From paper to people: The complexities of developing guidelines for preservation education in developing countries

Karla N. Penna¹; Elisabeth S. Taylor²; Jorge L. Tinoco³

¹² Curtin University, School of Education, Perth, Australia; ¹³ Federal University of Pernambuco, Centre for Advanced Studies in Integrated Conservation, Olinda, Brazil

1. Introduction

Training programs which are implemented in poor regions are inserted within harsh socioeconomic and political contexts. They face issues that may affect the performance of heritage preservation of historic centres situated in those areas. Thus, developing local strategies to strengthen regional capacities in World Heritage sites demands the overcoming of context-specific issues. This premise must ensure the appropriate performance and continuity of training programs within contexts where heritage preservation is not usually seen as an essential component of the urban development process.

The process of knowledge transmission, the conservation procedures, the preservation management, and the practical application of local legislations and international recommendations established by international organisations such as UNESCO (United Nations Education, Scientific and Cultural Organization) and ICOMOS (International Council on Monuments and Sites) depend on the interpretation of these legislations at a local level. It is necessary therefore to establish an individual modus operandi, appropriate to each context, which takes into account not only relevant factors deriving from the local socio-political and economic scenario, but also the fact that preservation is a cultural construction: what needs to be preserved depends on what a particular group of people believes is worth preserving at a given point in time and in a specific physical site [Gilmour, 2006]. History demonstrates that preservation practices have followed intrinsic values in each era and that theoretical precepts are part of the developments these actions trigger. Thus, what is desired to be preserved or conserved are the temporal, social and subjective values inherent to cultural heritage, derived from social groups whom construct them [Hannesch, Silva, Granato & Carvalho, 2012].

Reflections on the issues which impact on the management and definition of guidelines for preservation education programs are addressed in this paper. They result from our professional experience and from academic and political discussions triggered throughout this research. It is not possible within the scope of this article to extensively discuss all issues which affect the practice of preservation education in developing countries. We highlighted some important points familiar to academic and professionals in the field of preservation.

2. About the study

This investigation involved human, cultural, social and political elements within the Northeast region of Brazil context. The aim is to inquire into challenges that need to be overcome in order to sustain the proper performance standards of the training programs. The research is focused on three points:

131
(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;
(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.

Local issues were identified by professionals in the field and were coded in four different themes:
(a) Influence of socio-political and economic context on training centres management;
(b) Training centres’ interaction with local communities;
(c) Education issues and the level of attendance to the legal and technical framework;
(d) Monitoring and evaluating process of the training programs.

Data gathering was followed by data analysis aiming to address what context-specific factors need to be taken into consideration. This procedure is necessary for the development of guidelines aiming to improve the quality of the educational experience and outcomes at training-centres in North-Eastern Brazil.

3. Context-specific issues
3.1 Influence of socio-political and economic context and management issues

In order to frame the discussion for this topic, we highlighted a number of socio-political and economic factors which impact the management performance of training programs. Firstly, through the interviews conducted with the participants of this research, it is possible to identify a common notion from all interviewees that there is a lack of political interest for preservation; preservation is a long and costly work where the correlation between value-for-money, invested resources and the results achieved are not politically advantageous. Politicians prefer prioritising high social impact projects, such as cultural events, where the investment is low in relation to the high visibility outcome. Preservation training programs, whilst public programs, are thus under the rationale of the economic appraisal.

In the Northeast of Brazil, conservation is justified only if it maximizes political benefits. Economic appraisal, therefore, tends to support public decisions. Preservation education proposals, even in being recognised as necessary initiatives, compete with several projects. At a macro level, funds have to be allocated to the various fields such as health, education and infrastructure. Preservation education is seen as an investment, assessed in terms of the impacts, costs and political benefits. Investments in preservation education still rely on the sensibility of the politician in charge and on political conjectures. All governmental instances related to heritage, within a certain period of time and specific place, must be determined to lead an efficient training course. For that, it is necessary to align
one’s strategies to the governmental goals of the politician in charge. The sensibility of this political leader is what determines the kind of technical and financial support the program will have, and it does not guarantee its long term continuity but rather only its existence during that particular political instant. Moreover, political discontinuity is another important issue. Programs and projects discussed, developed and executed by an administration are impacted by political leadership changes [Zarpellon, 2011]. With the change of a political leader at every new election, there is always a change of staff the follows. The new staff generally does not continue ongoing projects or plans that were discussed and developed in the previous administration. This discontinuity generates a tendency for governmental departments to develop short-term projects that can be implemented and start generating results within a maximum of four years from its inception. However, preservation training is a long, systematic and continuous process. The training of apprentices demands time for involvement with the work environment, from sensitisation and appropriation of their culture to the learning of specific technical procedures. This context in which training programs are inserted impacts on their management. This scenario is comprised of a collection of disarticulate and fragmented departments and actions. This situation compromises the comprehensiveness of interventions, the legitimacy of attributions and institutional responsibilities. During this research, it was possible to observe that the most successful programs were the ones developed and managed under a shared management system. In those, various institutional partners sought intersectoral integration of preservation policies, the active participation of all related stakeholders, social participation in formulating goals and financial cooperation of public and private, national and international partners. Cultural heritage training is not only a technical problem, but also a cultural and social problem [ICCROM, 2010], thus there are no universal management models to be followed. 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 [Operational Guidelines for the Implementation of the World Heritage Convention, UNESCO, 2008, paragraphs 39 & 40]. Under this circumstance, institutions and local stakeholders need to construct partnerships and cooperation to tend to the interests of all parties involved in the process of preservation.

### 3.2. Preservation education and local communities

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]. Preservation therefore must be targeted at those who live the daily social and economic struggles which historic centres in developing countries are subject to. For those people, much more than merely being a cultural asset, the historic site consolidates personal and social identities, creates identifications seemingly stable in time of change and turbulence, and provides economic activities. Community activity and involvement help sustain diversity and enrich
society as a whole, offering in conjunction with other new attitudes, the urban scene as a canvas for community expression, community empowerment, and social justice [Horwitz and Aravot, 2008].

According to Horwitz and Aravot (2008), many documents from the last decades have emphasised the affinity among preservation, education, and community. For example, the Declaration of Amsterdam [ICOMOS, 1975] promoted “Educational programs for all ages”, and the American National Council for Preservation Education, in which is asserted that “the coordination of education programs is crucial to the success of historic preservation in every town, city, and state across the country”. De Paula (2005, 6) states that any preservation strategy needs to allow local communities’ participation through practical experience. That way people 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”. As Nye (2004, 6) 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”.

People’s ability to comprehend is affected by their socio-political context. Preservation education training, as any other conservation tool, should interact with local people, identify their needs and try to fulfil their demands. Understanding the multiplicity of the social and educational factors is the first step to understand the dimension of the challenge: to exercise the pedagogical function of inclusive public policies. That is necessary for citizens to be able to fully exercise their sense of belonging to their place and to actively participate in the history of their country [Ananias, 2005].

3.3. Education issues and the level of attendance to the legal and technical framework

In September of 2000, representatives from 191 Member-States of the United Nations signed the Millennium Declaration, considered to be the most important international commitment in favour of development and the eradication of poverty and hunger across the globe (Ministry of Foreign Relations website, 2013). One of the actions taken by the Brazilian government in order to reach those goals is to invest in professional training seeking to reduce poverty through increasing the employability of people.

With the actions of the Brazilian government focused on certifying the largest number of people possible within the shortest period of time feasible, there is now a tendency to implement training courses significantly shorter than traditional ones. This may be affecting the quality of learning and teaching, as well as placing professional into the market who are not sufficiently prepared for preservation practices. This tendency also leads to the development of scopes focused mainly in technical procedures and practices, while preservation training demands a much deeper understanding of theoretical, cultural, social and historical matters. It would necessary, therefore, to have methodologies
centred in more broad approaches. Critical and constructivist vision of the teaching-learning process, for instance, could assist in increasing awareness for students about the factors which generate and maintain the current system of inequality and injustice, and for the teachers about the established set of values and beliefs which sustain their roles in the classroom [Taylor, 2008]. With the current dynamic of the modern world, education for manufacturing and artisanal trades has lost its most efficient educational component: traditional learning under the previous system of craftsman-apprentice training. This traditional form of training and effective method of knowledge transmission done from craftsman to apprentice through years of training and interaction has practically been abandoned. Current teaching methods have not demonstrated the same efficacy as they do not promote the same level of physical and emotional involvement by the apprentices with their tradesman and their art (heritage).

It was possible to observe that the success of training is not merely based on the workload or the technical and methodological structure of courses; rather they depend on the level of interest the apprentice dedicates to the craft coupled with his/her ability to execute the work. Apprentices who identify themselves with the trade, and see in it an opportunity for a career, are the ones with a shot at a success. Conversely, apprentices who receive a greater amount of information or a better quality education do not necessarily end up successful in the trade. A student’s aptitude with the craft also naturally divides those in the training centres who are merely there for the benefits (food, welfare among other financial incentives). Students have to see in restoration not just a qualification to have, but also their future. Craftsmen play an important role in this process, seeing that they are able to identify potential future conservators.

Training a conservation professional requires a life of learning, in which the apprentice follows the craftsman, learning the craft and also building his/her knowledge, in a cyclical process of continuous teaching-learning. In that sense, a new problem can be indentified in relations to current Brazilian legislations. The ‘bidding law’ (No. 8666) which governs over the civil construction industry in Brazil does not seem compatible with training programs. The cheapest-quickest scheme practiced by the bidding law, pressures construction companies and professionals to execute jobs as quick as they can, rendering impractical a craftsman’s dedication to train an apprentice. It is only possible to accomplish some form of training when a construction work is exempt from this law, which is a rare case. Even in these rare occurrences, the work must follow lists of fixed values for materials and services, giving little room for more time and more materials for training.

The lack of knowledge by administrators, manager, technicians and teachers about the methodological, technical and legal framework which govern preservation practices also affect the training. It was observed in the training centres under investigation, teachers and craftsmen teaching without the appropriate method and approach to preservation as well as administrators, managers and technicians who demonstrate a lack of knowledge of technical procedures, legislations, project management and budgeting. Many of whom
are engaged in training programs based on the positions they hold in politics, and not on merit or knowledge of the craft. Without expertise, the teaching efficacy is harmed and the training becomes under serious threat of providing inconsistent information. It is not possible to lead conservation training without such knowledge; otherwise, people are being qualified alienated from the local and global contexts which dictate conservation practice. The efficiency of the training is based on the consciousness of the staff to the preservation cause and this can only come from having said knowledge. It also depends on the decisions that the technical staff takes on what and how to preserve. Concepts such as authenticity and integrity apply anywhere however the modus operandi must be interpreted by these professionals and adjusted to the local context.

The target audience of the training courses has raised concerns among professionals. Courses targeting young people in situation of social vulnerability aim for social inclusion through empowerment those who live in an environment of risk, in which violence prevails as well as drug trafficking, prostitution and other risk factors. Following this model are the Workshops-Schools based on the Spanish model Escuelas Taller [AECID website, 2012]. These training are opportunities to open up new horizons for these youths, providing their inclusion in a work environment to which they would otherwise never have access. The problem is that statistically only approximately 5% of young people trained by these programs are actually absorbed by the market. Not all of them have the aptitude that the restoration market requires. Even those who demonstrate skill with the craft do not always demonstrate the willingness to follow the career of heritage conservation.

In addition to these problems, preservation education requires an attitude changing. Youth at risk require greater assistance as they come from a difficult background, immersed in dysfunctional families, exposed to social violence of all kinds. Social interaction, responsibility, citizenship, entrepreneurship, among other issues, has to be strongly worked with them. Psychologists, social workers and sociologists are critical in this process, however in general they have not been allocated sufficient time and budget for this purpose within the scope of the courses.

3.4. Monitoring, evaluating and follow-up processes
When analysing the data generated during the first phase of this investigation, it was possible to observe a discrepancy: conservation training centres reported a relative success in preparing graduates through practical programs. These data are demonstrated through quantitative indicators present in the official evaluation reports. However, this seems to be in contrast with the interviews and commentary from the participants of this research who claim that the courses do not provide the necessary knowledge for the graduates to adequately perform in the civil market. According to several interviewees, the socio-cultural challenges, among other contextual problems, affect the training performance and interfere with the quality of the professional training. Thus, the analysis of qualitative data helped to realize the effects of factors related to the context of the quality of training in poor regions, despite the
quantitative data showing a very different picture. Another issue identified in the research is that there has been no monitoring of the students after their graduation. Without it, there is no feedback for the process. It is not possible to know if the student is applying the knowledge in the market, if the knowledge received is adequate or sufficient, or whether they as professionals meet the requirements of the market. This highlights the importance of establishing qualitative analysis and evaluation of training programs based on socioeconomic impacts and effective changes in cultural values and practices. There is also a need to develop more effective mechanisms for monitoring, taking into consideration the practical, educational and social level of the programs.

4. Conclusion
The effectiveness of training depends on the efficacy of the transmission of knowledge, developed strategically, involving contextual factors and all actors (academic, public, private and social) responsible for heritage preservation. Educational methodologies for training programs in developing countries have a responsibility to bring to surface sensitive and essential discussions on sedimented ideologies. Public policies and political stances should be built on the vision of education as a means to create a more just, diverse and sustainable world [Taylor, 2013]. It is also necessary to find ways of reconceptualizing curricula in accordance with the values and needs of local actors within a critical-constructivist paradigm [Guba and Lincoln, 1989]. Educational practice should be the connection linking theory and practice, leading both apprentices and teachers/craftsmen of preservation to a deeper understanding of contextual complexities as well as a better understanding of the delicate balance between policies, strategies and stakeholders.

References
De la Mora L., 2002, Os Desafios a Superar para Desenvolver Programas de Preservacao Integrada, Recife: Editora Universitaria da UFPE.
Abstract
The purpose of this paper is to provide an overview of the preservation education in world heritage sites located in developing countries. The methods currently utilised have impacted on the practical application of preservation theory. This theory has been developed and discussed in academia and heritage organisations. The training programs are responsible for developing educational practices which serve as a bridge between theory to be followed and conservation procedures, considering for that key socio-economical and political complexities of individual local contexts. The establishment of methodological guidelines adapted to these sites demands greater efficiency in the transmission of knowledge, and define qualitative indicators for the monitoring and evaluation of training programs. This debate is part of a critical autoethnographic research focusing on identifying problems which influence the performance of preservation education programs in sites considered world heritage in developing countries. As a case study, we investigated training programs implemented in the Northeast region of Brazil.