MANAGING INSTITUTIONS OR MANAGING EGOS? THE CHALLENGES OF CULTURAL HERITAGE SHARED MANAGEMENT

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ABSTRACT
This article is focused on discussing the challenges of cultural heritage shared management at world heritage sites in developing countries. The purpose is to examine stakeholder collaboration in cultural management by identifying challenges for reaching shared objectives and values. This discussion is part of a study which investigates cultural-heritage training initiatives aimed at strengthening regional capacities through preservation education at world heritage historic centres. It inquires into the impact of socio-cultural values and practices on cultural heritage training program in North-Eastern Brazil. Three aspects are explored: (1) the need of channels of communication between the heritage institutions and stakeholders, (2) the challenge of achieving local community involvement in decision making processes, and (3) how the personal interests of institution leaders involved in decision-making processes impact on cultural heritage shared management.
Key words: cultural heritage, stakeholder collaboration, shared management, developing countries

RÉSUMÉ
Cet article se concentre sur l'examen des défis de la gestion partagée du patrimoine culturel dans les sites du patrimoine mondial en les pays en développement. L objectif est d'examiner la collaboration des intervenants dans la gestion culturelle, identifiant les défis pour l'atteinte objectifs et valeurs partagées. Cette discussion s'inscrit dans le cadre d'une étude qui examine les initiatives de formation en patrimoine culturel, visant à renforcer les capacités régionales à travers l'éducation de la préservation des centres historiques patrimoine mondial. Il interroge sur l'impact des valeurs et des pratiques socioculturelles sur le programme de formation sur le patrimoine culturel dans le Nord-est du Brésil. Trois problèmes sont explorés: (1) la nécessité de canaux de communication entre les institutions patrimoniales et les parties prenantes, (2) l'implication des communautés locales dans les processus décisionnels, et (3) comment le intérêts personnels des dirigeants des institutions impliquées dans les processus décisionnels impact sur la gestion partagé du patrimoine culturel.
Mots-clés: patrimoine culturel, collaboration des intervenants, gestion partagée, pays en développement

INTRODUCTION

Within harsh contexts in developing countries, we can observe the level of difficulty and complexity in trying to establish successful management practices in the heritage system. Professionals face great challenges when seeking solutions to such diverse problems, whilst meeting the demands of the urban and social order, and trying to optimise little resources and generate synergies.
As stated in the Vienna Memorandum (United Nations Educational, Scientific and Cultural Organization - UNESCO, 2005), continuous changes in functional use, social structure, political context and economic development that manifest themselves in the form of structural interventions in the inherited historic urban landscape, may be acknowledged as part of the city's tradition, and require a vision on the city as a whole with forward-looking action on the part of decision-makers, and a dialogue with other actors and stakeholders involved.

Historical centres are systems, an intrinsic net of urban and human components, interminably interacting with one another. Cultural heritage preservation encompasses urban and built environment issues, political and economic demands, social practices and cultural values of a given community, therefore a large group of interests need to be attended to and integrated (International Centre for the Study of the Preservation and Restoration of Cultural Property – ICCROM, 1995). For that reason, cultural managers need to perceive this complex net of relationships as a process, rather than isolated entities, conditioned by political, social, economic and cultural constraints over time (Van Oers, 2010).

Finding ways to develop better management tools has been a top priority on the agenda of institutions, planners and technicians. In that sense, the constitution of forums which promote shared management of cultural heritage can be a useful managerial instrument. Shared management initiatives has emerged worldwide with the purpose of amplifying and integrating social participation into the management of cities, thus strengthening the current participatory channels and seeking to incorporate new social actors in debates and decision making processes. However, how hard is to establish shared management environments in such complex contexts?
Collaborative, rather than adversarial, behaviour among all related stakeholders and institutions is essential for contributing to more socially sustainable heritage preservation practices. That is the fundamental base of shared management. Reaching these practices for integrated preservation is a new challenge to urban heritage conservation professionals and managers, particularly in a Latin American context, whereby heritage preservation is not usually seen as an essential component of the urban development process in the face of poverty matters.

The cultural heritage decision-making process needs to take a multidisciplinary and intersectoral approach, involving the conciliation of several institutions from different political spheres, as well as social participation.
In this paper, we explore three issues of management practices for historical centres: (1) the need of communication channels between heritage institutions and stakeholders, (2) the involvement of the local community in decision making processes, and (3) how the personal interests of institution leaders involved in decision-making processes impact on cultural heritage shared management.

ABOUT THE STUDY

This study is part of a research which investigates strategies to strengthen regional capacities through exploring the influences of the socio-economic and political local context on the management of education training programs for heritage preservation. The study inquires into challenges to be overcome in order to guarantee appropriate performance and continuity of training programs in poor regions of North Eastern Brazil. From a methodological perspective, the research is a critical auto ethnography conducted within a critical-constructivist paradigm. The Northeast region of Brazil was chosen as a research site with a view to identify preservation and educational issues. The research is focused on: (1) identifying socio-cultural factors, practices and values influencing the management of conservation training centres, (2) investigating the effects of socio-economic factors within cultural heritage education programs on social justice, cultural inclusion and social equity and (3) identifying quality indicators and formulating guidelines for the evaluation and ongoing monitoring of the effectiveness of conservation training programs, aiming to enhance knowledge and practice of local professionals in charge of safeguarding.

This study involves human, cultural, social and political elements within the chosen context. It inquires into challenges that need to be overcome in order to sustain the proper performance standards of the training programs. Local issues were identified by professionals in the field and were coded in eight different themes:

Influence of socio-political and economic context on training centres management; Training centres' interaction with local communities – focused on social participation in decision making processes; The level of attendance to the legal and technical framework; Technical and theoretical challenges (teaching and learning issues); Preservation education training and social inclusion; Monitoring, evaluating and follow-up of graduated students; Graduate professionals and the civil market; and Interaction between the preservation training system and other related systems.

This investigation employed ethnographic methods to achieve the project outcomes, such as direct observation and semi-structured interviews. Data gathering was followed by data analysis which has identified preservation and education issues. The study provides new insights on local urban preservation schemes and on, whether or not, they fulfil their primary function of maintaining existing physical, social and cultural structures in historical centres, and assuring compatibility between these structures and contemporary societal needs.

The results of this study will be used to help formulate guidelines for evaluating, monitoring and improving existing and new preservation training initiatives, informing policy development and helping improve training practices, particularly in Portuguese- and Spanish-speaking countries in Latin America, Africa and Asia.

NEGOTIATION ENVIRONMENTS FOR SHARED MANAGEMENT

With the current size and projected increase of the world's population living in urban areas, together with the lack of policies to recognize and facilitate sustainable use of heritage assets, the pressures on historic cities will continue to rise, causing preservation management to be a most daunting task (Van Oers, 2010). In developing countries it is possible to observe the difficulties involved in achieving successful management practices of historical sites affected by their harsh socio-economic and political contexts.

Due to the struggles for meeting basic needs, heritage preservation and other cultural issues are not usually seen as an essential component of the urban development process in the face of poverty and social inequality (The World Bank, 1999). However, cultural preservation is important for maintaining physical, social and cultural structures of a society by seeking to reconcile these structures with new uses and functions of a society in constant transformation (de la Mora, 2002).

Contemporary public management is marked by the decentralisation of decisions and by political responsibilities, as well as participation by society in selecting development alternatives (Pontual, 2012). In Brazil, since 1990, urban revitalisation has been integrated as a local development strategy, therefore demanding a more participative urban management process and an increase of groups interested in preservation. This occurred within an environment in which urban management is directed towards resolving not only social issues but also matters related to the local economy (Zancheti and Lapa, 2012).

This holistic approach requires instruments which enable and consolidate the process of management decentralisation. Policies are no longer determined through administrative measures, define and imposed by society. Instead, the new heritage management demands strategic planning, management of interests, mediation on conflicts, social accords, political coalitions and interdepartmental interaction. The strategic planning applied to cities has a focus on the construction of consensuses among internal and external partners of any given public organisation (Pontual, 2012). Strategic planning also requires that a city's management be based on an interdisciplinary and intersectoral structure, whereby knowledge and practices, recognised as valid, support the decision-making process.

In the field of heritage management, integrated planning must be capable of linking urban policies and the coherent engagement of the various governmental and societal sectors into the planning and management of policies, programs and projects in order to generate sustainability for this process (de la Mora, 2012). Cultural heritage management demands the participation of all related actors who produce, use or contemplate the urban space, all of whom have different, divergent and often competing interests. The establishment of mechanisms capable of linking, conciliating and potentiating these different interests, experiences and resources from the public, private and social sectors is essential for shared management practices. It improves the relationship among all interested stakeholders, encourages the involvement of local people, prepares social actors for decision-making processes, and makes the most of the available resources of institutions.

These channels, usually called forums or councils, are hard to establish and maintain as working with different people and institutions, with different policies framed by different philosophies, tend to generate conflicts. The ability to mediate conflicts and the interests of various stakeholders involved in the conservation process of a city's cultural property is fundamental to the construction of a consensus and of political coalitions, seeking to operationalise interventions and make conservation planning and management effective and efficient.
According to the Operational Guidelines for the Implementation of the World Heritage Convention (UNESCO, 2008, paragraphs 39 & 40), management and monitoring of heritage that is based on the partnership between governmental sectors, private organisations, owners and local communities, provides a significant contribution to the protection of World Heritage properties. Institutions and local stakeholders need to construct partnerships and cooperation to attend to the interests of all parties involved in the process of preservation. According to the Declaration of Amsterdam (International Council on Monuments and Sites – ICOMOS, 1975) local governments have a special responsibility for the protection of the cultural heritage. State intervention is necessary and indispensable, however governmental action alone is not sufficient to reach effective results in managing cultural institutions.

Based on experiences in Brazil, we note that councils and forums which gather representatives from private and public sectors have a strong, positive impact on the heritage management process. Working under a regime of joint management avoids overlapping actions and generates synergies for the elaboration of intervention proposals and multidisciplinary and intersectoral plans.
The establishment of shared management mechanisms able to incorporate interests, efforts and capacities from diverse related sectors can generate a number of positive effects, such as more realistic analyses produced collectively from diverse viewpoints, solution proposals constructed from the real and specific interests of each sector, and more effective actions since results achieved through a consensus are supported and adhered by all those involved.

THE CHALLENGE OF ACHIEVING LOCAL COMMUNITY INVOLVEMENT IN DECISION MAKING PROCESSES

The process of preservation management often does not originate from what it should; that being an important partner: the local community affected by the interventions. Investigating the management of historical sites in North-eastern Brazil, we can observe that this process does not seem inclusive of these people. Why is it so difficult to include local community representatives in processes of shared management in developing countries? Is this situation caused by political decisions, social consequences or educational restrictions? There are a number of considerations to be approached in this topic.
Firstly, let us briefly analyse what social exclusion is. According to Silver (1994), socially excluded people are those who live in "areas in need", where living conditions are precarious, social services are inadequate and there is a lack of decent employment opportunities. All of this combined generates an environment of marginalisation. Social exclusion can thus be understood as the inability to produce due to lack of opportunities, which can lead to a state of deprivation (Sen, 2000). Above all, however, social exclusion is multifaceted, encompassing political aspects such as a lack of active voices in the decision-making process, weak social relations, and educational aspects (De Haan, 1999). Social exclusion deprives the individual of participation as a result of low-income status (Burchardt et al, 2002). It can entail the systematic denial of rights to services and resources and the refusal of the right to participate equally in social relations in the economic, social, cultural or political domains (Kabeer, 2000).

Therefore, the absence of effective social participation within the process of shared management is not an occurrence which can be analysed detached from its links to social and educational matters. The lack of understanding by people in regards to matters pertaining to human rights, access to culture, social participation and control, and as investigated in this study, in regards to the preservation language and its procedures, is an obstacle of fundamental importance to be overcome. The direct involvement with local communities is essential, given that preservation is relative to what local people believe is worth preserving (Gilmour, 2006.).
Some practices around the world have demonstrated that the hunt for partnerships which seeks to establish synergies in the organisation and mobilisation of society with the goal to construct and maintain a continuous and politically oriented work. The sharing of previous experiences, good or bad, with local communities are great

ways of improving the efficacy and efficiency of conservation programs. Shared values and a common language between planning partners and clear action plans for those involved are also necessary.
In light of the socioeconomic profile in Brazil, it seems evident that if the public power has intentions of including communities in the preservation process, time and resources need to be invested in participatory strategies. According to de Paula (2005) these strategies need to allow for the necessary learning so that local communities, through practical experience, "are capable of identifying potentialities, opportunities, comparative and competitive advantages, problems, limits and obstacles to their development, from which they can choose vocations, establish goals, determine strategies and priorities, monitor and evaluate results, in order to gain the required capacity to plan and manage, in a shared manner, the process of local development" (p.6). As Nye (2004) states, 'contemporary practices of community-based policy-making, rely on making the policies sufficiently friendly and attractive that a community wants to help them achieve shared objectives' (p.6).
The social exclusion we currently face is not only economic and social. It also has cultural aspects, wherein people's ability to understand is affected by their socio-political contexts. Understanding the complexity of the problem is the first step to comprehend the scale of the challenge, which is to exercise the pedagogical function of inclusive public policies so that citizens are able to fully exercise their sense of belonging to their place and to actively participate in the history of their country (Ananias, 2005).

MANAGING INSTITUTIONS OR MANAGING EGOS?

Analysing heritage management practices in Brazil, we can observe that often the challenge is not managing institutional interests, but rather the personal interests of institution leaders. Each leader interprets institutional policies according to their interests. This occurrence can be attributed to human nature, as it is in human nature to be selfish. This means that in any decision made, consciously or unconsciously, personal self-interests will prevail in detriment of collective interests (Allison and Zelikow, 1999). The matter is not a discussion whether this reality is beneficial or harmful; rather we recognise that this behaviour is instinctive and should be taken into account in decision-making processes.

Negotiation requires a clear definition of roles for each actor involved in the decision-making process: who decides, what the objectives to be achieved are, and which are the ways to reach these objectives. Firstly, it is necessary to highlight that negotiation sustainability in collective projects, relies on the adherence of four principles (De la Mora, 2002): (1) Universality, wherein the actors involved, directly or indirectly, must participate in the negotiation process, be it from a political economic or social perspective;. (2) Representativeness, which advocates that individuals who participate on behalf of public, private or community institutions, must be capable of effectively representing their organisations; (3) Transparency, whereby there should exist the provision of accurate information about problems, contexts, intended objectives, planned and ongoing strategies, and expected outcomes; and (4) Equity, by which none of the participants must feel excluded or neglected in the process. All must conclude negotiations with the feeling that their gains and accomplishments are satisfactory, both to their institutions and themselves at a personal level.

Negotiating personal conflicts of interests is much more challenging than negotiating institutional interests. Institutional policies are written, human behaviour is not. These conflicts come from diversity and it is not only regarding the institutional frameworks but it includes differences in the personal characteristics of representatives: personalities, values, personal interests and beliefs, which will impact on their attitudes in a negotiation environment. However, the conflicting interdependence of objectives is the reason negotiations exist (De la Mora, 2012). Conflicts are very welcome and encouraged in negotiation processes while they are constructive. It occurs when people focus their discussion on the shared issues, maintaining respect for people who hold other points of view (McShane, Olekalns and Travaglione, 2010). Different viewpoints are useful for exposing and clarifying ideas, making all participants re-examine their assumptions, bringing unresolved problems to the table, highlighting new issues, and allowing new insights about core matters.
Observing some experiences of negotiation forums in Latin America, it is possible to notice that conflict seems to be rooted in two factors: when there is not a good flow of communication and where representatives are inflexible. Firstly, problems arise when there is not sufficient communication, creating a lack of understanding and consequently suspicion in regards to new ideas. Secondly, flexibility strengthens a net, enabling all representatives to present their viewpoints, in listening and being listened to, within a respectful environment. The important point is to focus the discussion on core matters and problem-solving.

The main challenge in managing negotiation environments is keeping healthy debates, avoiding personal attacks or unsolved personal issues, which can bring negative effects on team decision-making. Finding ways to manage egos and achieve a high degree of personal and institutional satisfaction is essential for the establishment of more effective decision-making processes. This conciliation requires overcoming personal and even professional conflicts derived from a political struggle involving institution leaders. Within political spheres, leaders compete with one another. The purpose of this rivalry seems to be to obtain the most authority and influence, thus managing to survive within the competitive environment found in developing countries. Institutions always seek survival (Waltz, 2001).

Determining who will lead the negotiation process is also an important factor for the establishment of successful shared management environments. Shared management processes only function effectively under strong technical and political leadership. In that sense, it is important to understand that leadership is not a matter of issuing commands but rather, it is the power of attracting others to work together in order to reach desired outcomes. Power to lead negotiation environments arises from the ability to influence the behaviour of others to attain pre-determined shared outcomes.

It is also important to understand that the nature of power has changed (Nye, 2004). The ability to make a group work together is relative to the ability to seduce and persuade. Leaders of negotiation environments have to provide strong political interaction, resources mobilisation, creativity in solving problems and conflict-resolutions, and motivation of different agencies involved in the decision- making process.
Furthermore, effective participation evokes concepts of division and sharing of the benefits of collective action between partners involved (De la Mora, 2002). To this end, participants of forums for shared management need to be 'embedded' in a common environment of shared values and ideas. In this common 'world', where they can engage in dialogues, recognising one another as legitimate, enabling them to listen to each other without distraction, distrust or disrespect (Mattern, 2007). This tends to lead to a hegemonic environment wherein common practices are accepted and applied by all partners. Hegemony is fundamental for shared management and it is only possible within a community whose members share core values and is limited to activities that are understood to support common identities (Lebow, 2007)

At this point, it is very important that all representatives be aligned with the forum's core values. Creating shared values and feeling of 'us' amongst work group members (Analouei, 1999), insuring their commitment to the common goals is an important role of shared management forums. The common goals have to be well defined and understood. However, stakeholders' objectives are not always explicit seeing that, as mentioned previously, the personal interests of each head of institutions impact on the institution's standpoint during negotiation. It is necessary to identify the strongest interests from each stakeholder, not as institutions, but rather as a political leader from a particular institution. Each leader wishes to obtain the most benefits for their institution, but above all, for themselves. It is important to collect the most information possible about institutions' representatives, so as to identify why he or she considers their participation in the shared management process beneficial. Identifying the benefits each participant is in fact seeking creates incentives to keep partners motivated and focused on the problems, so they can work collaboratively to find solutions which are able to assist the entire organisation in improving their performance over time (Hill and Jones, 2010).

Finally, managing to compose the forum as a collegiate, effectively plural, legitimate, representative, democratic and participatory is a great challenge. The first obstacle is managing to involve rival political groups and institutions. In Brazil, we can observe that political dispute is much too personal and some leaders refuse to even be in the same place as their political rivals. The plurality of actors in the forum cannot be merely from the political domain, but also from the social and economic spheres. We need to involve all social segments, and above all, those normally underrepresented or excluded. This requires mapping all sectors and identifying their leadership, assuring that all sectors are respectively represented.

CONCLUSION

Building relationships with a broad set of stakeholders, aiming to obtain shared outcomes, is the factor of success in shared management environments, and only total commitment from all related members is good enough (Lorange, 2010). The consolidation of a shared management agenda seems to enable a sturdy foundation and effective actions for the development of more adequate policies which match contemporary demands. This principle extends to all areas, not just cultural heritage.

The quality of local urban planning and the sustainability of implemented measures rely on the solidity and depth of intersectoral interaction, as well as on the participation and engagement of actors and patrons of historic sites (De la Mora, 2012). Each section has a role to play. It is to harmonise and reconcile interests, seeking the conservation of material and immaterial heritage, social inclusion, and a more harmonious social and economic balance. None of this is possible without firstly potentiating the contributions from each sector which, together, have the capacity to produce much more than in isolation.

Shared management requires new approaches and a critical review of the current standards, policies and practices, and demands the integration of managerial actions. Even though each institution possesses their own policies and goals, all should work within a unitary system (Waltz, 2001). Decisions cannot be taken singly as heritage encompasses multidimensional aspects. Therefore, it is imperative to establish negotiation processes in order to achieve a consensus. All representatives should recognise the importance of “we” to engender cooperation and pursue desired shared outcomes.

Governments need to promote and implement mechanisms able to control the chaos caused by the lack of interaction between sectors involved with the process of heritage preservation. The structures created to carry out urban policies and implement local planning measures cannot exclusively belong to the domain of any particular sector or social segment. The legitimacy and representativeness of the diverse sectors and groups of interest, as well as their balanced configuration in the area of negotiation, will allow for the unearthing of solutions which are satisfactory to the principal interests of the majority. The most important point to consider within this discourse is that shared management may ensure that differences can coexist in the most peaceful manner possible but the reached consensus will never be 100% satisfactory to anyone. When the process involves managing people and their egos, hegemony is possible but unanimity is a utopia.

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