Public Relations and the Fundraising professional in the Cultural Heritage Industry: a study of Spain and Mexico
Las relaciones públicas y el profesional de la captación de fondos en la industria del patrimonio cultural: un estudio de España y México

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Abstract

The present research aims to understand the current situation of strategic communication and public relations applied in the professional field of fundraising in the cultural heritage environment. It observes the current patterns used in the sector to obtain and generate long-term sustainable funding, through the stimulation of investors and International Cooperation projects from the European Union in line with UNESCO.

Two international case studies are compared: Spain and Mexico, through the selection of territorial samples in Malaga and San Luis Potosi. The methodology used is based on a combination of in-depth interviews with key informants and content analysis. In the first instance, the degree of application of communication and public relations tools for strategic purposes to directly attract economic resources to the management of cultural heritage (tangible and intangible) in the region is studied. In line with the results obtained, the current parameters and key indicators of the profile of the fundraising professional in public and private cultural management are presented.

Keywords: Sustainability, fundraising, public relations, heritage management, local development

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Resumen

La presente investigación tiene como objetivo conocer la situación actual de la comunicación estratégica y relaciones públicas aplicadas en el ámbito profesional de la captación de fondos en el entorno del patrimonio cultural. Se observan los patrones actuales empleados en el sector para obtener y generar financiación sostenible a largo plazo, mediante el estímulo de inversores y proyectos de Cooperación Internacional provenientes de la Unión Europea en consonancia con la UNESCO.

Se comparan dos casos de estudio internacionales: España y México, a través de la selección de muestras territoriales en Málaga y en San Luis Potosí. La metodológica empleada se basa en la combinación de entrevistas en profundidad con informantes clave y análisis de contenido. Se estudia en primera instancia el grado de aplicación de herramientas de comunicación y relaciones públicas con fines estratégicos para atraer de forma directa recursos económicos a la gestión del patrimonio cultural (tangible e intangible) de la región. En línea con los resultados obtenidos se presentan los parámetros actuales e indicadores clave del perfil del profesional del fundraising en la gestión cultural pública y privada.

Palabras clave: sostenibilidad, fundraising, relaciones públicas, gestión patrimonial, desarrollo local

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1. INTRODUCTION

Cultural heritage reflects the tangible and intangible heritage received by a society or community. For decades, mistakes have been made due to ideological or political discrepancies that have led to the destruction of cultural heritage around the world. Nowadays, institutions and organisations aim to preserve tangible and intangible cultural legacies (European Union, 2020). Their main objective is to raise awareness and stimulate the

need for care and sustainability of cultural heritage from a local to a national or global perspective. This is supported by new technologies and digitalization in its most communicative and conciliatory aspect.

An example of this is the numerous grants that the European Union will direct to this theme between 2020-30, or the celebrations and long-term projects such as the European Year of Cultural Heritage (European Commission, 2018) in collaboration with key partners and agents, such as the United Nations (UN) and its Sustainable Development Goals (SDGs) 2030 agenda, UNESCO (Sustainable Development Goals, 2020). Also, to point out its World Heritage certifications, the Council of Europe and the International Council On Monuments and Sites (ICOMOS) which is the global non-governmental organization, dedicated to promoting knowledge, methodology and scientific techniques for the conservation of architectural and archaeological heritage. But beyond public funding programmes and the social works of banks and foundations, there are other equally important sources of funding, such as patronage, sponsorship or fundraising, where any entity or even the general public can support these activities.

In this line Burghausen and Balmer (2014) and Torres-Mancera and de las Heras-Pedrosa (2018) point out the importance of the entities responsible for the custody and management and that they are ultimately responsible for the proper administration of resources and for building the loyalty of the stakeholders likely to support such management with the aim of optimizing cultural heritage in the long term.

Despite efforts to stimulate international cooperation between Europe and Latin America, tax incentive policies, local, national and supranational subsidies and Corporate Social Responsibility (CSR), there are civic, transformational (Sachs et al, 2019) and legal gaps that can be improved (Cinco Días, 2019). As a result, many institutions increasingly see clear fundraising strategies as essential. This implies the creation of fundraising departments and, of course, the training and hiring of specialized staff in this area. The aim is to highlight the reality of the fundraising professional and their impact on all these priorities.

The general objective of this research is to highlight the professional situation and the impact of public relations and communication with the different stakeholders likely to provide

sustainability to the economic needs of cultural heritage management entities in Europe and Latin America. To this end, a comparative study was carried out by means of representative case studies. The existing reality in the environment of the city of San Luis de Potosí, capital of the state with the same name (Mexico) and the city of Malaga (Spain) in the European framework were analysed.

2. THEORETICAL FRAME

Fundraising is one of the most important strategies with the greatest capacity for social impact when approached from the communication and public relations sciences (Kelly, 1995; Porter and Kramer, 2002; Holtz, 2002; De las Heras-Pedrosa, Ruiz-Mora and Jambrino-Maldonado, 2017; Castillo-Esparcia, 2019); when it comes to obtaining economic funding from public, private and individual investors to develop projects of general interest.

But over the years, other academic fields such as Economics (Friedman, 1970; Carroll, 1979; Rose-Ackerman,1982; Wartick and Cochran, 1985; Byrnes, 2012), Anthropology (Trivers, 1971; Grunig LA, 2000), Sociology (Bernays, 1928; Lerner, 1975; Emerson, 1976), Psychology (Allpot, 1935; Hovland, Janis and Kelley 1953; Katz and Kahn,1978; Petty, Wegener and Fabrigar, 1997; Chen, Duckworth and Chaiken, 1999) or even Political Theology (Johnson and Krüger, 2004), have studied with interest the bidirectional phenomenon between the art of persuasion and the art of giving; converging in this process corporate and social interests, the flow of communication, the value of the message, the management of relationships with stakeholders, decision-making and the perceived sense of return on investment (Torres-Mancera and De las Heras-Pedrosa, 2018).

Studies such as Andreoni and Rao (2010) point that fundraising and non-profit financial contributions are linked to interaction with various stakeholders, and the more organised and accessible this communication is, the more favourable, collaborative and effective it is. Since the emergence of the digital world, classic fundraising tools such as events, sponsorships or Corporate Social Responsibility (CSR) are giving way to a space in which they coexist with the online strategies of organisations through their official websites and social networks (Olsen, Keevers, and Covington, 2001). Nowadays, more than ever, internet presence and communication in online format are fundamental (Kang and Norton, 2004) to raise awareness

of the causes that organisations defend; and in this sense, with special emphasis on those linked to cultural heritage that need to raise funds to ensure their sustainability.

The approach to be followed in the theoretical framework of this research is based on three basic pillars: the management of communication and relations with stakeholders, the management of fundraising strategies and public relations professionals specialized in fundraising.

2.1. The management of communication and relations with stakeholders

Brand awareness is fundamental for the cultural heritage industry, but this implies an in-depth knowledge of the stakeholder. Therefore, an in-depth study of the publics that are directly or indirectly related to the institution and that can generate a positive image of them and their strategies is desired.

A review of the literature on stakeholders always leads to the initial work of Freeman (1984), which has increased throughout the 1990s with other works such as those of Donaldson and Preston (1995), Clarkson (1995), de las Heras-Pedrosa et al, 2017, or Freeman himself (1994), among others. All of them agree that stakeholder theory has its origins in the field of strategy and is based on the belief that the final performance of any organization must take into account all the stakeholders involved in it and the positive image of it.

From a PR point of view, the relationship between the organization and its stakeholders is analysed in order to understand the link established between them, where each group has certain interests in relation to the organization (Capriotti, 1999; Grunig, 2000).

For the case of the Cultural Heritage Industry there are authors who advocate the philosophy of adapting market-based management measures (Gornitzka, 1999) where government acts only as an observer and attributing to public institutions the freedoms of a self-regulating market (Mainardes, Alves and Domingues, 2009). The aim is to achieve higher levels of efficiency (Liu, Cheng, Mingers, Qi, and Meng, 2010) by encouraging more entrepreneurial management in a new, more privatized organization not only in business practices but also in its values (Denhardt and Denhardt, 2002).

Unlike for-profit organisations that generate their own income, fundraising is an essential source of funding for non-profit organisations (NPOs) such as cultural, educational or healthcare organisations (Moon and Azizi, 2013). These NPOs have been adopting the concepts of public relations and therefore stakeholder management.

In order for stakeholders to become donors to NPOs, a positive corporate reputation must be established, sponsorship laws must be in place to encourage and foster a culture of giving, stakeholders must have an interest in the NPO's cause, and they must be aware of and, where appropriate, control the purpose of the donated capital (MacMillan, Money, Money and Downing, 2005).

Thus, MacMillan et al. (2005) indicate that trust plays a fundamental role in the relationship between stakeholders and the organization. The development of trust is crucial in relationship marketing in general, but especially when talking about donations.

According to Srnka, Grohs and Eckler (2003) there are three conditions for a willingness to donate: the first is that the purpose of the NPO is in the individual's sphere, the second that the individual could benefit from the organization's services and the third that the donation does not represent too much expense or effort.

On the other hand, for Cho and Kelly (2014) there are three levels of cooperation. The first is the patronizing-philanthropic relationship, where the relationship is asymmetrical and the donor does not expect anything for his or her contribution and is truly altruistic. Secondly, exchange-transactional relationship, this relationship is based on give and take. The donation is made by the donor with the expectation of future benefits. In the third communal-integrative relationship, beyond the commercial exchange, the donor organization provides resources in response to the NPO's needs or at least with the concern for its welfare. In these cases, joint actions are carried out that benefit both organisations and integration between them is observed. This type of relationship is not altruistic as it seeks to benefit both parties. Grunig (2000) argues that a communal-integrative relationship is relevant when symmetrical two-way communication takes place.

2.2. The management of fundraising strategies

It is essential that the fundraising strategy is in harmony with and subordinate to the mission, vision, values and ethics of the institution (Mezo, 2004). Therefore, Pérez-Esparrells and Torre, (2012) start from the concept of fundraising, defining this fundraising process as the activities focused on "the communication of the values, objectives and results of an organization, and aimed at instilling them in people or entities that potentially want to share and commit to them, through possible voluntary financial contributions" (Pérez-Esparrells and Torre, 2012: 870).

Following this definition, the role of relationship management with future donors is a key element in this process.

Thus, there are two ways of obtaining additional income to state funds, the institutions' main source of financing: through the sale and/or exploitation of their products, and through fundraising by social agents. The latter form of fundraising, which implies a strong recognition of their contribution to society, is known as fundraising in the Anglo-Saxon world (Casani, Pérez-Esparrells and Rodríguez, 2010).

In recent years, motivated by the crisis or the pandemic suffered in the world and mainly in Spain and Mexico, it has provoked a debate on the need to adapt the funding system in order to achieve its objectives in an international and more competitive scenario.

Therefore, according to de las Heras-Pedrosa et al (2016), institutions should include in their strategic plans lines that contribute to:

- The integration of income diversification in the strategies of the Institution. Applying proactive policies for the attainment of income through different channels and the search for opportunities, involving the entire institution and finally inviting possible external partners for the implementation of joint actions.

- Believe in people and stakeholders. There is a need to raise awareness of the importance of investing in human capital development to improve skills and competencies for income diversification.

- Creating professionals who interact between institutions and their stakeholders. Improving the brand image and developing an awareness that the Institution is generating value for stakeholders and identifying areas of mutual benefit.

2.3. Public relations professionals specializing in fundraising

Undoubtedly, a solid policy of institutional relations and fundraising is outlined as the strategy par excellence for the complementary financing of the Cultural Heritage Industry, fundamentally those based on a paradigm of building two-way symmetrical relations of mutual interest for institutional sustainability (Ruiz-Mora, de las Heras-Pedrosa, and Álvarez-Nobell, 2016).

The public relations professional with a fundraiser profile should be part of the aggregate strategy to reinforce competitiveness by working at the confluence with a policy of dialogue and participation with all publics (de las Heras-Pedrosa et al, 2016).

As mentioned by Castillo (2010), fundraising is a planned action based on objectives that develops, executes and plans communication and public relations actions between an organization and its audiences, in order to raise funds for a specific cause (Matilla, 2011). It is an integrated and systematic method of relations to increase the support of stakeholders where the role of the public relations professional is that of an intermediary between the parties.

The mixed motivation model (Grunig, 2000) proposes a re-conceptualization of the symmetry of the two-way symmetric model (Grunig and Hunt, 2003) in the role of public relations in organisations (Matilla, 2009), where the public relations practitioner is seen as a cooperator, in an intermediate position between the organization and its environment. The authors start from the idea that the organization and the publics are advocates of separate interests that can find a zone of mutual understanding and the public relations practitioner stands in the intermediate zone of this understanding (Grunig, 2000). With this model, two-way symmetrical public relations is possible, as neither stakeholder gives up their interests, a situation criticised in the model proposed by Grunig and Hunt (Xifra, 2003).

3. METHODOLOGY

The conceptual model and key factors of the study involve an interdisciplinary approach (figure 1) with a circular effect that highlights the positive or negative feedback of cultural priorities, the economic needs for their sustainability, the professional management of communication and Public Relations (PR), the economic return of such efforts and their impact on society.
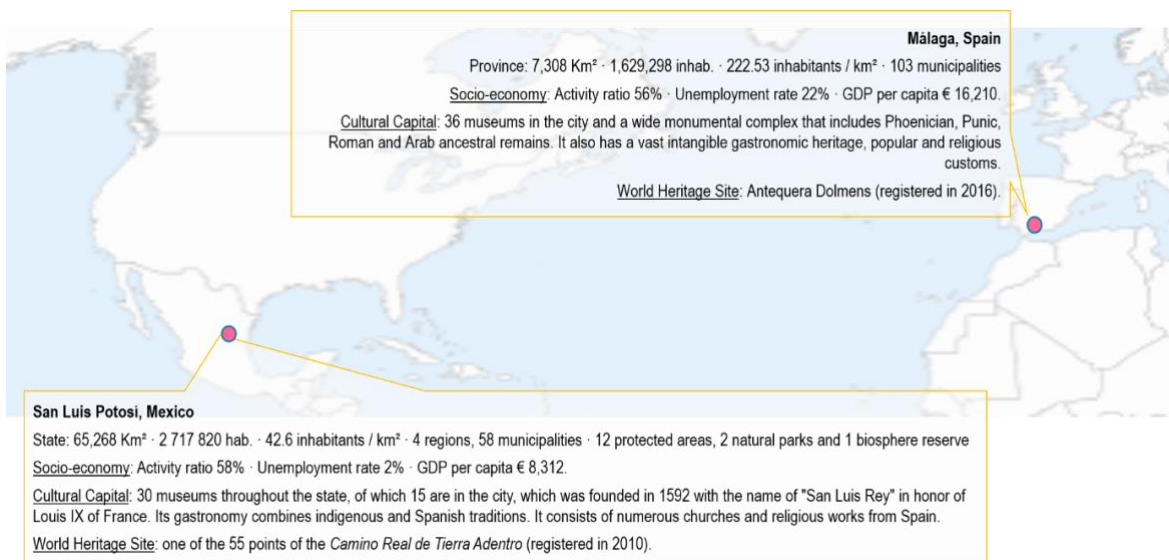
Figure 1. Conceptual model and object of study of the research

CULTURAL PROJECTS   SEARCH FOR FUNDING AND SUSTAINABILITY   PR AND COMMUNICATION PROFESSIONAL   ROI & SOCIAL IMPACT
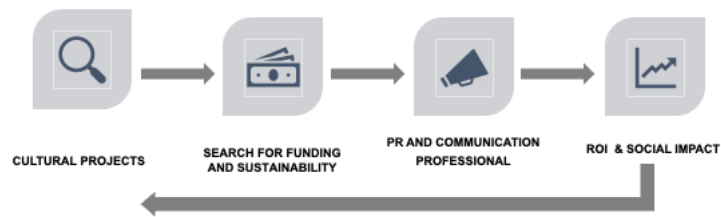
Source: Own elaboration.

In order to obtain a global vision of the different realities of the state of the question, two research environments rich in diversity (see figure 2) are chosen, but with a very important point in common: the strong local roots of their tangible and intangible cultural heritage, their effort to link up with the world list of World Heritage Sites endorsed by UNESCO, and the global sustainable objectives.

Figure 2. Location and indicators of the Ibero-American case studies. Sources: Instituto Nacional de Estadística, Geografía e Informática of Mexico (INEGI) and Instituto de Estadística y Cartografía of Andalucia

Málaga, Spain
Province: 7,308 Km² · 1,629,298 inhab. · 222.53 inhabitants / km² · 103 municipalities
Socio-economy: Activity ratio 56% · Unemployment rate 22% · GDP per capita € 16,210.
Cultural Capital: 36 museums in the city and a wide monumental complex that includes Phoenician, Punic, Roman and Arab ancestral remains. It also has a vast intangible gastronomic heritage, popular and religious customs.
World Heritage Site: Antequera Dolmens (registered in 2016).

San Luis Potosi, Mexico
State: 65,268 Km² · 2 717 820 hab. · 42.6 inhabitants / km² · 4 regions, 58 municipalities · 12 protected areas, 2 natural parks and 1 biosphere reserve
Socio-economy: Activity ratio 58% · Unemployment rate 2% · GDP per capita € 8,312.
Cultural Capital: 30 museums throughout the state, of which 15 are in the city, which was founded in 1592 with the name of "San Luis Rey" in honor of Louis IX of France. Its gastronomy combines indigenous and Spanish traditions. It consists of numerous churches and religious works from Spain.
World Heritage Site: one of the 55 points of the *Camino Real de Tierra Adentro* (registered in 2010).

Source: Own elaboration.

The city of Malaga has been working since 2000 to position itself as an international cultural reference, resorting to European funds in a first batch until 2013, and subsequently through the 2014-2020 economic incentive programme (CIEDES Foundation, 2018) of the European Commission (2019). For the new period 2020-30, the sustainable growth of the activities recommended by UNESCO's 2030 agenda, seek to be promoted by the City Council and other agents of the city under the premise of alignment between the city strategies and the entities that compose it, and the proposals contained in the Sustainable Development Goals (SDGs).

The city of San Luis Potosí has stood out in Mexico for centuries for its relevance in the mining, agri-food, commercial, political and cultural sectors. It is currently undergoing a process of economic resurgence thanks to business and industrial development in the area. In spite of its great cultural heritage, its tangible and intangible wealth is very much neglected, if not forgotten. This situation is affected by the average level of education of the population and the political quality of its rulers. The region yearns for the development and enhancement of its natural, cultural and human resources in order to dignify them. In this context, in addition to local talent, international cooperation programmes are highly sought after.

The methodological model constructed for the research is based on a mixed model with quantitative data collection based on the content analysis of all the cultural and artistic centers officially registered by local government of Málaga city and the regional government of San Luis Potosi. In accordance with this criteria, a total 36 websites of Spanish and 29 Mexican entities correspond to the selected categories "museums" and/or "cultural space" of "Málaga" and "San Luis Potosí". Likewise, the qualitative part of the research is based on interviews with experts who provide differential value to the variables under analysis (García-Talavera and del Río, 2005; Hernández, Fernández and Baptista, 2010) with respect to communication and PR in fundraising matters for their strategic cultural projects.

The purpose of the interviews is the detection of professional communication and PR tools and the capacity to attract financial resources through the practice of fundraising, as well as the nature and origin of the resources.

The samples selected in the case study follow the criteria of maximum representativeness of the information sources, through key informants in the institutions directly involved in the

management and preservation of the cultural heritage of each locality, and official websites (Table 1 and 2).

Table 1. Research design

Research design	Population	Sample	Focus and scope	Reporting sources
Spain	Málaga	Cultural entities, municipal and regional government	Communication, positioning and impact	Public and private
Mexico	San Luis de Potosí		Management of the region's cultural heritage	Academic and governmental

Table 2. Data collection instruments

Data collection instruments	Interviews	Reliability and validity	Content analysis	Observation
Spain	N = 23	Senior management and official sources	N = 36	Websites of museums and art centres
Mexico	N = 15		N = 29	

Key informant interviews are one of the potentialities of this study. The institutions and position of both cases are detailed below (Table 3 and 4).

Table 3. Key informants Malaga (Spain)

MALAGA - SPAIN KEY INFORMANTS INTERVIEWS	
INSTITUTION	**POSITION**
1. Tourism	
Malaga City Council	Technical Director Tourism Delegation
Asociación de Hosteleros de Málaga	Vice President
Junta de Andalucía	Provincial Tourism Councillor
La Cónsula	Director
2. Culture	
Malaga City Council	Culture Councillor
Festival Cine Málaga S.A.	Director of External Relations
Thyssen Museum	Managing director
Picasso, Pompidou and Picasso Museum	Director Public Agency for the Management of the Pablo R. Picasso's Birthplace and other cultural facilities
3. Municipal governance	
Malaga City Council	Delegate for Security, Tourism and International Institutional Relations
IMFE - Municipal Institute for Training and Employment	Managing director
Opposition Party	Leading spokesperson
Opposition Party	Councillor
Provincial Council	Vice President

4. University and business schools	
Junta de Andalucía	Education Counsellor
University of Malaga	Vice Chancellor Institutional Policies
ESIC Business School	Regional Director
ESESA Business School	President
5. Industry and business	
International Commission Chamber of Commerce	President
PTA - Technology Park of Andalusia	Deputy Director of Technology Transfer
Promalaga	Managing director
CEM - Business Confederation of Malaga	President
Malaga Port	President
ADEPMA - Association of Directors, Businesswomen and Professionals, Women in Andalusia	President

Table 4. Key informants San Luis de Potosí (Mexico)

SAN LUIS POTOSI - MEXICO KEY INFORMANTS INTERVIEWS	
INSTITUTION	POSITION
Historical Archives	Technical director
Historical Archives	Head Researcher
Universidad Autonoma San Luis Potosi	Dean Faculty of Communication
COLSAN University	President
COLSAN University	Founder
Municipal Government	Cultural Delegate
Leonora Carrington Museums	General Director
Local Indigenous Peoples and Communities	Local community leader
Local Indigenous Peoples and Communities	Local community leader
Local Indigenous Peoples and Communities	Local community leader
Secretary of State, Cultural Delegation	Culture councillor
Secretary of State, Cultural Delegation	Director
Local Development Secretary	Director
Tourism Secretary	Director
Professorship Communication socio-cultural development	Local research officer

4. RESULTS

The need for fundraising in order to give sustainability and trajectory to cultural projects is recognized by 100% of those interviewed in San Luis Potosí, compared to 83% in Málaga (Figure 3). However, in the case of Mexico, none of the cultural organisations have a professional department dedicated to such fundraising functions, although 80% of them do have a communication department. In the case of Malaga, a discreet 17% do have a public

relations area or professional dedicated to fundraising in their organizational chart, although 83% do have an area dedicated to communication.

**Figure 3. Data obtained from key informant interviews**
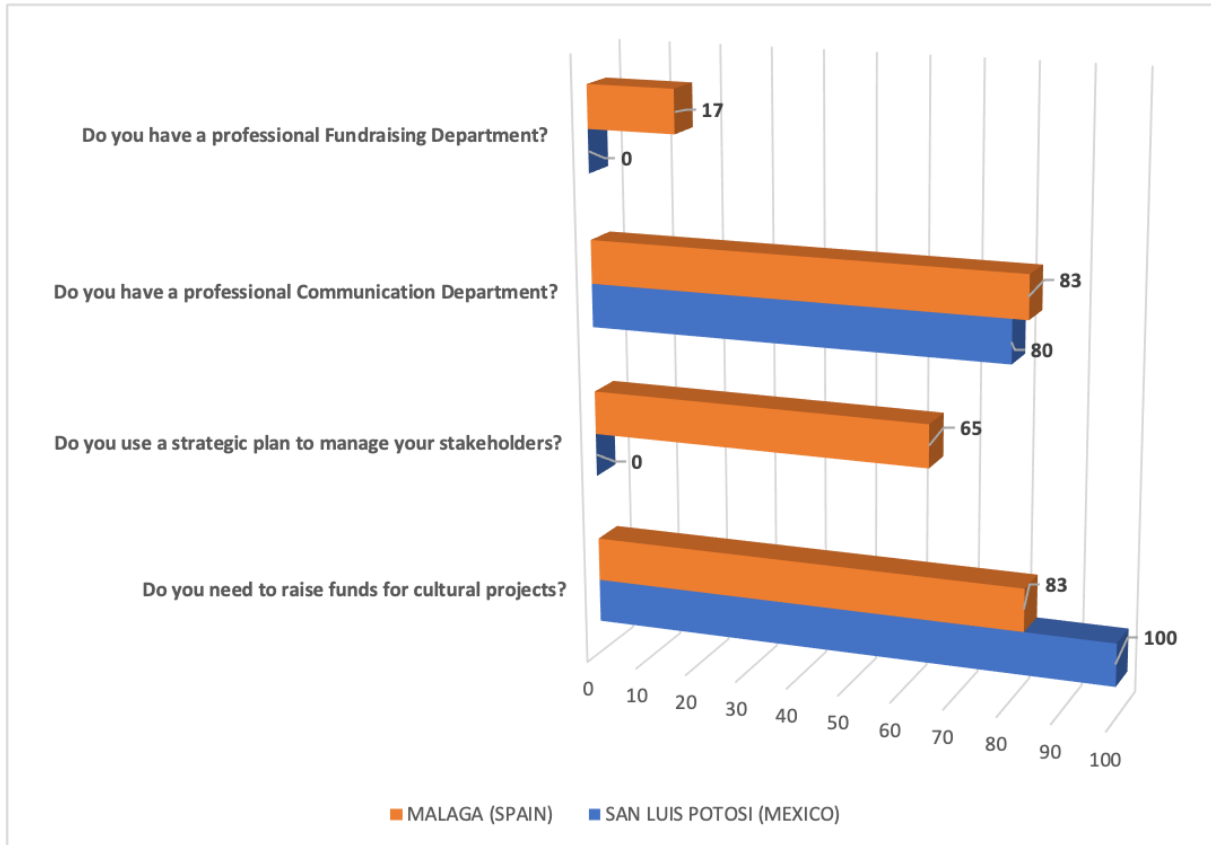
Source: Own elaboration.

In the specific study of the variables related to public relations applied to the efficient management of the different stakeholders, 65% of the participants in the case of Malaga declared having designed and in process a specific strategic plan in which they identify the different stakeholders of their cultural entity, and prepare a series of specific actions with each one of them. In contrast, in the case of San Luis de Potosí, 0% of the participants say they carry out such a praxis.

With respect to the sources of funding that sustain the cultural purposes and projects of the 65 institutions analysed through the content analysis, the dependence on public funds and management is 76% in San Luis de Potosí, with 48% from the state government delegation, 21% from the municipal government and 7% from the National Council for Culture and the Arts of Mexico (Conaculta), which is responsible for the comprehensive preservation of the Nation's cultural heritage in its various artistic and cultural manifestations, as well as for

stimulating programmes aimed at their creation, development and entertainment (Conaculta, 2020) (Figure 4).

Figure 4. Main source of funds and management of cultural organisations of San Luis de Potosi (Mexico)
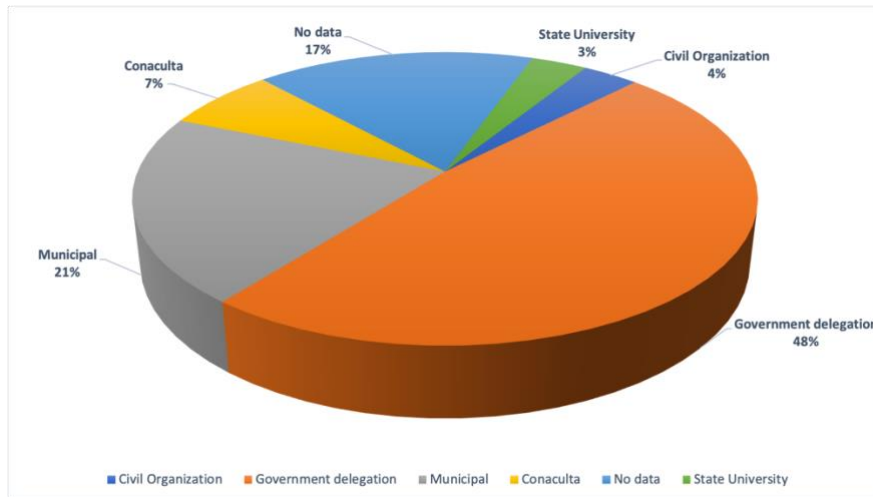
Source: Own elaboration.

In the case of Malaga, this direct administrative, economic and managerial dependence on public entities adds up to a cumulative 39% recognized by informants, with 25% from the municipal government and religious organisations, 11% from the regional government and 3% from the provincial government (Figure 5).

Figure 5. Main source of funds and management of cultural organisations of Málaga (Spain)
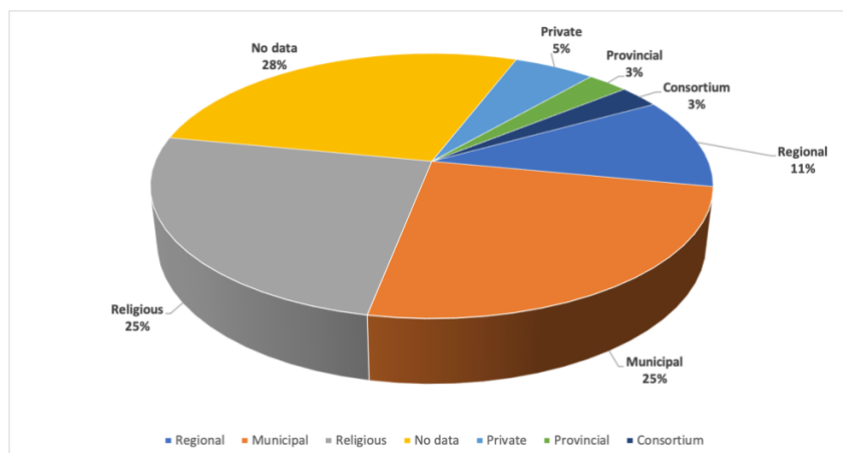
Source: Own elaboration.

Finally, the analysis of the positioning and communication of the web pages to transmit a reputational image that attracts economic support to the entities that support the main local cultural heritage. It is interesting to note that 55% of the entities dedicated to cultural and museum management in San Luis de Potosi still do not have a corporate website, and only 7% of those that do have one, have an easily accessible area to attract and inform the public of the different needs and possible forms of collaboration to help the sustainability of this cultural legacy (Figure 6).

In the Spanish case of Malaga, although 75% of them offer an official website to communicate their organizational activity, only 11% of them offer easily accessible content to transmit their economic concerns to attract potential patrons and donors to provide alternative capital to support their foundational purpose and the cultural causes they represent (Figure 6).

Figure 6. Web positioning of cultural entities to attract financial cooperation
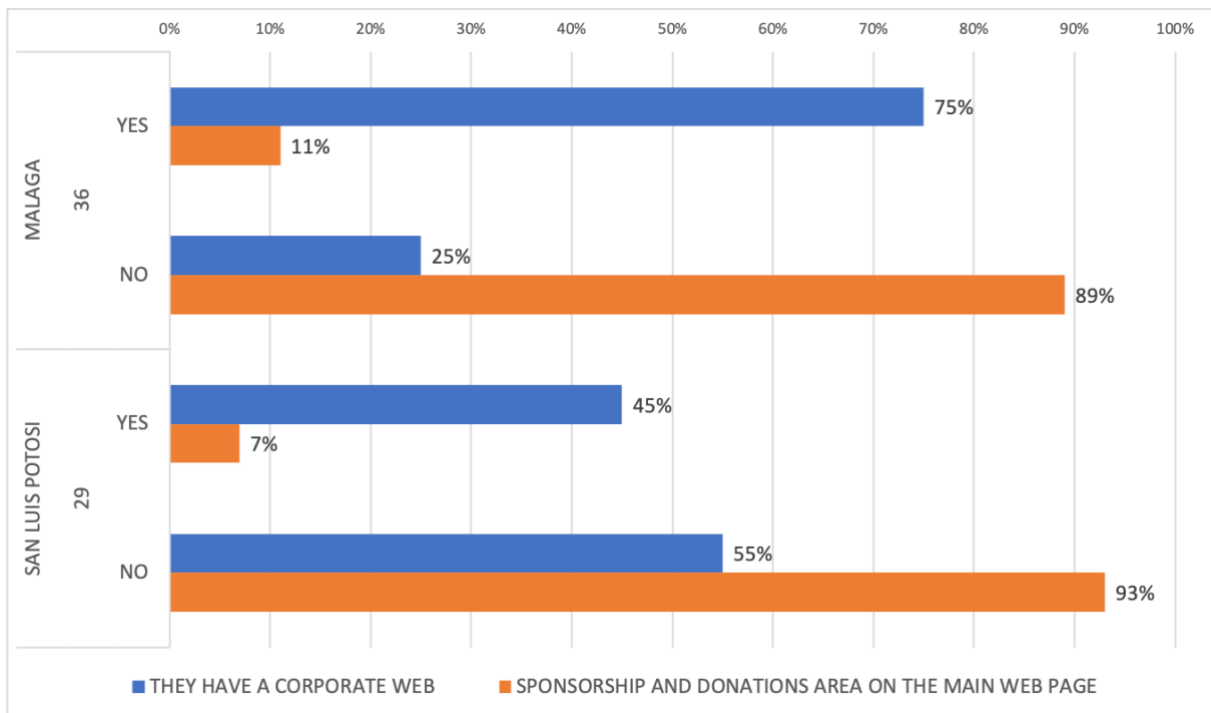
Source: Own elaboration.

5. DISCUSSION AND CONCLUSIONS

The data collected bring to light the desire to intensify fundraising practices in the entities responsible for safeguarding the cultural heritage of the Spain/Mexico panorama.

With regard to the design of a strategic plan where the different stakeholders of their cultural entity are identified and concrete actions are developed for each of the stakeholders, it is detected that in the case of Malaga more than half of the organisations are developing such a plan, while the institutions in San Luis de Potosí have not designed any plan.

Communication is an important element in these organisations. More than eighty percent of them have a communication department or a person specialized in this area. However, analysing the data obtained, they encounter two fundamental obstacles: first, although there are communication departments in both cases, there is an absence of professionals and departments specialized in fundraising based on practical knowledge of the application of communication and PR in a strategic way for this purpose; and second, there is little information on websites about the needs and possible ways of contributing financially to the sustainability of their cultural projects.

These facts, added to the delicate socio-political circumstances in Mexico and the absence to date of solid fundraising organizational charts in Spain, highlight a deficit in the efficient search for collaboration and growth plans, lacking competent staff and strategic management tools to attract real and stable value from society as a co-responsible agent.

This study perceives important disjunctions, on the one hand, between the desire for funding and the sustainable future of the Ibero-American cultural legacy; on the other hand, the premises of the Sustainable Development Organisations (SDOs) of the 2030 Agenda of the United Nations and the European Union and the real materialization of the ideas of a better world thanks to international cooperation and development policies (European Commission, 2018) of the resources to preserve so much heritage of value for humanity through fundraising.

The commitment to the integration of PR professionals in the management structures of cultural heritage, at least in the cases studied, could bring about an exponential increase in

the capacity to attract capital, the efficient use of resources and therefore an increase in profitability, sustainability and impact on society.

Expert and planned interaction with different stakeholders through PR and coherent communication of priority needs and missions are seen as key elements and indicators of success.

Therefore, far from these results being seen as negative factors, they are seen as a great niche of opportunities and emerging demand for the years to come, for any organization wishing to increase its value, reputation, sustainable economy and importance in the community.

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