphs were extracted from his report as they summarize well what took place during Roundtable-2:

> "*The objectives of roundtable 2 were to expose the RecorDIM Initiative to wider audience, to identify additional gaps and to start the process of creating task groups to work on the identified gaps.*
>
> *A presentation of the initiative by its international co-ordinator was followed by five short presentations.*
>
> *The presentation brought the experience of the presenters through specific projects (from a small town in Nepal to a survey of German 1940's weather stations in the North Sea, to conservation of heritage landscapes and to experience in working with national organization and private sector and finally to training and working with students).*
>
> *Each presenter was asked to try and specify gaps and needs which they faced or identified during their work.*
>
> *In addition to the previous identified issues the presentation raised similar ones or new ones - ranging between issues regarding public awareness and education, to need for guidelines, needs for special documentation for landscapes and carrying capacity studies, needs for training of both users and providers to be able to work together and a wide range of gaps and needs referring to the electronic media. Such are issues of copyright for digital data, access to private archives and data, information sharing systems which will not disclose information storage. One of the presenters suggested that we talk about filling the gaps rather than bridging them, and the discussion which followed the presentation raised suggestions such as having users and providers participate in each others work to change the situation, which was defined as "fear" of users from providers or some concern that fascination by modern technologies might*

result in loss of knowledge of how to use old traditional techniques, still very useful in the field of conservation.

The following of the roundtable included presentation of the next CIPA meeting in Antalya 2003 as well as collecting suggestions from all participants on possible task groups to work on the gaps and needs; Several suggestions were in the direction of using case studies and their analysis and on the participant suggested to focus on problems rather than solutions.

A participation questionnaire has been distributed to follow up on the roundtable and to identify those interested to be active in different ways in the RecorDIM initiative. The questionnaire presents a concept of information warehouse web presence and its address, and encourage participants to use it and to provide information to be posted to the information warehouse through its information co-ordinator, Mr. Robin Letellier.

The roundtable has achieved its immediate goals but as with many other initiatives the real success depends on the follow up and on the level of commitment and activity by each partner and interested participant.”

Documentation Section 1 - Rapporteur Report

Richard Mackay, from Australia, was the Rapporteur for the entire Documentation Section 1 of the Symposium. His report (appendix K) provides a good summary of the papers presented. It is broken down into the following headings:

- Gaps in Knowledge and Existing Documentation
- Gaps in Methodology
- Technology to Fill the Gaps
- Other Gaps, and
- Recommendations made during the General Assembly plenary meeting.

CIPA report

As a follow-up to Roundtable-2, Peter Waldhausl, Past President of CIPA and current CIPA RecorDIM Liaison Officer, reported to CIPA on the activities that took place in Madrid. His report strongly encouraged CIPA membership to participate to the RecorDIM activities. The following statements are extracted from his report:

“It is now CIPA’s duty to offer co-operation to other RecorDIM partners in non-CIPA RecorDIM Task Groups, as well as to offer also a well defined project for a RecorDIM Task Group of CIPA . For the latter I see several possibilities:

1. Advancing the field recording techniques:
Integration of Geodedic and photogrammetric recording techniques and software development for on site recording (Motorized total station with cameras, Michael Scherer, Bochum) and the socalled simple and cheap recording techniques based on rectification and perhaps photomodeler, specially important for damaged objects and remote sites. This should be forwarded and financially assisted by ISPRS and perhaps by the 6. European Framework Program.

2. *Development of Guidelines for the use of Laser Scanning for Heritage Recording as well as for Monitoring*

3. *Preparation of a course on Laser Scanning in Conservation for a summer school*

4. *APIS and the CIPA 3x3 Rules as a means for faster first recording of sites as well as for additional recording and monitoring*

5. *Development of technical guidelines for UNESCO World Heritage Sites, general aspects, special recommendations for types of them with similar conditions, further some special cases selected as examples.*

6. *Development of a general and global framework for Heritage Information Systems.*

So, what we need early in 2003, are good project proposals which we could offer as CIPA Projects as a contribution to the RecorDIM initiative. CIPA can always offer its network of experts. But for a specific task and for specific work: Who of CIPA wants to take over the responsibility for a 4 year research program?"

Next Steps

(see **Proposed RecorDIM Action Plan for 2003-4** below)

Summary of RecorDIM 2002 Outputs

This summary provides an overview of the prime outputs that resulted from the 2002 RecorDIM activities. It lists the products of 2002 that set the basis for promoting and managing this 5 year Initiative (2003-07).

RecorDIM Roundtable-1 Report

Roundtable-1 was sponsored by the GCI to define the nature and scope of gaps to be bridged. The first 12 pages of the report (Appendix B) summarize the discussions, outputs and recommendations that immerged from the meeting.

The key element of this report is the list of RecorDIM Gaps and Needs (pages 9 to 11) that was generated at the end of roundtable-1. This list has become central to the RecorDIM Initiative in that it is used as a Framework of Gaps to be address.

This list will be revised during the course of 2003 to include feedback from RecorDIM meetings that followed roundtable-1. This refined list will become THE FRAMEWORK for defining RecorDIM Task Groups (Appendix R).

RecorDIM 2002-3 Action Plan

This action plan was prepared immediately after Roundtable-1 to provide RecorDIM Partners / Liaison Officers with direction for the 2002 activities (appendix A). The action plan was followed closely to generate the results hereafter.

RecorDIM Web Presence

A RecorDIM web presence was created at http://recordim.icomos.org as a permanent address for participants and interested conservation specialists to communicate. Its current content is preliminary, and will evolve with new ideas, tools and results, as they are made available.

The web page structure will be discussed during the first quarter of 2003, and revised after the Vienna RecorDIM Partners' meeting of March 2003. This web presence should be fully operational by the second half of 2003.

RecorDIM Information Warehouse

RecorDIM Initiative participants are being invited to share existing information and publications that are related to RecorDIM activities. This information will be posted at http://recordim.icomos.org/warehouse.html under the **RecorDIM topics** listed.

The topics are based on the Roundtable-1 list of gaps and needs. It should be noted that this list is preliminary and will be refined during 2003, after receiving suggestions for improvements.

RecorDIM Task Group Operational Framework

This Operational Framework was requested to provide guidance to those interested in creating RecorDIM Task Groups. The draft Operational Framework in appendix C will be tested during the first half of 2003 together with the Task Group Proposal Form hereafter.

Both documents, when finalized, will become the main tool / guideline for creating and managing the RecorDIM Task Groups.

RecorDIM Task Group Proposal Form

This form is being tested with the first task group proposals in the making, and will be revised during the summer of 2003. It will be used to initiate additional RecorDIM Task Groups in the fall.

A model task group proposal is provided in appendix D for those preparing a proposal before the final version is made available.

RecorDIM 2002 Activities Report

This report briefly describes the main RecorDIM activities that took place in 2002. It is meant to provide heritage conservation practitioners worldwide with an overview of the RecorDIM Initiative and its recent outputs.

It reports on the RecorDIM action plan that was proposed in early 2002 (appendix A).   It should be of interest to those attracted by the Initiative, and that whish to look into the approach taken by /exchange between current RecorDIM Partners.

RecorDIM Task Groups

There are currently about a dozen task group ideas being discussed. They are listed hereafter by Partners (and potential Partners) as a preliminary list of possible task groups.

Of this number, there are 5 to 6 Task Groups in the making. It is anticipated that 4 of these will be reviewed during the up-coming RecoDIM Partners' meeting in Vienna (March 23-25, 2003), and hopefully implemented this summer.

Once accepted by RecorDIM Liaison Officers (representing each Partner), these Task Group proposals will be identified within the Framework of RecorDIM Task Groups in appendix R. Each proposal will be posted on the RecorDIM web site for the general understanding of their purpose, objectives and deliverables.

RecorDIM Task Groups in the making

The following task groups are currently being defined by the following Partner Organizations:

ICOMOS Scientific Committees

- *CIPA - Monitoring Guidelines (Peter Waldhäusl and Yuri Maslov – concept level)*

GCI

- *RecorDIM Guidelines (by François LeBlanc)*
- *RecorDIM Handbook (by François LeBlanc)*
- *RecorDIM Web Presence (by François LeBlanc - Robin Letellier)*

English Heritage

- *Training (by Sarah Lunnon)*

HCP- PWGSC

- *RecorDIM activities Integrated to the Conservation Process (by Natalie Bull)*
- *RecorDIM Information Warehouse (by Natalie Bull & Robin Letellier)(appendix D)*

Word Monuments Fund

- *GIS – a Management Tool for Archaeology   (by Gaetano Palumbo – concept level)*

Other Possible Task Groups (under discussion):

(Note that the following list is very preliminary and is provided here for feedback and editing from Liaison Officers before inclusion to this report)

CIPA

- *Training - Summer School (PW)*
- *Information Systems (PW)*
- *3D Laser Scanning (Wolfgang Böhler)*
- *Understanding and Communication between Partners (by P. Waldhäusl & G. Solar)*

(note that this task group is being suggested by RL in the Proposed RecorDIM Action Plan for 2003-4 - see hereafter . This task group needs to be discussed further in Vienna (March 2003) as part of the RecorDIM Strategy for the Antalia Roundtable-3 meeting)

ICOMOS National Committees

- *Australia – GIS Management Guidelines   (by Graham Brooks)*
- *Israel – Monitoring Guidelines for World Heritage Sites (by Giora Solar)*

US Parks Service

- *Landscapes RecorDIM Standards (by Blaine Cliver)*

Parks Canada

- *Underwater Archaeology - Training (by Robert Grenier)*

ICCROM

- *Training Seminar (by Alejandro Alva)*

Schoenbrunn Society

- *Heritage Information Systems for Historic Parks and Gardens (by Peter Waldhäusl)*

Proposed RecorDIM Action Plan for 2003-4

(draft for feedback from RecorDIM Liaison Officers)

This draft action plan is preliminary and will be discussed during the RecorDIM Partners meeting in Vienna this coming March. It is meant to provide RecorDIM Partner Organizations with an understanding of steps that should be taken during the next 2 years.

It will also be used as a basis for reporting on the 2003 RecorDIM outputs. It should be considered as a broad work plan for RecorDIM participants, and therefore should be agreed to by all RecorDIM Liaison Officers.

This plan will include:

Feb. 2003

Seeking new RecoDIM Partners

That is to invite the following organizations and / or potential Partners to participate to the March 2003 Vienna RecorDIM Partners' meeting:

- ICCROM
- WHC
- EH
- HCP of PWGSC
- US Parks Service
- Schoenbrunn Society (to be discussed with Peter Waldhäusl)

March 23-25, 2003

RecorDIM Partners' Meeting, Vienna, Austria

Agenda outline:

- Review / discuss RecorDIM Task Groups in the making
- Review RecorDIM Task Group Operational Framework
- Review RecorDIM web presence
- Discuss RecorDIM action plan for Antalya and next 2 years

(for more detail, see the preliminary agenda sent with the invitations for the Vienna meeting)

Sept. / Oct. 2003

Antalya 2003 CIPA Symposium *(Sept. 30 to Oct. 4)*

(Note to Liaison Officers - The text relating to Day-1 and Day-2 of the symposium (hereafter) suggests that we (liaison Officers) take a strong leading role in working towards linking the RecorDIM Initiative to the activities of CIPA)

Introduction (draft for feedback)

It is proposed that, at the beginning of Day 1, the two first Keynote Speakers represent ISPRS and ICOMOS, and talk respectively about their organization's interest in CIPA's activities. This understanding should be spelled out so that symposium participants understand how ISPRS and ICOMOS benefit from CIPA's activities.

The third speaker should represent Information Users at large (i.e. ICCROM, UNESCO-WHC, ICOM, WMF, TICCIH, WAC, etc., other than ICOMOS), and talk in generic terms about how they could benefits from the RecorDIM Initiative and the many networks that will be created.

Consequently, by focusing on the need for better integration of activities between Information Users and Providers, this Plenary Session would somewhat underline the need for, and importance of filling the gaps identified during Roundtable-1.

This Session would have for aim to remind participants of the RecorDIM Initiative main goals, which are to strengthen links between Users and Providers, and to deliver the highest level of Task Group results during this 5 year Initiative (i.e. 2003-2007)).

Therefore, the following Plenary Sessions contents are proposed:

(… for discussion with the Liaison Officers and CIPA President and SG in Vienna)

Sept. 30

Day 1 - CIPA Plenary Session

With the above introduction in mind, the 3 invited Keynote speakers could each be requested to address one of the following questions (or perhaps other questions?):

- The opening remarks could explain Why CIPA is now referred to as the ISPRS-ICOMOS International Committee for Heritage Documentation

  (followed by 3 presentations of 30 minutes each on …)
- What is ISPRS' role in CIPA (Peter Waldhäusl or Cliff Ogleby or Petros Patias)
- What is ICOMOS' role in CIPA (Gustavo Araoz or Giora Solar or Dinu Bumbaru)
- What is the RecorDIM Initiative (… its Task Groups, Operations and Benefits)
  (Giora Solar or Dinu Bumbaru or Tom Hassall or Francois LeBlanc)

October 1

Day 2 - Proposed RecorDIM Plenary Session

Day 2's Plenary Session provides sufficient time to have a short introduction to the Session, and 4 papers presented.

It is therefore proposed that the RecorDIM Partners invite 4 speakers to talk about Heritage Conservation "Bad Practices" (as opposed to "Best Practices")(… this was Giora's idea in Madrid). Therefore, this session would focus on RecorDIM problems / concerns that would be presented as significant gaps and needs in conservation practices!

The purpose of this session would be to sensitize participants (especially Providers) to what does not work well in many current conservation practices. These problems could range from project planning issues, to understanding levels of recording and related accuracies, to defining scope of documentation, to understanding tools, to ensuring good information management, etc.

Therefore, referring to the Corfu RecorDIM meeting outputs on proposed future CIPA Working Groups (see Part 3 / page 16 of this report), speakers would relate their papers to one of the conservation areas discussed in Corfu, such as:

- Architectural Case Study (by Andrew Powter - Canada)

- Archaeological Case Study (by Giora Solar - Israel)

- Intangible Heritage Case Study (by Cliff Ogleby - Australia)

- Conservation Management Case Study (by Kalandar Shedor Kamalkhan - Kenya)

(note to Liaison Officers – suggestions for other speakers and subjects are welcome. Final decisions could be made in Vienna)

October 5 & 6

RecorDIM Roundtable-3

(Note - This is a draft proposal for feedback in preparation for the Vienna RecorDIM Partners Meeting)

It is suggested that this two-day meeting be broken-down as follows:

Day 1   (9:00 to 12:00 hrs)

Present RecorDIM Partners outputs from the Vienna Partners meeting
(moderated by RL)

> This half-day will ensure that all Partner Organizations are updated on the RecorDIM Task Group Framework and Management Tools that were discussed during the Vienna Partners meeting.

Day 1   (14:00 to 17:00 hrs)

Ensuring Communication & Understanding between RecorDIM Partners
(moderated by PW & GS)

This half-day will ensure that the role of, and relationship between the RecorDIM Partner Organizations are well understood and defined. This understanding must be clear at the beginning of this 5-year initiative to make sure we generate the highest level of motivation and participation as possible.

Day 2 (9:00 to 13:00 hrs)

Implementing the 5-Year RecorDIM Initiative (moderated by RL)

This half-day will review the 5-year RecorDIM plan that should be defined during the first half of 2003. It will look at current and newly proposed RecorDIM task groups and will provide feedback to Partners responsible to manage these task groups.

It will discuss the missing ingredients that are needed to strengthen the RecorDIM networks and to ensure participation worldwide.

October 2003

Zimbabwe's ICOMOS Pre-General Assembly

Advisory Committee Meetings

A workshop of Chairs of ICOMOS Scientific Committees is being planned to take place during the Pre-Assembly meetings in Zimbabwe. It is therefore proposed that RecorDIM Liaison Officers participate actively to this meeting:

- by inputting to the workshop discussions

- by reporting on the RecorDIM 2002-3 activities

- by reporting on the outputs of Roundtable-3

- by inviting ICOMOS ISC to participate actively to RecorDIM Task Group activities

(note that 2 years ago RL proposed to present a paper on the RecorDIM Initiative re. the Zimbabwe GA meeting, and it was selected by the organizing committee. RL was contacted again on Feb. 25, 2003 to resubmit this paper! So, we should have a slot to present the RecorDIM Initiative in Zimbabwe!?)

February 2004

HCP-PWGSC RecorDIM Task Group Meeting

- Date and activity being discussed
- To be organized by Natalie Bull
- Ottawa, Canada

May 2004

EH RecorDIM Task Group Meeting

- Date and activity being discussed
- To be organized by Sarah Lunnon
- London, UK

July 2004   *(12-23 July)*

Istanbul ISPRS Congress 2004

CIPA Session

During the ISPRS 2004 Congress in Istanbul, there will be a Session dedicated to CIPA. This will be an opportunity for RecorDIM Partners:

- to report on their 2002-3 activities

- to increase the understanding of the RecorDIM Initiative

- to describe RecorDIM benefits to Partner Organizations, and,

- to invite ISPRS to participate to RecorDIM Task Group activities.

(We will discuss this with Petros in Vienna)

Appendices (included with this report)

A. *RecorDIM 2002-3 Preliminary Action Plan*

B. *Roundtable-1 Report (first 12 pages)*

C. *RecorDIM Task Group Operational Framework*

D. *RecorDIM Information Warehouse Task Group Proposal*

E. *RecorDIM Participation Questionnaire*

F. *RecorDIM Task Group Proposal Form*

G. *Roundtable-2 Agenda – Madrid – December 2002*

H. *RecorDIM Partners Meeting Agenda – Vienna – March 2003*

I. *RecorDIM & English Heritage*

J. *RecorDIM CIPA Corfu Meeting Memo*

K. *Documentation Section-1 Rapporteur's Report (by R. Mackay)*

L. *RecorDIM Presentation to ICOMOS Advisory Committee – Meeting Participants (Seville, Nov. 2003)*

M. *Advisory Committee Workshop Proposal (re. Zimbabwe GA)*

N. *RecorDIM PowerPoint presented in Seville and Madrid*

O. *N / A (removed)*

P. *List of ICOMOS Scientific Committees & Chair Person(s)*

Q. *Outline of RecorDIM Gaps and Needs*

R. *Framework of RecorDIM Task Groups*

Attachments (provided separately)

1. *Table of RecorDIM Activities since 2000 (Excel format)*
2. *RecorDIM PowerPoint presentation given to the ICOMOS Advisory Committee in Seville, and to participants of RecorDIM Roundtable-2 in Madrid*
3. *RecorDIM Task Group Operational Framework (to be added later)*
4. *RecorDIM Photo Album – 2002 Meetings (to be added later)*

Appendix A

RecorDIM 2002-3 Preliminary Plan
5-Year RecorDIM Initiative

Robin Letellier
RecorDIM Initiative International Coordinator

(Spring 2002)

This **Preliminary Plan** complements the December 2001 **RecorDIM** (**Recor**ding, **D**ocumentation and **I**nformation **M**anagement) **Initiative Status Report** that was posted on the CIPA Website earlier this year (http://cipa.icomos.org/reports.html). The following pages briefly describes some of the RecorDIM activities that took place since the CIPA Potsdam Symposium (September 2001) and provides an outline of what is in the planning for the next two years.

Background - Potsdam's 'Bridging-the Gap' proposal

For many years, there has been a perception that CIPA is a highly technical scientific committee concerned with state-of-the-art technologies for the recording of cultural resources. Although CIPA is working to change this perception, it is still felt by many that there are gaps to bridge between the activities of '**Information Users'** (i.e conservation architects, archaeologists, art historians, heritage site managers, etc.) and of '**Information Providers'** (i.e. heritage recorders, photogrammetrists, building surveyors, photographers, etc.).

Between 1999 and 2001, CIPA's Working Group-1 and the Getty Conservation Institute (GCI) have worked at developing a concept to bridge gaps that exist between Information Users and Providers. This concept, entitled "**The Recording, Documentation and Information Management (RecorDIM) Initiative**" was proposed during CIPA's Symposium in Potsdam last September and was well received by participants, and **recognized as timely** by CIPA, ICOMOS, UNESCO and ICCROM, all present at the CIPA Symposium.

As a result of the RecorDIM proposal, a **Partnership was initiated between ICOMOS, CIPA and the GCI** (see the ICOMOS News 2002 (#1)).   Other heritage conservation organizations are invited to join the RecorDIM Initiative. The goal of this partnership is to raise the level of conservation practices through the provision of supplementary guidance, training and information dissemination.

Definitions

To facilitate understanding / dialog during RecorDIM meetings, definitions are provided in appendix A. They are taken from the **Heritage Recording, Documentation and Information Management Guidelines for world Heritage Sites** manuscript that was developed in the mid nineties with the participation from ICCROM, ICOMOS and UNESCO.

The Vision

The following page summarizes the **RecorDIM Initiative Vision** that was presented during the CIPA Symposium in Potsdam:

Figure 1 illustrates the RecorDIM Initiative challenges ahead of us, which consists of 'bridging the gaps' between the information Users and Providers, by working towards sharing knowledge, transferring skills and integrating activities to raise the level of conservation practice worldwide.
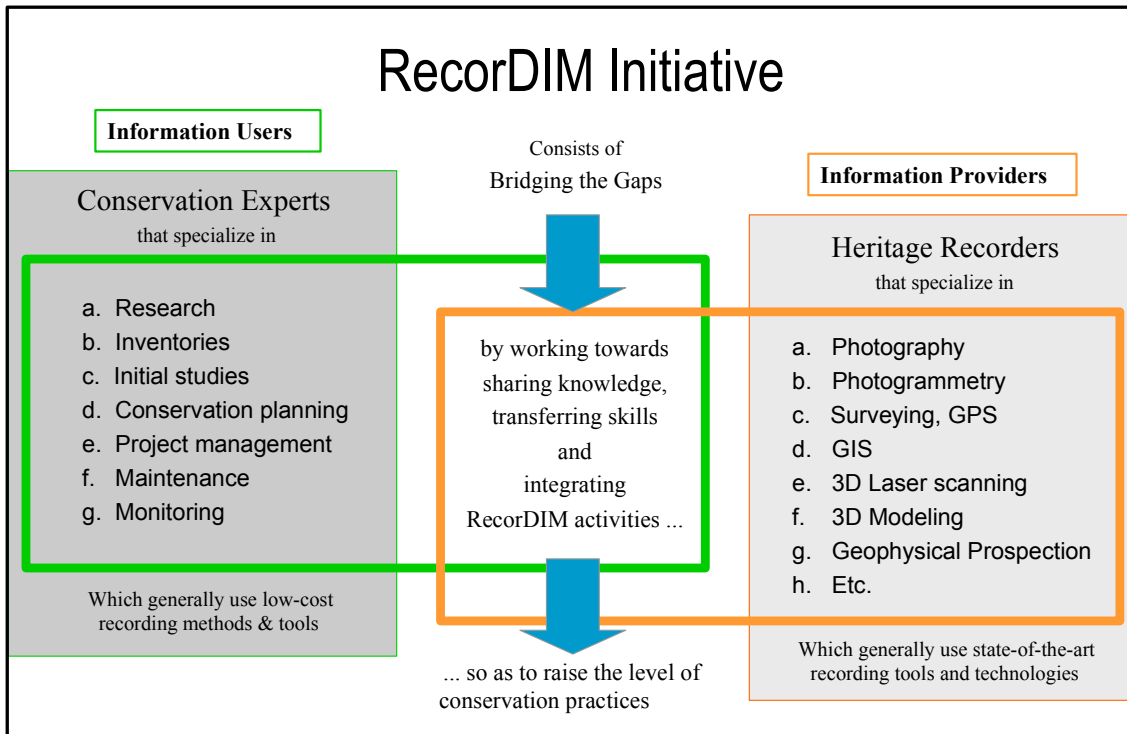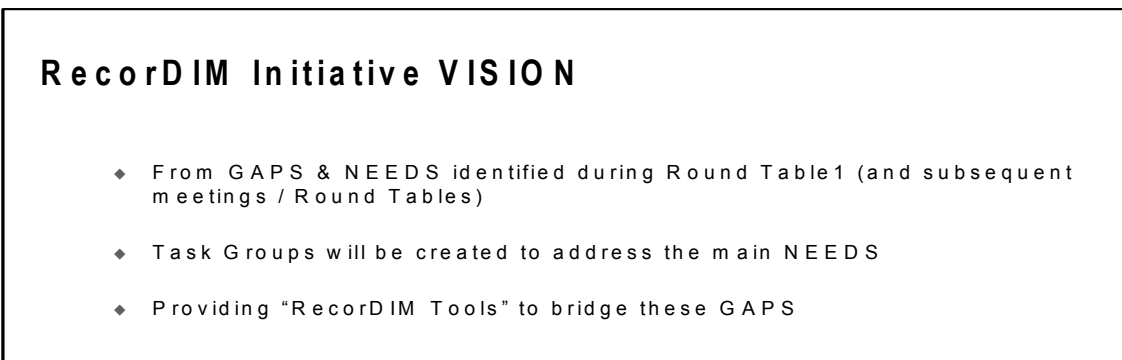
RecorDIM Initiative

Information Users	Consists of Bridging the Gaps	Information Providers
Conservation Experts *that specialize in*		**Heritage Recorders** *that specialize in*

Conservation Experts *that specialize in*

a. Research
b. Inventories
c. Initial studies
d. Conservation planning
e. Project management
f. Maintenance
g. Monitoring

Which generally use low-cost recording methods & tools

by working towards
sharing knowledge,
transferring skills
and
integrating
RecorDIM activities ...

... so as to raise the level of
conservation practices

Heritage Recorders *that specialize in*

a. Photography
b. Photogrammetry
c. Surveying, GPS
d. GIS
e. 3D Laser scanning
f. 3D Modeling
g. Geophysical Prospection
h. Etc.

Which generally use state-of-the-art recording tools and technologies

Figure 2 summarizes the long-term purpose and objectives of the 5-Year RecorDIM Initiative.

RecorDIM Initiative VISION

- From GAPS & NEEDS identified during Round Table1 (and subsequent meetings / Round Tables)

- Task Groups will be created to address the main NEEDS

- Providing "RecorDIM Tools" to bridge these GAPS

As indicated above, the intention is to create Task Groups, composed of a mix of expertise from partner organizations, to address GAPS / NEEDS identified conservation experts / information users. It is anticipated that additional needs will be identified during subsequent RecorDIM Initiative meetings (see the preliminary action plan hereafter). Deliverables and timetables should be defined by each Task Group to ensure that tangible results immerge from this 5 year Initiative.

RecorDIM Initiative Round Table-1

As promised in Potsdam, the GCI hosted the first RecorDIM Initiative Round Table at the Getty Centre in Los Angeles, which took place on March 4-5, 2002. A total of 23 conservation experts from 12 countries, representing most regions of the world, took part in this Round Table discussion. They spent two days working at **defining gaps and needs, and discussing strategies** to respond to the needs. The Roundtable-1 report is available at: Bridging the Gap Between Information Users and Information Providers .

At the end of this meeting, a **RecorDIM Steering Group** was created with Giora Sola, Peter Waldhäusl and Chris Gray respectively representing ICOMOS, CIPA and the GCI. Robin Letellier is the RecorDIM Initiative International Coordinator.

Preliminary Plan for 2002-3

A RecorDIM preliminary action plan is in development with the following proposed meetings / activities scheduled to take place during the next 18 months:

- discuss and work towards creating **RecorDIM Task Groups** during CIPA's Executive Committee meeting in Corfu (August 31, 2002);

- present the 5-Year RecorDIM Initiative to ICOMOS during the Pre-Assembly Meetings of the Bureau, Executive and Advisory Committees in Seville (November 28-29, 2002);

- organize a RecorDIM Initiative **Round Table-2** that should take place during the next ICOMOS General Assembly meeting in Madrid (December 3, 2002);

- work towards **promoting / increasing Information Users participation** to CIPA's XIXth International Symposium next year in Antalya, Turkey (September 30 - October 4, 2003 - http://www.cipa2003-antalya.com/welcome.htm).

Antalya 2003 CIPA Symposium

A specific invitation to the Conservation Community

To build a strong *ICOMOS Heritage Documentation Scientific Committee,* the RecorDIM Steering Group would like to see an **equal balanced of Information Users and Provides** participating to the next CIPA Symposium in Antalya. To support this intention, the CIPA Symposium organizer may consider organizing Oral Sessions entitled,

Recording, Documentation and Information Management (RecorDIM) Tools for:

1. Archaeological Sites
2. Architectural Heritage
3. Engineering Heritage
4. Cultural Landscapes
5. Historic Sites Management

Consequently, the **CIPA Symposium's 2nd announcement will** focus on the importance for **Information Users** to participate to the CIPA Symposium, to present their RecorDIM work and to exchange with other Information Users as well as with 'low-cost' and 'state-of-the-art' Information Providers.

The RecorDIM Steering Group would like to **invite conservation specialists** interested / involved in RecorDIM activities, to come to Antalya to help build a *Heritage Documentation Scientific Committee* that is being restructured to address Information Users needs. As a follow-up to the Symposium discussions and ideas presented, a **RecorDIM Round Table-3** will take place immediately after the Symposium to review and refine its 5-Year plan.

Appendix B

RecorDIM Roundtable-1 Report

Bridging the Gap
between
Information Users and Information Providers

Recording, Documentation and Information Management (RecorDIM) Initiative

GCI – ICOMOS – CIPA

Report of Roundtable 1
Los Angeles, California

March 4-5, 2002

Robin Letellier - RecorDIM Initiative - International Coordinator

Christopher Gray - RecorDIM Initiative - GCI Liaison Officer

Summary

Between 1995 and 1999, a series of outreach workshops held by the International Committee for Architectural Photogrammetry (CIPA) has identified critical gaps in the fields of heritage Recording, Documentation and Information Management between those who provide information for conservation and those who use it. In response, the International Council on Monuments and Sites (ICOMOS), the Getty Conservation Institute (GCI) and CIPA together created the RecorDIM (for Heritage Recording, Documentation and Information Management) Initiative partnership. The purpose of the initiative is to bring information users and providers together to identify the nature of the gaps between them, to develop strategies to close the gaps and to recommend a framework for action to be coordinated by the RecorDIM Initiative over the coming five years.

On March 4-5, 2002, the RecorDIM Initiative convened an international group of information users – conservation specialists of all trades, cultural resource managers, heritage program planners, etc. – to discuss their experiences with heritage recording, documentation and information management. A total of 23 experts from 12 countries, representing most regions of the world, participated in a two-day roundtable discussion to define user needs and suggest strategies to close the gaps between users and providers. In addition, the group developed a list of recommended next steps for RecorDIM over the next five years.

The group identified six general areas where actions were needed:

6. To improve perception and communication in recording, documentation and information management

7. To integrate recording, documentation and information management activities into the conservation process

8. To increase resources for documentation

9. To define, develop and promote documentation tools

10. To disseminate information

11. To make available specific RecorDIM Training / Learning Programs

For each of these areas, the group developed a list of strategies to close the gaps between information user and provider and improve conservation recording practice.

The group called on RecorDIM Initiative Partners to use the gaps and needs as a framework for future activities. Further, it called on each of the partners to adopt the strategies and coordinate efforts to implement them.
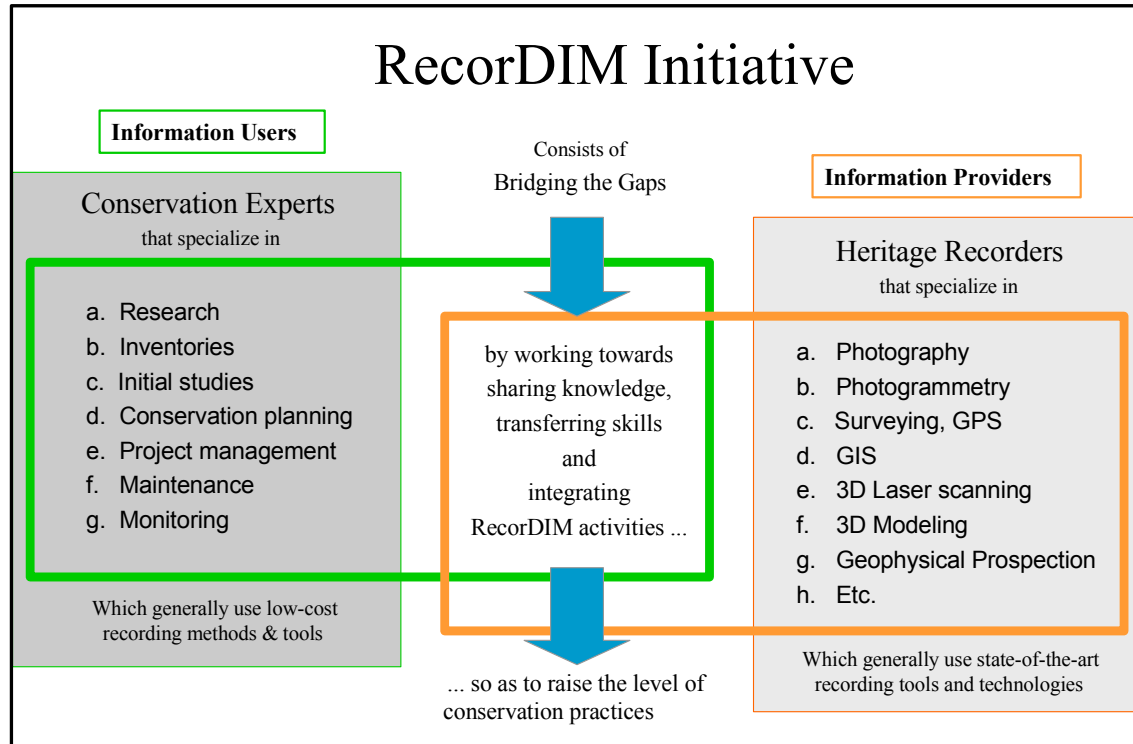
RecorDIM Initiative

Consists of
Bridging the Gaps

Information Providers

Conservation Experts
that specialize in

a. Research
b. Inventories
c. Initial studies
d. Conservation planning
e. Project management
f. Maintenance
g. Monitoring

Which generally use low-cost
recording methods & tools

by working towards
sharing knowledge,
transferring skills
and
integrating
RecorDIM activities ...

... so as to raise the level of
conservation practices

Heritage Recorders
that specialize in

a. Photography
b. Photogrammetry
c. Surveying, GPS
d. GIS
e. 3D Laser scanning
f. 3D Modeling
g. Geophysical Prospection
h. Etc.

Which generally use state-of-the-art
recording tools and technologies

Table of Contents

Introduction

In 1995, CIPA's Working Group 1 – Recording, Documentation and Information Management Principles and Practices (WG1) - was created to provide a forum for photogrammetrists and conservationists to meet and discuss the integration of heritage recording activities to conservation practices. To achieve this objective, WG1 held three Outreach Workshops (Austria 1996, Sweden 1997 and Brazil 1999). At these workshops, participants expressed the pressing need for heritage recording guidelines, technical manuals, training and information dissemination.

In 1998, the Getty Conservation Institute (GCI) approached CIPA to discuss partnership possibilities. The dialogue between the GCI and WG1 led to Bridging the Gap initiative to improve the communication between information users (conservation specialists, site managers, etc.) and information providers (heritage recorders, building surveyors , photographers, photogrammetrists, etc.).

At the Plenary Session of the September 2001 CIPA Symposium in Potsdam, papers by Robin Letellier, chair of CIPA's WG1, Francois LeBlanc, GCI's head of field, and Giora Solar, ICOMOS' delegate to CIPA, proposed a five-year Recording, Documentation and Information Management (RecorDIM) Initiative. (Gaetano Palumbo presented the paper by Giora Solar.)

The RecorDIM Initiative focuses primarily on creating a partnership between CIPA, ICOMOS and the GCI that will:

- organize roundtable discussions to define the gaps between information users and providers;

- publish guidelines for heritage recording, documentation and information management;

- develop "how-to" handbooks for recording;

- create a Web presence on these subjects;

- develop training opportunities and materials and

- develop further partnerships with appropriate and committed organizations.

This RecorDIM Initiative proposal was accepted unanimously at CIPA's executive meeting following the Potsdam Symposium. CIPA voted to support the project and become a partner in the five-year initiative.

Similarly, when Giora Solar presented the RecorDIM Initiative to the ICOMOS Executive Committee in Dubrovnik in October 2001, the Executive Committee expressed its support in principle for the RecorDIM Initiative subject to a plan of action.

To support the RecorDIM initiative, CIPA, ICOMOS and the GCI formed a partnership with the goal of providing support, guidance, training and the dissemination of information that will raise the level of heritage conservation practice worldwide. It is important to note that the RecorDIM Initiative partners welcome organizations and individuals interested in joining the effort to bridge the gaps and address needs identified in this report. (Additional information on the RecorDIM Initiative and its partners can be found in appendices B-D.)

The Venue and Participants

The Venue

On March 4-5, 2002, 23 expert participants met at the Getty Conservation Institute in Los Angeles, California, as the first stage of the RecorDIM Initiative.

The Participants

The majority of participants were drawn from the information user community. They represent a broad diversity of disciplines and cultures, reflecting the variety of conservation activities and diversity of heritage recording experience in different regions of the world.

Participants left to right

Back Row*: Albini Soucy, Mitchell Bishop, Kalandar Kamalkhan, Carolina Castellanos, Paul Box, Paul Bryan, Giora Solar, Francoise Descamps, Shin Maekawa, Mary Hardy, Chris Gray;*

Front Row: Rand Eppich, Robin Letellier, Jack Vandenberg, Marieke Kipers, Wierner Schmidt, Peter Waldhausl, Blaine Cliver, Francois LeBlanc, Jovo Grobovsek, Lori Wong

(Not in the photo*: Jeanne Marie Teutonico and Gaetano Palumbo*)

Photo by Debbie Valenta

The Objectives

The objectives of the meeting were threefold:

1. to define the gaps that exist between the information users (conservation specialists and managers) and the information providers (photogrammetrists and heritage recorders)

2. to identify a range of specific solutions to close these gaps

3. to create task groups, composed of representatives from the three RecorDIM partners, that will initiate the process and be responsible for its development.

The meeting began with opening remarks from Tim Whalen, Director of GCI, and a vision statement from Robin Letellier. Following these remarks, the agenda was divided into four distinct steps. For each step, the group was divided into small working groups to address specific questions or concerns. Following the working session in each step, the small groups reported back to the general session, to build common understanding and consensus and for clarification when needed.

The group approached its task in four steps:

1. Analyzing the situation – the general situation of heritage recording and documentation, particularly relationships between information users and providers;

2. Identifying the gaps – the gaps in working relations between information users and providers;

3. Translating gaps to needs – a range of solutions that would bridge gaps between users and providers

4. Formulating strategies – specific strategies that could bridge the gaps. (A full agenda is included in Appendix E.)

Interim RecorDIM Definitions

To facilitate understanding / dialog during RecorDIM meetings, the following definitions were provided. They are taken from the Heritage Recording, Documentation and Information Management Guidelines for World Heritage Sites manuscript that was developed in the mid-nineties with the participation from ICCROM, ICOMOS and UNESCO.

Heritage recording - the capture of information relevant to understanding the physical configuration, evolution and condition of heritage sites and objects, at known points in time, and the basis of decisions made to alter or care for such sites and objects.

Documentation - information units acquired over time through heritage recording and other research means, which constitute the knowledge base for particular sites and objects.

Information management - the process of acquiring, storing and sharing site documentation to ensure its accessibility, security and reliability.

Conservation - concerned with the transmission of cultural heritage, with its significant messages intact and accessible to the greatest degree possible.

Conservation process - the analytical decision-making process of ensuring that conservation intervention at all levels will respect heritage values of sites while maintaining functional effectiveness within applicable budget and other constraints.

Conservationists / conservation specialists - those who, whatever their profession, trade or discipline of origin (i.e., art historians, architects, archaeologists, planners, etc.), engage in the practice of conservation and are committed to the application of the highest principles and standards of the field in their work. They are also referred to as information users.

Heritage recorders / photogrammetrists - all levels of experts in the design and execution of effective heritage recording activity within the conservation process. They are also referred to as information providers.

RecorDIM - acronym referring to the activities of recording, documentation and information management

Summary of gaps and needs

The following list summarizes the main gaps and needs identified during the roundtable. (The complete, unedited list of gaps and needs can be found in Appendices F and G.)

1. **To improve perception and communication in heritage recording, documentation, and information management**

    - **By information dissemination**
      Very little information specific to the purpose and benefits of heritage recording, documentation and information management is currently being distributed to and shared between information users and providers. Partners need to understand each others' role and responsibilities better. (Users believe providers are rooted in the future and providers believe that users are rooted in the past.) More needs to be done to educate users of available tools and providers of the goals of conservation management.

    - **By creating bibliographies, thesauruses, definitions**
      There is an urgent need for the compilation of a complete bibliography of recent publications on heritage recording, documentation and information management tools, technologies and applications. (Information is often published as conference or symposium proceedings, but not easily accessible.)

    - **By creating focused newsletters**
      Currently, there is no international periodical in the field that allows experts in recording, documentation and information management to share their knowledge and experience. This communication tool would be an effective way to bridge the gap between information users and providers

    - **By establishing integrated professional networks**
      Although specialized professional networks already exist and provide forums for exchange on specialized topics, they need to be strengthened. Multidisciplinary exchanges are growing in many disciplines, bringing together varied expertise for complex projects. Heritage conservation is a complex activity that requires exchange of ideas and information and the integration of diverse skills and knowledge.

    - **By encouraging joint symposia, seminars and tradeshows**
      A growing number of specialized groups already meet to exchange on specific technical subjects. CIPA is an example of a very specialized international scientific committee that is working towards inviting experts outside the discipline to their meetings. There is a need for other ICOMOS scientific committees (and other organizations) to join the RecoDIM Initiative and be part of symposia and seminars to build bridges between heritage recorders and conservation specialists.

    - **By involving the private sector and outside organizations**
      It is critical to involve the private sector in RecorDIM activities. The private sector needs to be exposed to governmental conservation practices since government often is responsible for managing projects. Education and dissemination of knowledge should reach beyond the traditional conservation community. It is particularly important to communicate the benefits of documentation to owners, interpreters and marketers, among others, by showcasing model projects and best practices.

2. **To integrate recording, documentation and information management activities into the conservation process**

   - **By developing and implementing recording and documentation processes**
     One of the important gaps named during the roundtable was the fact that few organizations have developed a recording and documentation process that is integrated into their conservation activities. Furthermore, few information users work within a well-defined conservation process. The group expressed an urgent need for promoting the integration of these activities to increase effectiveness in conservation practices.

   - **By including recording, documentation and information management practices in conservation management guidelines**
     Conservation management guidelines exist, but few refer to the importance of recording and documentation as activities that should be central to conservation practices. There is a need for guidelines that provide heritage conservation managers and practitioners with proper guidance and direction. Such guidelines must be developed jointly by users and providers of information.

3. **To increase resources for documentation**

   - **By promoting its benefits**
     Decision makers are often unaware of the purpose and benefits of recording, documentation and information management activities. It was suggested that the benefits of these activities can be demonstrated by case studies and best practices. Another major benefit is that RecorDIM activities also provide 'posterity records' for future generations. As investments in recording and documentation improve quality and cost effectiveness, bigger budgets should be allocated to recording activities.

   - **By writing related policies**
     To ensure sustainable resources for documentation activities, policies must clearly state that these heritage recording, documentation and information management are integral parts of the conservation process. Such policies are essential to sustaining the discipline in the long term.

     Archiving with concurrent cost implications is another area where policy guidance is required to make better informed decisions.

4. **To define, develop and promote documentation tools**

   - **By writing:**

     1. *Standards*

2. *Guidelines*

3. *Handbooks*

4. *Best practices*

There must be well-defined standards and guidelines to ensure a good level of understanding and knowledge of documentation and recording principles and practices. Handbooks generally complement the standards and guidelines and case studies help link theory to reality. Few publications on these subjects exist.

- **By encouraging the development of software**
  Some general commercial software is used for documentation activities but in many cases without the level of effectiveness and accuracy that can be achieved with specialized software. Better software will facilitate and expedite conservation work by assisting in producing better records, research, analysis, design, maintenance and monitoring. Information users can encourage the production of better, more specialized software by promoting its benefits, sharing customer feedback with producers, and investing more in technology (e.g., low-cost rectified-photography and 3D modeling software).

- **By encouraging the development of hardware**
  Hardware can be cost-effective if well designed for specific applications. Through outreach to the private sector, universities and research centers, heritage recorders can encourage good dialogue and knowledge transfer. The RecorDIM Initiative partners represent users and providers who are interested in adapting existing hardware and software to the needs of conservation practices (e.g., low-cost and user-friendly photogrammetric systems, portable 3D laser scanners).

- **Other tools required**
  - Tools to enable cost-benefit analysis
  - Case studies
  - Economic models
  - Tools for estimating, procuring and tendering

5- To make available training and learning programs in recording and documentation

- **By offering courses, seminars, workshops, etc. through:**

  - CIPA

  - ICOMOS

  - ICCROM

  - National conservation organizations

  - Universities

  - Other groups and organizations

  Although a growing number information users are requesting training in heritage recording, documentation and information management, there are few courses that offer such training. This keeps many users from benefiting from the many available tools.

- **By establishing certification and accreditation**
  Proper heritage recording and documentation certification or accreditation does not currently exist. Some type of accreditation would certainly create greater interest in this type of training and would give more credibility to the activities of heritage recording, documentation and information management. This could occur at both graduate and mid-career level.

- **By educating providers**
  Consideration should be given to extending the education of heritage information providers beyond the technical requirements to provide a better understanding of the non-quantitative value of cultural heritage – the sense of place, people, landscapes, quality.

Conclusions

The roundtable succeeded in producing a list of significant gaps and needs that provides a clear framework for the work of the RecorDIM Initiative over the next five years. In addition, the group identified many strategies to promote heritage recording activities and to address the gaps and needs.

Importantly, the spirit and participation of attendees was high during the entire meeting, and their feedback was positive in all respects. This two-day exchange was a meeting of minds between three international groups, the partners that are now engaged in supporting the RecorDIM Initiative.

Participants were asked to commit themselves to work at resolving some of the gaps and needs. François LeBlanc for the GCI indicated an interest in guidelines, handbooks and training. Representatives of the U.S. National Park Service, English Heritage and Parks Canada, three major heritage conservation organizations, had the opportunity to consider common issues. The three began discussing the possibilities of pooling resources to address shared needs in their organizations and conducting outreach to the international community. On an individual level, many expressed a high level of commitment to the success of the initiative.

Next steps

At the conclusion of the roundtable, participants made a number of recommendations for carrying forward their findings:

The group recommends that the above list of gaps and needs be used by the RecorDIM Initiative Partners (ICOMOS, CIPA, GCI) as a framework to promote, define and coordinate future activities and to encourage other organizations to participate to this project. (This list should be considered preliminary; it will be presented, discussed and expanded during the CIPA RecorDIM Task Group meeting in Corfu in August 2002 and at the ICOMOS RecorDIM meeting in Madrid in December 2002.)

The participants also recommend that the RecorDIM Partners be responsible for coordinating at least one task each. This would give the Initiative a good start by ensuring institutional support and a certain level of sustainability to the project. For example, the need to develop more training programs could be shared by CIPA's Working/Task Groups, ICOMOS' Scientific Committees and National Committees as well as ICCROM's Seminars. National conservation organizations, such as English Heritage, Parks Canada and the U.S. National Park Service, could also participate as could universities such as Columbia University (New York), University of Pennsylvania (Philadelphia) and the University of Leuven (The Netherlands).

At this date, it is likely that ICCROM and UNESCO will join the current RecorDIM Partners to help deliver this five-year Initiative. In this situation, it is hoped that each of the five main areas of needs or gaps could become the responsibility of one partner organization, for instance, The GCI could oversee efforts in the area of Perception / Communication. ICOMOS could be responsible for activites in Conservation Process. UNESCO could oversee the Resources area; CIPA, Tools and ICCROM, Training and Education. This shared responsibility could become the basis for the RecorDIM Initiative five-year plan with a RecorDIM Steering Group (composed of one representative from each partner organization)that would coordinate the overall RecorDIM Initiative activities.

Appendix C

RecorDIM Task Group Operational Framework

(note that this Operational Framework is being revised and will possibly be provided as 'Attachment 3' to this report. This attachment will become a guideline for those creating RecorDIM Task Groups. It will also be used to coordinate the 5 year RecorDIM Initiative activities)

Appendix D   *(Task Group **Model** – preliminary draft for discussion –*

revised Feb. 2003)

RecorDIM Information Warehouse - Task Group Proposal

Date: January 10, 2003

Task Group Name / Title: RecorDIM Information Warehouse

- Chair-persons: Natalie Bull (to be confirmed) / Robin Letellier
    Organization: HCP-PWGSC

- Information User representative: (?)
    Organization: (possibly Parks Canada)

- Information Provider representative: (?)
    Organization: (possibly EH? To be discussed with SL)

Project Outline

RecorDIM Initiative participants are invited to share existing information / publications that are related to RecorDIM activities. This information will be posted on the **RecorDIM** website (at: http://recordim.icomos.org/warehouse.html) under one of the **topics** listed hereafter.

These topics are based on the RecorDIM Initiative Roundtable-1 list of gaps and needs. It should be noted that this list is preliminary and will be refined during 2003, after receiving suggestions for improvements.

The **Information Warehouse** topics are:

RecorDIM :

- Policies

- Guidelines

- Standards

- Inventories

- Processes

- Handbooks

- Tools / Handbooks

- Training

- Best Practices

(… list to be completed / refined during 2003)

Purpose and Objectives

The prime purpose of this **Information Warehouse** is to provide a knowledge of existing RecorDIM publications / documents to those interested in creating RecorDIM Task Groups.

Also, some of the **specific objectives** are:

- to provide conservation specialists worldwide with a **'one stop' web site** for information on RecorDIM activities worldwide;

- To compile under each RecorDIM topic, as many reference documents as possible for Conservation Organizations that wish to develop RecorDIM practices in their country;

- To provide information on new RecorDIM practices, tools and technologies, as soon as they are made available.

Instructions

When submitting a document to be posted on the '**Information Warehouse' web page**, it should be ensured that the document is relevant to one of the suggested topics, and that copyright to use it on the web site has been obtained. A copy of the copyright agreement must be given to the Warehouse Coordinator.

Proposed document(s) should be sent in PDF format if possible (other standard / most used formats will be accepted) to Letellier.R@Sympatico.ca . Note that the "Participation Questionnaire" in appendix E must accompany your proposals for posting a document.

Deliverables:

An open-ended collection of focused documentation will be made available on the ICOMOS server to conservation practitioners worldwide.

An interactive collection of data that will grow with the interest / motivation / generosity of those sharing / using related information.

Other Task Group Team Members (i.e. that will be actively involved in the project)

- (to be added to the list as the Task Group experiences the need for additional resources)
-
-
-

Project Resources (that have been secured / approved):

- **Person-days (commitments)**

    It is anticipated that this task will not be very demanding in that it will consist of:

- verifying the topic and pertinence of documents sent to be posted;
- verifying the Participation Questionnaire data and ensuring that there is a copyright / distribution agreement;
- posting the document on the website (without modifying / editing the text / format of data sent)

    Assuming we receive 2 to 3 documents per week, this tasks could require approximately 1 hour/week per team member.

- **Budget (commitment)**

    No budget is required at the moment. However, should the number and size of files become very large, additional hard disk storage space may be required? This cost has been recognized by one of the RecorDIM Partners and would be covered should the need be confirmed.

Milestones:

- Starting date: March 2003

- Mid-project review date (by RecorDIM Liaison Officers): March 2004

- Completion date: on-going activity

Confirmation of resource for this Task Group

_____ date: _____
Task Group Chair's Manager
_____ date: _____
Information Provider's Manager
_____ date: _____
Information User's Manager

Appendix E

RecorDIM Participation Questionnaire

To participate to the RecorDIM Initiative, the following 'Participation Questionnaire' must be filled out and sent to: Letellier.R@Sympatico.ca

Name: ………………………………………………………………………..……….

Responsibility: …………………………………………………………………..……...

ICOMOS National Committee of …………………………………..…….. (country)
or
ICOMOS Scientific Committee: ………………………………………..………………
Or
Other Organization: …………………………………………………………………..

<u>I am / we are interested in the RecorDIM Initiative:</u>

A) We would like to be on the **Information Warehouse** distribution list.
The email address is: ……………………………………………….

We would like to participate to the **Information Warehouse** web presence by proposing to post the following RecorDIM related publication(s) / document(s) which has (have) been approved by our Committee (please see Information Warehouse instructions at: http://recordim.icomos.org/ ,and send document for review by Task Group to Letellier.R@Sympatico.ca , in **PDF format if possible**):

………………………………………………………………………………………………
This publication should be posted under the following Information Warehouse sub-heading(s) (see http://recordim.icomos.org/warehouse.html):

- Best Practices ( )

- Guidelines ( )

- Inventories ( )

- Policies ( )

- Processes ( )

- Standards ( )

- Tools / Handbooks ( )

- Training ( )

- Or we suggest the following sub-heading ( )

B) I / we would like to **participate <u>actively</u> to the RecorDIM Initiative**

Name of participant(s): ..……………………………………………………
Email: …………………………….…………………………………………………
Area of interest: ………………………………………………………………………

C) We would like to **define / propose a RecorDIM Task Group** that would address the following Gap / Need: …………………………………………………………………………...
………………………………………………………………………………………………
Please send me a "**Task Group Proposal Form"** and procedures (which are available from Robin Letellier, RecorDIM Initiative Coordinator - Letellier.R@Sympatico.ca)

Appendix F

RecorDIM Task Group Proposal Form

Task Group Name / Title:

- Chair-persons:
      Organization:

- Information User representative:
      Organization:

- Information Provider representative:
      Organization:

Project Outline

The **Information Warehouse** topics are:

RecorDIM :

- Policies

- Guidelines

- Standards

- Inventories

- Processes

- Handbooks

- Tools / Handbooks

- Training

- Best Practices

(… list to be completed / refined during 2003)

Purpose and Objectives

Deliverables:

Other Task Group Team Members (i.e. that will be actively involved in the project)

Project Resources (that have been secured / approved):

- **Person-days (commitments)**

- **Budget (commitment)**

Milestones:

- Starting date:

- Mid-project review date (by RecorDIM Liaison Officers):

- Completion date:

Confirmation of resource for this Task Group

_____ date: _____
Task Group Chair's Manager
_____ date: _____
Information Provider's Manager
_____ date: _____
Information User's Manager

Appendix G

RecorDIM Round Table-2 Agenda

Documentation - Section 1
(3 December 2002)

Agenda

10:00 – 14:00   - Presentation of papers as per ICOMOS Symposium Program

14:00 – 16:00   - Lunch

RecorDIM Initiative - Roundtable-2

16:00 – 19:00

> **Robin Letellier**   RecorDIM Initiative International Coordinator
> & Roundtable-2 Moderator
> **Giora Solar**,   Rapporteur
>
> 16:00 - 16:10   - **Overview** of RecorDIM Initiative (Robin Letellier)
>
> 16:10 – 16: 50   - Four short (10 min.) Keynote presentations on **ICOMOS / Information Users' RecorDIM Gaps and Needs**
>
>> (Referring to Roundtable-1 Gaps and Needs, four of the Documentation Section speakers will share their experiences pertaining to RecorDIM problems / frustrations / needs encountered during their conservation work / activities)
>
> 16:50 – 17:30   - Debate on **RecorDIM problems encountered,** and discussion on needs and solutions?
>
>> (i.e. to discuss how these problems and needs relate to the Gaps and Needs from Roundtable-1 report? What is missing? And, suggest complementary **Gaps and Needs** to Roundtable-1's list, and how best could they be addressed?)
>
> **(17:30 – 18:00   - Coffee Brake)**
>
> 18:00 - 18:10   - **Antalya 2003 CIPA XIXth Symposium** Announcement and Program (Sept. 30 to Oct. 4, 2003)
>
>> (Nuran Zeren Gulersoy, Symposium Co-Director)
>
> 18:10 – 18:45   - Debate on **how CIPA Symposium activities could be structured** so that **ICOMOS' Information Users** can participate more actively?
>
>> (i.e. what is needed to better satisfy the requirements of ICOMOS conservation experts, and to attract ICOMOS RecorDIM specialists to attend future CIPA Symposia?)
>
> 18:45 – 19:00   - **RecorDIM Initiative "Roundtable-3" Objectives** (Antalya – Oct. 5, 2003)

(following the Antalya 2003 CIPA XIXth Symposium, a
RecorDIM Roundtable-3 will take place to finalize and
implement the **5-Year RecorDIM Plan** (i.e. 2002-2007)

Appendix H

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Preliminary Agenda
RecorDIM Partners Meeting

(Vienna - March 23-25, 2003)

</div>

- **Review of <u>RecorDIM Task Group Proposals</u> (that are in the making)**

  o The GCI
  o ICOMOS
  o CIPA
  o HCP for Parks Canada
  o EH
  o WMF
  o Other

- **Review of RecorDIM Operations**

  o Task Group Operational Framework
  o Task Group Proposal Form

- **Review of RecorDIM Web Presence** (http://recordim.icomos.org/)

  o Overview
  o Information Warehouse
  o Other

- **RecorDIM Strategy**

  o Antalya's CIPA Symposium
  o RecorDIM Plenary Session (Oct. 1, 2003 – Antalya -
     see http://www.cipa2003-antalya.org/programme/programme.htm)
  o RecorDIM Roundtable-3 (Oct. 5 & 6, 2003 - Turkey)
  o RecorDIM preliminary plans for 2004-7

- **Other?**

Appendix I

RecorDIM and English Heritage

(Note: The following text provides a preliminary understanding of English Heritage Metric Survey Team's possible participation to the RecorDIM initiative. It must be reviewed / confirmed by Paul Bryan before being included to this report)

(the 3 pages of this appendix have been removed awaiting that EH edit them – Feb. 27, 2003)

Appendix J

CIPA RecorDIM Initiative Task Group Meetings *(Invitation Memo)*

August 14, 2002

To: **- CIPA Executive**
and
- RecorDIM Initiative Liaison Officers

- Giora Solar - ICOMOS
- Chris Gray - GCI
- Peter Waldheausl - CIPA
- Orhan Altan - Antalya 2002 CIPA Symposium Director
- Gaetano Palumbo - WMF (World Monuments Fund - being confirmed)

From: **RecorDIM Initiative International Coordinator**

Robin Letellier

Subject: RecorDIM Initiative Task Group Meetings
(Corfu – Aug. 31 to Sept. 3, 2002)

Dear friends and colleagues,

I hope you are all enjoying the summer as I am, and I assume you are slowly getting ready for Corfu.

This email is to follow-up on Peter's June 13 email regarding the above subject. I trust you all read Peter's email and both attachments, which were meant to provide you with the context for the Corfu RecorDIM Initiative Task Group discussion.

As outlined in Peter's email attachment entitled **"RecorDIM Preliminary Plan for 2002-3"**, we have organized the following meetings with **RecorDIM Partners.** These meetings are to initiate discussion on how best we can work together to bridge some of the RecorDIM gaps and needs over the next 5 years:

- August 31, 2002 - Corfu

    o **Discuss / Create CIPA Task Groups** during the CIPA Executive Committee meeting

- November 28-29, 2002 - Seville

    o **Present the 5-Year RecorDIM Initiative** to the ICOMOS Bureau, Executive and Advisory Committees, so as to seek further ICOMOS support and participation;

- December 3, 2002 - Madrid

    o **Organize a RecorDIM Initiative Round Table-2** to be held at the ICOMOS General Assembly - seeking support and strategic participation to the initiative;

- Spring 2003

  - o **Develop a strategy** ensuring increased **Information Users participation** to CIPA's XIXth International Symposium in Antalya, Turkey (September 30 - October 4, 2003 - http://www.cipa2003-antalya.com/welcome.htm).

Corfu (Aug. 31)

I thought that now would be a good time to provide you with additional information pertaining to the RecorDIM discussions that will take place on August 31, and during the week as needed.

As indicated above, one of the main objectives of the Corfu RecorDIM meeting is to **create Task Groups** to address some of the gaps / needs listed in the RecorDIM Roundtable-1 report. In preparation for this discussion, I have attached the first 12 pages of this report, which contain the essence of Roundtable-1 outputs. The entire report will soon be posted on the GCI Website.

The RecorDIM partners (ICOMOS-CIPA-GCI) are planning to use the "Summary of Gaps and Needs" found on pages 9 to 11, as an **Initial Framework** to define and coordinate the RecorDIM activities. It will also be used to encourage / invite other organizations to participate to this Initiative. This list of gaps and needs should be considered as preliminary as it will be refined after the Corfu, Seville and Madrid RecorDIM meetings.

As indicated in the report conclusions, the GCI has an interest in, and sees a need for developing guidelines, handbooks and training. Consequently, we are hoping that during the Corfu discussions, we will be able to define new task groups to address some of these specific needs, and others too! We are also hoping that task groups will be composed of representatives from each of the partner organizations.

Consequently, I have prepared the following generic questions for the Aug. 31 RecorDIM meeting:

- **How** will **CIPA participate** to the RecorDIM Initiative?

- **What Task Groups** should be created to address some of the RecorDIM GAPs / NEEDs identified in the RecorDIM Roundtable-1 Report?

- **How** do we **INTEGRATE Information Users into** 'new Task Groups' to effectively address the RecorDIM gaps / needs

- **What will be the deliverables for** the newly created Task Groups?

It is my understanding that the **RecorDIM Task Group Meeting** will take-up the better part of Saturday (Aug. 31), and that follow-up discussions should take place during the remaining of the CIPA meetings if needed.

I am looking forward to seeing you all again in Corfu.

Robin Letellier

RecorDIM Initiative
International Coordinator

Appendix K

ICOMOS THIRTEENTH GENERAL ASSEMBLY

&

INTERNATIONAL SCIENTIFIC SYMPOSIUM

(Madrid, December 2002)

SCIENTIFIC SYMPOSIUM SECTION 1. DOCUMENTATION

REPORT TO PLENARY SESSION

Professor Richard Mackay (Australia)

The Documentation Scientific Symposium was co-ordinated and chaired by Mr E Blaine Cliver (United States of America). I thank him for his outstanding and effective effort on behalf of the General Assembly and the presenters and participants in the Symposium.

This Symposium provided participants with a global array of cultural places, philosophy and technology — in short an innovative and thought-provoking series of approaches to the documentation of our rich cultural heritage. This Symposium provided a prelude to the Roundtable 2 of the RecorDIM project, a joint initiative by the Getty Conservation Institute, CIPA and ICOMOS, coordinated by Robin Letellier. With this in mind, the Symposium presentations and ensuing discussion focused on gaps in existing recording techniques and methodology.

Gaps in Knowledge and Existing Documentation

The majority of papers in the Symposium provided thematic case studies, which highlighted gaps in existing knowledge or documentation.

Lidia Klupsz (Poland) presented an analysis of the fortress landscape using examples from Poland. In the paper itself and following discussion, the need to address former military places was recognised, resulting in a recommendation for a General Assembly resolution.
Maria Claudia Romero (Colombia) and Alfredo Conti (Argentina), both focused on modern heritage drawing attention to the paradox between the greater quantum of important twentieth century heritage monuments and sites, but the relative absence of such sites from the World Heritage List and the heritage lists of individual states and countries.

Catherine Kremezi (Greece) focused on a value-based approach to cultural routes, emphasising the potential differences between the approach of traditional scholars and local traditions.
Wolfram Lubbeke (Germany) outlined a case study from Bavaria indicating that in some parts of the world standards are well developed, but that what is critical for effective listing is appropriate criteria.

Antonio Frattari (Italy) illustrated examples of alpine architecture and contemporary adaptation noting that documentation is fundamental to good decision making.

Gaps in Methodology

Susan Tate (United States of America) presented a case study from the Florida University campus noting a problem with divergent agencies and their respective roles. This paper highlighted the need for effective links between heritage documentation and heritage management.

Salim Elwazani (United States of America) considered contextual effects on measured surveys, providing an interesting example of evaluating the documentation process itself. This paper illustrated methods for 'measuring the measuring'.

Technology to Fill the Gaps

Richard Mackay (Australia) showcased an application of Geographical Information Systems and linked databases to urban archaeology. This paper emphasised how technology can assist in establishing operational links between documentation, assessment and statutory management.

Fabio Remondino (Switzerland) kept participants spellbound with a multimedia display of the three-dimensional reconstruction of the Great Buddha of Bamiyan, Afghanistan. This was a particularly useful paper, leading into the recording discussions as it highlighted the role of technology and a question, discussed much in the latter part of the session, as to whether technology is leading conservation or conservation is leading technology.

Other Gaps

Miguel Brito Correia (Portugal) outlined a brief history of a predecessor of ICOMOS from the 1930s — the 'International Committee on Historic Monuments' established under the auspices of the League of Nations in 1933.

Sadly, although a diverse array of technologies and places were covered by the session, we did not have the opportunity to enjoy a paper, or any examples, from Africa that related to this 'gap'. The papers and discussions focussed heavily on documentation of fabric, rather than intangible heritage. It must be hoped that these absences will be remedied at the proposed forthcoming General Assembly in Zimbabwe.

Recommendations

The Documentation Scientific Symposium makes the following recommendations to the General Assembly:

1. ICOMOS should facilitate a workshop on recording of cultural landscapes; and

2. ICOMOS should consider the establishment of a Scientific Committee concerned with fortifications and former military sites.

The session was informative and provocative. The papers highlighted that much has been achieved in approaches to documentation, but revealed that there is still much to learn.

Professor Richard Mackay

December 2002

Appendix L

RecorDIM Initiative presentation to ICOMOS Advisory Committee

Partial list of participants - Seville (Nov. 29, 2002)

-	Gabriel Kertesz	ICOMOS	Israel
-	Benedict Goes	ICOMOS	Netherlands
-	Blaine Cliver	ICOMOS	USA
-	Viera Dvorakoua	ICOMOS	Slovakia
-	Jovo Grobovsek	ICOMOS	Slovenia / SI
-	Jaan Tamm	ICOMOS	Estonia
-	Sagale Buadromo	ICOMOS	Fiji
-	Robert Grenier	ICOMOS	ISC-ICUCH
-	Cor Dijkgraaf	ICOMOS (shared Colonial Heritage)	Netherlands
-	Sarah Jane Brazil	ICOMOS	Australia
-	Philippe La Hausse de Lalouviere	ICOMOS	Mauritius
-	Robyn Riddett	ICOMOS	ISC-ICORP
-	Jose Marta Garcia de Miguel	ICOMOS	Spain
-	Maria Rosa Suarez-Inclan	ICOMOS	ISC-CIIC?
-	Hae Un Rii	ICOMOS	Korea (Rep. of)
-	Tom Hassall	ICOMOS	UK
-	Graham Brooks	ICOMOS	Australia
-	STVLC	ICOMOS	Czech Republic
-	Giora Solar	ICOMOS RecorDIM Liaison Officer	Israel
-	François LeBlanc	GCI RecorDIM Liaison Officer	USA
-	Peter Waldhäusl	CIPA RecorDIM Liaison Officer	Austria
-	Robin Letellier	RecorDIM International Coordinator	Canada

Appendix M

Suggested ICOMOS-ISC Workshop – Zimbabwe 2003

January 10, 2003

To: Dinu Bumbaru
        Secretary General
        ICOMOS

From: Robin Letellier
        Vice-President
        CIPA - Heritage Documentation Committee

Subject:

ICOMOS-ISC Chairs Meeting
Chaired by Dinu Bumbaru
Seville - November 28, 2002

Dear Dinu,

As you recently requested, please find hereafter a summary of the suggestion / proposal I made in Seville last November. Please share it with the ICOMOS Executive when you meet with them in Paris at the end of January 2003.

I would be happy to provide additional input to help make this well needed workshop a success.

Best regards,

Robin

_____

Suggested ICOMOS-ISC Workshop

During the above-mentioned meeting in Seville, the ISC Chairs were requested to report on their Committee activities.

Peter Waldhausl from CIPA, and others underlined the fact that some committees are doing very good work, others are fairly well organized, and some do little. It was also mentioned that the ISC Committees generally work in isolation and could be integrated more (see the many emails / proposals written by Peter W.). A good number of Chairs made allusion to the fact that there is a need for improving the ICOMOS structure pertaining to the ISC and their activities.

Being one of the last participants to comment on the Committees activities, I suggested, based on my experiences, that one of the better ways to get to the bottom of this problem, which has been brought to the ICOMOS table many times in the past, would be to have a workshop on the matter. Therefore I suggested that a 2 to 3 day workshop of ICS Chairs be organized in the near future to address the following questions (which questions would need to be refined by the organizers):

- What is working well within the ISC activities?
- What is not working?
- What are the **main gaps and needs** that must be resolved?
- Should we restructure the ISCs to better meet these needs?
- If so, how could this structure work best for all?

Obviously, for such a demanding workshop to provide clear outputs and recommendations, it would have to be developed, organized and moderated by an **outside professional moderator / facilitator** to ensure objectivity and high level results.

Following the positive feedback from participants on this suggestion, it was proposed that the best time for such a ISC workshop would be the week preceding the up-coming ICOMOS meeting in Zimbabwe / South Africa (fall 2003). This would have the advantages / benefits that:

- there would be ample time to prepare for this workshop;
- it would be within an ICOMOS event, therefore ISC Chairs should have better access to travel funds;
- the outputs / recommendations would be defined prior to the GA;
- the results would be presented in plenary during the GA
- executive decisions could be made at the end of the GA

I trust this workshop would bring the ISC to another level of exchange / interaction that would benefit conservation activities worldwide. Perhaps it could also be an opportunity for ICOMOS to strengthen ISC links with the RecorDIM Initiative (see site under development at: http://recordim.icomos.org/index.html) that was presented to the Advisory Committee in Seville.

Robin Letellier

Appendix N

RecorDIM PowerPoint presented in Seville and Madrid

(note that this PowerPoint presentation is provided as attachment-2 as it could not be inserted here due to the file format)

Appendix O
 (note that this appendix was removed)

Appendix P

List of ICOMOS Scientific Committees & Chair Person(s)

CSI Vitrail : Stefan Trümpler <centre.recherche.vitrail@bluewin.ch>,

CSI Tourisme Culturel : Graham Brooks" <austicomos@deakin.edu.au>,

CSI Questions Légales : Werner von Trützschler <w.true@web.de>,

CSI Préparation aux Risques : Robyn Riddett <rgrd@bigpond.com>,

CSI Pierre : Isabelle Pallot-Frossard" <isabelle.pallot-frossard@culture.fr>,

CSI Photogrammétrie / CIPA: Robin Letellier <Letellier.R@sympatico.ca>,

CSI Photogrammétrie / CIPA: Peter Waldhaeusl <president@cipa.icomos.org>,

CSI Peintures murales : Nimal de Silva" <nimaldes@vinet.lk>,

CSI Patrimoine Subaquatique : Robert Grenier" <robert_grenier@pch.gc.ca>,

CSI Patrimoine Polaire Susan Barr" <susan.barr@ra.no>,

CSI Pat. Archéologique ": Brian Egloff <egloff@scides.canberra.edu.au>,

CSI Jardins Historiques : Robert de Jong" <R.dejong@monumentenzorg.nl>,

CSI Jardins Historiques : Marie-Jeanne Geerts" <maria.geerts@ftw.kuleuven.ac.be>,

CSI Itinéraires Culturels : Maria Rosa Suarez Inclan Duc
    assi <cscae@arquinex.es>,

CSI ISCARSAH : Koen van Balen" <koenraad.vanBalen@bwk.kuleuven.ac.be>,

CSI ISCARSAH : Giorgio Croci" <mail@giorgiocroci.com>,

CSI Formation : Jukka Jokilehto" <mesoheil@tin.it>,

CSI Economie de la conservation : Christian Ost" <ichec.economie@euronet.be>,

CSI Bois : David Michemore" <build-conserve@geo2.poptel.org.uk>,

CSI Bois : Andrew Powter" <andrew_powter@pch.gc.ca>,

CSI Art Rupestre : Ulf Bertilsson" <ulf.bertilsson@raa.se>,

CSI Architecture Vernaculaire : Christoph Machat" <cmachat@netcologne.de>,

CSI Architecture et Urbanisme Coloniaux Partagés :" K. A.
    Ottenheym" <icomos@erfgoedhuis.nl>,

CSI Architecture en Terre : Fernando Pinto" <icomosterra@mail.telepac.pt>,

CSI Formation : Joseph King" <jk@iccrom.org

Appendix Q

Outline of RecorDIM Gaps and Needs

(Note that the following headlines were taken from pages 9-12 of Roundtable-1 report)

1. To improve perception and communication in heritage recording, documentation, and information management

- By information dissemination
- By creating bibliographies, thesauruses, definitions
- By creating focused newsletters
- By establishing integrated professional networks
- By encouraging joint symposia, seminars and tradeshows
- By involving the private sector and outside organizations

2. To integrate recording, documentation and information management activities into the conservation process

- By developing and implementing recording and documentation processes
- By including recording, documentation and information management practices in conservation management guidelines

3. To increase resources for documentation

- By promoting its benefits
- By writing related policies

4. To define, develop and promote documentation tools

- By writing / sharing:
  1. Standards
  2. Guidelines
  3. Handbook
  4. Best practices:
     - By encouraging the development of software
     - By encouraging the development of hardware
     - Other tools required:
       - Tools to enable cost-benefit analysis
       - Case studies
       - Economic models
       - Tools for estimating, procuring and tendering

5- To make available training and learning programs in recording and documentation

- By offering courses, seminars, workshops, etc. through:
  - CIPA
  - ICOMOS
  - ICCROM
  - National conservation organizations
  - Universities
  - Other groups and organizations

- By establishing certification and accreditation

Appendix R

Framework of RecorDIM Task Groups

(draft for discussion with Liaison Officers - 26-02-03)

It is proposed that the **headings** *of Gaps and Needs (from pages 9-11 of Rourdtable-1 report) be used as a Framework (or table of Contents) to list the RecorDIM Task Groups being developed within this Initiative. This way of presenting the Task Groups will provide the reader with a logical link between the gaps identified during Roudtable-1, and those being addressed by Task Groups.*

(note to Liaison Officers - It should be mentioned that the Task Groups highlighted in red hereafter should be presented and discussed during the RecorDIM Partners Meeting in Vienna – March 23-25, 2003. Consequently, Peter, Giora, Francois, Robin*, Natalie* and Sarah should be producing a draft Task Group proposal prior to the meeting, and sent it to Robin for feedback. (* indicates that they have already sent their pTG proposal to Robin)

Also, the following color code is not in operation yet but is used here to show how this coding can be used when this information is presented on the RecorDIM web site)

The Task Groups highlighted in **red** hereafter have been defined, and are in the process of being approved by the RecorDIM Liaison Officers.

Task Groups highlighted in **green** have been accepted and are active.

Task Groups highlighted in **blue** are being discussed and considered.

1. **To improve perception and communication in heritage recording, documentation, and information management**

   - By information dissemination

     - **PWGSC RecorDIM Task Group**
       - Natalie Bull / Robin Letellier
       - *RecorDIM Information Warehouse (*)*

   - By creating bibliographies, thesauruses, definitions
   - By creating focused newsletters
   - By establishing integrated professional networks

     - **CIPA & ICOMOS**
       - **Giora Solar and Peter Wauldhäusl (to be discussed in Vienna)**
       - **Proposed title -** Communication & Understanding

- By encouraging joint symposia, seminars and tradeshows
- By involving the private sector and outside organizations

2. To integrate recording, documentation and information management activities into the conservation process

- By developing and implementing recording and documentation processes

  - **PWGSC RecorDIM Task Group**
    - *Natalie Bull*
    - *Integrating RecorDIM activities to the Conservation Process*

- By including recording, documentation and information management practices in conservation management guidelines

3. To increase resources for documentation

- By promoting its benefits
- By writing related policies

4. To define, develop and promote documentation tools

- By writing / sharing:
  1. **Standards**

  2. **Guidelines**

     - *Getty Conservation Institute*
       - *Francois Leblanc*
       - Generic RecorDIM Guidelines

     - *US Parks Service*
       - *Blaine Cliver*
       - Landscape Guidelines?

     - *ICOMOS Australia*
       - *Graham Brooks*
       - GIS Guidelines (to be discusses)

     - *WMF*
       - *Gaetano Palumbo*
       - **GIS Conservation Management Guidelines?**

3. **Handbooks**

   ▪ *Getty Conservation Institute*
      - Francois Leblanc
      - RecorDIM Handbook
   ▪
4. **Best practices:**
   ▪ By encouraging the development of software
   ▪ By encouraging the development of hardware
   ▪ Other tools required:
      - Tools to enable cost-benefit analysis
      - Case studies
      - Economic models
      - Tools for estimating, procuring and tendering

5- To make available training and learning programs in recording and documentation

- By offering courses, seminars, workshops, etc. through:

- *CIPA*
  - *Summer School*
    - *Peter Waldhausl*

- *ICOMOS*

- *ICCROM*

  ▪ Training Seminar
    o Alejandro Alva

- *National conservation organizations*

  - **English Heritage**
    - Sarah Lunnon / Bill Blake
    - *Training: Metric Survey Skills in Conservation (*)*

- *Universities*

- *Other groups and organizations*

- By establishing certification and accreditation