



Competence driven training for Heritage Interpretation

The guidelines







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ISBN ???

Legal deposit: D/2016/8926/1

Published by: Guy Tilkin, Landcommanderij Alden Biesen, Kasteelstraat 6, B-3740 Bilzen

Project Number: 540106-LLP-1-2013-1-BE-GRUNDTVIG-GMP

Design: COMMIX Graphic Solutions – www.commix.be

This manual is also available in pdf on www.interpretingheritage.eu

Disclaimer: This project has been funded with support from the European Commission. This publication reflects the views only of the InHerit consortium, and the Commission cannot be held responsible for any use which may be made of the information therein.





Developing an introductory meeting/workshop on heritage interpretation for professionals and volunteers in the heritage sector

The Guidelines

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1. Introduction

In the past years a team of experts in the field of heritage interpretation and education worked together in a European project (Inherit). The aim of this project was to develop outlines of training programmes for heritage interpreters. Apart from developing these programme outlines and a related manual, the team also developed pilot courses to try out the key characteristics of the programmes in a brief introductory course on heritage interpretation. Based on these experiences, project members delivered similar courses in their national contexts. These experiences form the basis of this document in which guidelines are given for those who wish to introduce heritage interpretation in their own context as well. It may be considered a guide for organising a training event for people working in the heritage sector, wishing to explore the concept of heritage interpretation and experiencing its potential. The manual mentioned may be considered a background document from which the guidelines for a training event are derived.

1.1 Why heritage interpretation?

In Europe several ten thousands of people are involved in the field of facilitating informal and non-formal learning to visitors at natural and cultural heritage sites, monuments and museums. But probably only a fraction of this group has ever heard about the discipline of 'heritage interpretation'. Only a limited number of people working in the heritage field ever had training in communication skills targeting non-captive audiences. In many cases guides or curators start with a research oriented academic background in one of the heritage related disciplines such as biology or archaeology and then they learn on the job to communicate heritage to non-experts. They usually are highly respected as experts in the subject matter but often have only little understanding of professional communication principles. This regularly leads to poor quality products and activities in heritage sites... What

is needed to help visitors gain knowledge of, and affinity for, natural and cultural heritage sites, monuments and museums?

Heritage interpretation is the art to create a relation between the elements of a heritage site or collection on the one hand and the meaning making and value frame of the visitors on the other. Cognitive and emotional links are created between the visitors and what they can discover in a nature park, a historic site or a museum. It reveals deeper meanings, relationships and insights from first-hand experience and by means of illustrative media, rather than by simple communication of factual information. Heritage interpretation also contains a structural element of learning.

The InHerit team is convinced that natural and cultural heritage sites, monuments and museums offer the ideal context for visitors to learn, while heritage interpretation offers ideal techniques to make this learning as meaningful as possible. InHerit aims to improve learning in inspiring heritage contexts through professional staff development for realizing the full potential of heritage interpretation for non-formal and informal learning.

“Heritage interpretation uses a range of media but it is at its best when there is direct person-to-person contact.” Thorsten Ludwig (2014)

1.2 Target group

With these guidelines the InHerit team aims to help trainers to professionalize the following professionals in heritage:

- **Heritage interpreters or guides**

Heritage interpreters or guides are typical frontline professionals. Many work as volunteers, seasonal staff, freelancers, or as employees of heritage organization.



The interpreter's role is to facilitate the visitors' enjoyment, understanding and appreciation of the region they are visiting. His or her job is to interpret the 'language' of nature and the tapestry of history to those people who find themselves in a situation removed from their own realms of experience. In this way, the interpreter can open new windows of perception and inspire and add perspective to visitors' lives.

Through interpretation, a visitor can more fully appreciate the natural and cultural heritage of a region, and be moved to empathise with the need to ensure that such heritage is preserved. In this respect, interpretation is about helping people form appropriate attitudes towards the natural and cultural heritage of the area they are visiting, encouraging appropriate behaviour in fragile landscapes and encouraging visitors to take an active interest in the management and future of the area.

Another aspect of the interpreter's role is to provide an interesting, entertaining experience for visitors. Those people who participate in tours do so by choice rather than compulsion. They are on holiday. They are out to have a good time. The last thing they want is to be lectured to. They want to be involved. Heritage interpreters seek to achieve this in different positions and in different roles. In this document the focus is on three different kinds of positions, which will be further described below.

- **Interpretive Site Planners**

Interpretive Site Planners are the people responsible for interpretive plans for sites or tourism destinations.

Larger heritage organisations sometimes employ in house interpreters who develop an interpretive plan for the entire site or for smaller areas within the site. Some organisations employ interpretation consultants from outside who contribute to the planning with their external perspectives. The job might also involve coordinating and supervising the work of the involved experts, integrating the goals

set by the management and project funders, facilitating participatory planning processes from stakeholders.

- **Interpretive Copywriters**

Copywriters are the professionals who are competent in writing the texts of interpretive products (way-signs, leaflets, booklets, panels, captions, self-guided trails, exhibitions). They ensure that supporting infrastructures such as trails, visitor centres, museum buildings etc. fit to the interpretive narrative and serve as a suitable context for interpretive learning opportunities.

1.3 Competence oriented learning and training

The InHerit approach is the result of a project that explored the possibilities and the added value of transferring the professional profile of adult educators into a (set of) professional profiles of heritage interpreters. This way the field of heritage education and the field of adult lifelong learning may be linked in two ways. First of all the training of people working in the heritage sector may be seen as a process of adult education; secondly the work of heritage interpreters may also be perceived as a process of facilitating adult lifelong learning among visitors. It is important though to be aware of the fact that the first process (that of the heritage staff) is an intentional process of professional learning, while the processes of learning visitors may engage in often are far less intentional and may be regarded as highly informal.

InHerit focuses on a competence profile of the targeted interpreters and a competence oriented approach because, in view of Europe 2020, professional development is due to be presented (and recognized) in terms of validated competence development.

The InHerit team has defined areas of competences which are relevant for the professional field as a whole.



Core competence areas are: research, planning, delivery by media and personal delivery. Additional generic competence areas are: evaluation, publicity & promotion, management and training. In each area the competences are described according to context and qualification level. These levels go along with the descriptors in the European Qualifications Framework (EQF). The profiles allow those who develop or offer training and education, to conceive and organise their course as a competence oriented course and present the learning outcomes in terms of competence development. It will also help relate the certificates or qualifications in heritage interpretation to national qualification frameworks and to the EQF. The specifics of the professional profiles may be found on the Inherit website: www.interpretingheritage.eu

In order to clarify the practical implications of a competence oriented approach to training and learning, we briefly summarise a few of the key features of a competence oriented approach.

Create meaningful contexts

For learning to take place, one should create or look for meaningful contexts in which learners will experience the relevance and the meaning of the competences to be acquired in a natural way. For heritage interpreters these situations will have to be the contexts in which professional heritage interpreters work.

“Be meaningful—the info you present must have a context, so the audience can understand it in relation to something they already know (this fosters an intellectual connection)”. Sam Ham (1992)

Make room for initiative and creativity

In order to acquire competence(s), give the learners room to take initiatives. It is a vital condition since competence implies taking initiatives, being creative, seeking to fulfil one's own ambitions. Competences are developed by the learners;

facilitate this process as a trainer with your suggestions, feedback and, where needed, your input.

Promote constructive learning

The philosophy of competence based education has its roots in the social constructivism that pervades our views on learning these days. Learning is conceived as a process of constructing one's own knowledge in interaction with one's environment, rather than as a process of absorbing the knowledge others try to transmit. Heritage interpretation as such may be considered an act of constructive knowledge production. The learner actively creates an interpretation.

Active learning in a realistic situation in which you have a distinct and valuable role, makes the learning process a worthwhile event with personal results that will prove to be useful in many other contexts. The process which leads to competence acquisition involves five basic elements: motivation, room for initiative, action and reflection.

Incorporate cooperative, interactive learning

The basic idea behind competence based education is to help learners develop and construct their own knowledge and seek ways to make optimal use of other people's competences in their own learning itinerary. This is what social constructivism is about. Co-operation and interaction are both domains of learning and vehicles of learning. In the case of heritage interpreters the others may include colleagues, peer learners, trainers, but also visitors/members of the target group.

Facilitate discovery learning

Open learning processes require learning that may be characterized as active discovery as opposed to receptive learning. This does not imply that learning content should not be made available and accessible. It means that the way of acquiring this knowledge or these competences cannot be just a process of providing information, but should always be embedded in a discovery based approach.

Include reflective learning

Competence based learning also requires, apart from a



focus on the key competences, an emphasis on the learning processes as such. By reflecting on one's own needs, motivation, approach, progress, results etc., one develops learning competences/strategies that may be considered meta-competences.

Make it personal

In the competence oriented theories, learning is conceived as a process of constructing one's own personal knowledge and competences. Information, knowledge and strategies only become meaningful for a person if they become an integral part of his/her own personal body of knowledge and competences. In education this implies that learners need to be able to identify with the contexts, the people, the situations and interests which are included in the learning domains involved.

“Be personal—Connect the info to something the audience cares about, not just knows about (this fosters an emotional connection). Interpretive techniques are: examples, comparisons, analogies, metaphors and similes.” Sam Ham (1992).

1.4 Content outline of this guidelines document

The InHerit guidelines provide suggestions for and show ways how to develop and organise a competence oriented in-service training course for heritage interpreters. The communication process of interpretation (the profession, the techniques and approaches) is based on a mix of principles from several other professions like journalism, marketing, psychology, non-formal and adult education, recreation and tourism planning/principles and media planning/design principles. The InHerit team also uses the principles of competence based learning to help participants (trainees and visitors) gain an understanding of, and affinity for the natural and cultural world. Consecutively, this document will lead the reader through various steps of preparation needed in order

to organise and deliver a training event for professionals and volunteers who wish to develop or upgrade interpretative competences to be applied in their work as heritage staff.

In these guidelines you will find the following information to plan your training:

- A brief introduction in key features of heritage interpretation
- Identifying the general needs for the course
- Deriving and formulating adequate aims & goals of the training event
- The context, the setting and logistics of the training event
- Providing realistic tasks and assignments to participants
- Promoting interaction and dialogue
- Assessing demonstrations of competence
- The issue of validation of learning outcomes

Several training materials are available on the project website: www.interpretingheritage.eu



2. A brief introduction in key features of heritage interpretation

‘Interpretation is an educational activity which aims to reveal meanings and relationships through the use of original objects, by first-hand experience, and by illustrative media, rather than simply to communicate factual information.’ Tilden (1957)

2.1 What is heritage interpretation?

Heritage interpretation is a systematic approach to non-formal education, specialised in communicating significant ideas about a place or a phenomenon to the public. It establishes cognitive and emotional links between visitors and what they can discover at a nature reserve, a historic site or a museum. It reveals deeper meanings, relationships and insights by first-hand experience and by illustrative media, rather than by simple communication of factual information.

Heritage interpretation can be defined as a non-formal approach to place-based learning for heritage site visitors. To further clarify the concept it is helpful to mention a few key aspects of heritage interpretation and how it brings heritage closer to people:

- Visitors should normally not perceive interpretation as an educational activity but as an interesting and enjoyable service that enhances their heritage experience. Nevertheless, heritage interpretation is a ‘structured approach to facilitate (often informal) learning processes’. As such it may be considered an educative activity.
- Interpretation leads from the specifics of a site or collection towards more universal ideas, i.e. it focuses on site-specific phenomena and facts and reveals the wider and deeper

meanings by embedding the specifics in meaningful contexts.

- Interpretation specialises in motivating non-captive target audiences by addressing their needs, by raising expectations and fulfilling them. Interpretation also tries to actively involve audiences by relating the content to their personal knowledge, interests, feelings and values and by encouraging discovery, engaging senses and reflection.

Many professionals in the heritage sector are aware of the power of interpretive techniques and personal meaning making in catching the attention of the visitors and engaging them in a learning process.

“Interpretation is a mission-based approach to communication aimed at provoking in audiences the discovery of personal meaning and the forging of personal connections with things, places, people and concepts.” (Sam Ham 2012)

Ham (1992) has described four qualities that help make interpretive programmes successful:

1. Interpretation is Thematic
2. Interpretation is Organised
3. Interpretation is Relevant
4. Interpretation is Enjoyable.

2.1.1 Interpretation is Thematic

All interpretation should address some main point or theme, ‘the big picture’ of what is important about the park, historic site or museum the visitor is in. A theme helps the visitors to make sense of what they are listening to, or reading, and to remember it. A theme binds facts, figures and stories together. It helps an audience to remember the importance of the information given. The theme is different from the topic of your programme—the topic is merely the subject,



whereas the theme expresses the main idea or statement of the programme. It includes a message; it triggers an interest and evokes curiosity.

Examples of topics	Examples of themes
Plants	The forces that shape the land shape the environment
Competition between plants	Insects deceive their predators with a variety of strategies
Historical Relevance	Aboriginal people changed Australia's environment
Changes in time	Wildlife is vital to the health of forests
Geology	The important role of the mosquito in nature

An interpretive programme or activity wants to make a point. And when the programme or activity is over, if someone were to ask the audience what it was about, the audience should be able to answer that question in a single sentence. In brief: What makes a strong theme?

- It inspires
- It is clearly connected to a site (or phenomenon)
- It is specific to the site (nowhere else)
- It is connected to the present
- It shows how your subject relates to people and universal concerns
- It includes a story line, a sense of drama
- It introduces a way of thinking and feeling

2.1.2 Interpretation is organised

Audiences visit sites for various reasons. They are there to have fun and learn something new, but they are there voluntarily. An interpretative programme uses a simple outline - introduction, body, and conclusion. The audience must find it easy to follow and understand and remember what is told.

A short introduction should be given in every activity. It serves a couple of important purposes. Introductions should capture the audience's attention, clarify the theme, and then quickly tell them what they're going to see and hear about in your programme. Some types of formal programmes such as hikes, trail rides and river trips should also include the necessary safety information as well as logistical concerns (how long the activity lasts, where you'll be going, what to bring, etc.).

The body of your programme is the activity itself in which the public will be actively engaged/involved... And the body is the heart of the programme, which is used to develop the theme and present the information you've prepared in an interpretive way.

The conclusion allows you to quickly run through some of the highlights from the programme and most importantly, it reinforces the theme.

"Interpretation is a communication process, designed to reveal meanings and relationships of our cultural and natural heritage, through involvement with objects, artefacts, landscapes and sites."
(Interpretation Canada)

2.1.3 Interpretation is Relevant

Interpretation makes the experience relevant for your visitors. In preparing an activity/a product a number of questions need to be reflected upon:

- Why are this place and its resources relevant for these visitors? What do this place and its resources mean to these visitors on a variety of levels?
- Where do its features fit into the world of the visitors (besides being just a vacation spot)?
- Can anything be shown that visitors will remember once they return to their homes, which could be anywhere in



the world? For example: How can shrinking glaciers be discussed? How might glaciers be made relevant to them? How to get them understand what glaciers are & how they move? Specifically, what do glaciers tell about this area? More broadly, what do glaciers tell about the earth and its history? On a deeper level, who cares that there are glaciers here? What's so special about them? How are our actions as humans affecting glaciers? What does recycling have to do with glaciers? If you can't think of the answer, a little research and 'out-of-the-box-thinking' or 'thinking in new boxes' may help.

2.1.4 Interpretation is Enjoyable

"One of the key areas of knowledge that interpreters must have to be effective in their presentations is an understanding of how visitors learn and remember information in a recreational learning environment. A recreational learning experience is one in which the person has chosen to attend or participate in a programme for 'fun'. The 'learning' that occurs is viewed as fun as well. Anyone who has a hobby, such as coin collecting, model making, studying aspects of history, bird watching, etc. is involved with recreational learning. We learn because we want to, and the process of learning and discovery gives us pleasure." (<http://www.heritageinterp.com/>)

To take into account the needs of the public, interpreters seek to establish an experience that helps people to

- Enjoy the experience
- Enjoy the activities
- Enjoy the entertainment
- Enjoy good company
- Enjoy having done it
- Enjoy the learning

The audiences who participate in interpretive activities are voluntary and can leave if they are bored or not interested in the programme. Many things can make the experience more interesting and enjoyable for the audience. A simple smile

already may help. Other techniques include: using active verbs, using exaggeration to make a point (size, time scale, etc.), engaging people's senses, or focusing on a specific individual (real, or fictitious) in order to make a point. Storytelling is a powerful means of bringing the experience to life. Story-shaped information is more easily absorbed by our brains, so to speak. Offering content through narratives is considered to be beneficial to the learning process in many ways. It acts as a 'sense making tool', supports our imagination and capacity to memorise and contributes to identity development. This process is enhanced by two factors: the imaginative element and the emotional element of storytelling.

There Are Many Ways to Make Technical Information More Entertaining, according to Sam Ham (1992)

- ***Use Active Verbs***
- ***Show Cause-and-Effect***
- ***Link Science to Human History***
- ***Use a vehicle to make Your Topic More Interesting***
- ***Use an Overriding Analogy***
- ***Use a Contrived Situation***
- ***Use Personification***
- ***Focus on an Individual***

For more details on this, we refer to the InHerit Manual

2.2 How to introduce the concept of heritage interpretation

In a training event the concept of heritage interpretation may best be explored together. Most people attending an event on heritage interpretation are involved in work in heritage sites and often so for many years already. This implies that many of them do have previous experience and knowledge in interpretative work. That is why it is recommended to start a meeting with an inventory of these experiences. Often



this may be done as part of an icebreaker like activity at the start of the event, or otherwise, it may be an explicit part of the programme included to allow participants to tell about their experiences and why they think these experiences are relevant in the context of this training. For now it is sufficient to realize that by allowing people to speak up first, they will feel recognized and respected and therefore more motivated to listen to what will be explained later on. The concept of heritage interpretation thus will be better embedded in the shared concepts of the participants. By speaking about the similarities of experiences and about the differences and how they relate to the concept of heritage interpretation, the understanding of the concepts and the approach will grow.

A possible outline of the beginning of a training event.

Time table	Possible activities
0.00 h	Getting acquainted: people are asked to bring an object and to explain who they are and why they brought this object.
0.30 h	A brief explanation of the course theme and the course programme
0.45 h	Participants are invited to tell something about their experiences in the heritage sector and what they expect the course to bring to them
1.00 h	An introduction in the concept, the approach and the key features of heritage interpretation
1.30 h	Dialogue on the essentials of the approach and the possible added value
1.45 h	Break

3. Identifying the needs for the course

Now, after we have introduced and discussed the concept of heritage interpretation, the focus shifts to the actual purpose of this document, which is the development and delivery of a training event for heritage interpreters. In order to do that in a way that meets the needs of an audience of people working in the heritage sector, it is necessary to identify the needs of this target group. In the Inherit project this has been done in a generic way. In various countries and among various workers in the heritage sector needs have been identified. The conclusions reached made it clear that three areas of heritage interpretation were to be considered the most characteristic for the interpretative approach and at the same time could best be linked to particular groups of people working in the sector, either as professionals or as volunteers.

That is why the project members chose to focus on these three positions (Interpretative guide, site manager and copywriter). In the guidelines included in this document we therefore focus on these three professional groups.

3.1 Professional development needs

When giving a course, a workshop, or any other training event to a group of heritage staff, it is important to again check whether the needs of your specific group match the generic picture. It may be that the kinds of sites they represent, or the kinds of experiences they have, give cause to a more focused offer. That is why it is important to inquire about their professional background in order to allow you, as a trainer, to adapt to their needs. The professional profiles developed in the InHerit project may serve as reference systems to identify the competences already acquired and those not yet acquired as well as the levels of competence reached so far. Thus, participants may be allowed to get a



view of their own professional performance profile and their related professional development needs. If this approach in full is seen as too complicated within the format of the training programme, still the key elements of the professional profiles may be helpful to structure a conversation about needs.

3.2 Personal development needs

The training event to be organised will be competence oriented in its approach. This implies that the participants will be engaging in a process of learning by doing. Furthermore, it means that the participants will be doing the things they are supposed to do in their real work as well, but now in an interpretative way. The learning situation therefore has to be one that is perceived as recognisable and realistic. For participants in a course on interpretative work in the heritage sector this means that they will need to be brought in a setting in which interpretative work is required. Such a setting needs to include a site, an audience, required actions and tasks. The most common arrangement will be such that the participants serve as audience to each other. That is why we are not only interested in their professional development needs, but also in their needs as visitors to the site the course is organised in. Organisers have to think about the needs they assume their audiences will have and at the same time about ways to communicate with them in order to find out more about, or to check their needs. This needs assessment in a limited frame of a training event will have to be equally limited. A brief set of questions, an introduction ice breaker like event, or a small assignment on expectations about the course may serve this purpose.

3.3 The synthesis

The challenge for the trainer will be to translate the identified needs into an adaptive programme in which participants will find an optimal mix of what they wish to learn professionally and of what they experience in their capacity as a visitor.

Needs may best be met by distributing tasks and assignments among participants in such a way that they can each practice the professional competences they wish to focus on, and at the same time optimally enjoy the experience the setting offers them.

The synthesis mentioned in the heading of this section basically means that the trainers need to seek a synergy between a competence oriented approach to training and an interpretative approach of the participants in their role as visitors. By doing so, both aspects of the programme will benefit.

Programme part devoted to needs assessment and needs articulation

Time table	Possible activity
2.00 h	People are invited to do a mutual interview on what they would identify as the need they would like to be met in this course. Participants summarise the needs of the one they have interviewed in one or two sentences, which they write on a common flipchart. Where possible, a distinction is made between personal development needs and professional development needs.
2.40 h	Group dialogue on how the needs may be met, where they are similar and where they differ, and how professional/personal development needs and visitor/participant needs may be synthesized.
3.00 h	



4. Formulating learning goals in terms of competences

Heritage interpretation is not a formal learning situation/ activity, but it can be seen and approached as a form of informal learning and therefore learning principles may be used to prepare heritage interpretation activities and material. With heritage interpretation the aim is to motivate the public to appreciate and care about heritage. In the InHerit project a competence based approach to learning is chosen. This applies to the vocational training developed to train site-managers, copy writers and interpretative guides. For vocational training the aim to enhance the professional competences of the trainees is obvious. They will need to be prepared for actual performance in their positions and roles. The competence based approach, however, also applies to the audiences of these professionals. They may not visit sites to enhance their vocational competences, but the experience may well add to their generic competences for lifelong learning. The social constructivist ideas behind a competence based approach make it very suitable for non-formal adult learning.

4.1 Competence

A competence is a person's ability to perform a particular task or activity in a specified range of real world contexts.

According to this definition a competence is a holistic concept that comprises anything within a person which is needed to perform under real world conditions. Most importantly, it does not simply refer to 'a particular context', but to 'a range of real world contexts'.

Consequently, in order to specify a particular competence, one needs to describe:

- The range of real world contexts it refers to, and
- The task/action and the result that is to be achieved at an appropriate quality level.

The InHerit curriculum outlines for interpretative guides, site-managers and copywriters contain interpretive competences. The skills, attitudes and knowledge components are specified and so are the contexts in which the interpreters will have to perform.

The professional field of heritage interpretation is not yet widely formalised in terms of formal qualifications that are part of different National Qualification Systems.

The InHerit competence matrix offers a reference framework for the entire professional field of heritage interpretation which can be useful for different purposes and demands from within the professional field. You will find it on: www.interpretingheritage.eu

The profiles are also included in the InHerit manual.

4.2 Competence based learning

Competence based learning requires an approach that differs from the traditional approaches to teaching and learning. In heritage interpretation the focus is not on transferring knowledge; we stress the importance of rich learning environments that enable learners to engage in meaningful processes. Competence based learning is based on the idea that learners learn by experience and discovery. The idea is that adult learners need to be actively involved in the learning situation. They learn best in co-operation and interaction with others and with their environment. Thus they enable themselves to acquire and build knowledge, and check and cross-check their newly constructed ideas with those of others.



The EQF outlines an overarching framework set up in Europe to facilitate comparison of qualifications and qualifications levels in order to promote geographical and labour market mobility as well as lifelong learning. The core of the EQF consists of eight common European reference levels. The EQF levels are not described in terms of certificates and degrees but are defined by a set of descriptors indicating the learning outcomes relevant to qualifications at that level in any system of qualifications: 'knowledge', 'skills' and 'responsibility and autonomy

on track regarding theme, timing and learning goals outlined in the interpretive plan.

To help visitors with various and diverse backgrounds build in personal meanings and connections with the heritage resource.

To ensure that the interpretive presentation of a theme, despite inevitable simplifications for non-expert target audiences, is credible, appropriate and accurate.

Inherit distinguishes various core competence areas in the field of heritage interpretation:

- Research
- Conceptualisation & planning
- Personal delivery (e.g. roving interpretation, guiding, costumed live interpretation)
- Delivery by media (e.g. labels and panels, mechanical or digital interactives, audio-guides, smartphone apps, projections, for self-guided trails and exhibitions)

In addition to the areas mentioned, a number of competences may be distinguished that belong to the professional activities of heritage interpreters but are not typical for the approach of heritage interpretation, such as evaluation, promotion & advocacy, management and training.

Examples of personal delivery competences:

To explain complex topics and ideas connected to a site's main themes in simple words and images that are easily accessible for non-expert audiences.

To develop and make appropriate use of props and supporting media that illustrate the content.

To deliver an interpretive narrative in a flexible way that relates to the visitors' backgrounds while keeping

Possible programme element devoted to competences

Time table	Possible activities
3.00 h	The formulated competences are projected and linked to the needs identified so far.
3.15 h	The trainer explains briefly the relevance of a competence oriented approach within the training event as well as in working with visitors in heritage sites.
3.30 h	Break



5. Determining the context, the setting, and logistics of the training

The contexts as mentioned in the descriptions of the competence profile serve as sources from which to derive ideas on the kinds of settings you would like the learning to take place. A guide will need to practice with a group of visitors; a site manager may need to practice with the director and support staff, a researcher with (re)sources and sites etc. A copywriter should be able to write texts for different kinds of media. If things may not be organised for real, then simulated conditions may be considered, or actual past experiences such as critical incidents, work stories, cases etc..

Example 1: A competence based assignment about Oud Poelgeest castle and its resident Boerhaave

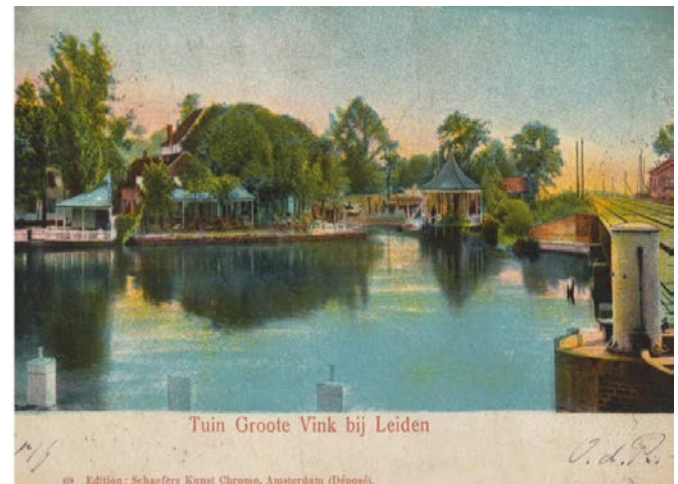


In a training event at Leiden University (The Netherlands) a group of heritage professionals walked to Oud Poelgeest castle in Oegstgeest which is now being used as a conference centre. The castle was built in 1668, probably by

the Haarlem architect Erasmus den Otter. In 1724 Herman Boerhaave (1668 - 1738), a Dutch botanist, chemist, Christian humanist and physician of European fame, bought the castle. He designed the garden for his large botanical collection that no longer fit in the Hortus Botanicus in Leiden. This location was selected because it would meet the demands of the heterogeneous group of heritage professionals who came from museums, historical sites, natural heritage sites and form intangible heritage contexts. The castle with its garden, its history of Boerhaave and his wide network of scientific fields and relations, offer a wide variety of elements to link to in an interpretative tour with a diverse group of participants. In the training the participating heritage professionals were asked to develop a meaningful activity at the location for a group of adults around this castle and its famous resident Boerhaave:

- Determine an interesting theme for an identified audience;
- Create a design of a heritage interpretation activity;
- Think about how the activity might be carried out;
- Indicate what choices and decisions you have to make.

Example 2: A competence based activity at a once beautiful site



De Grootte Vink a long time ago



De Grootte Vink in 2011

In a training for teachers and heritage professionals (in 2011), PLATO (Leiden University) used the story of Leiden based author F.B. Hotz 'The footnote' which describes the events from his own perspective and understanding while growing up, related to a train accident close to Leiden in 1926. The train derailed near a – during those days - beautiful touristic place. Currently there is not much left of its beauty, as can be seen in the picture above.

Because it was the first time an electric train used this railway, the train had many famous people on board, among which was an actors' couple D. Jessurum Lobo and Greta Lobo-Braakensiek who both died in the train accident, and Hotz's aunt, who got injured.

This site was chosen because of its humble looks, so the participants would not think that heritage interpretation is only possible if the site consists of beautiful buildings or objects. Furthermore, the mix of the location and its train accident story opened up to possibilities of reflecting upon the history of the railway, the technical developments, the aspect of concepts of leisure throughout the years, the arts and culture dimension of the book, and of the theatre players paying a part in the story.

To develop competences in competence based heritage interpretation, the participants in the training were asked to:

1. develop a scenario for a play based on the train accident;
2. develop a re-make plan for the area;
3. develop a proposal for a monument for the victims of the train accident linked to the theme 'Casualties of the human search for technological innovation'.



6. Providing realistic tasks and assignments to participants

As already stated in chapter 3, in your training you will need to acknowledge the background and the already acquired competences of participants. In the professional development of any professional group we see trends towards lifelong learning. The model of attending an initial course and live your professional life happily ever after has long been left behind.

In order to make the participants start the learning process it is important make sure they know what is expected, what the purpose is, what things need to be achieved etc. Tasks and assignments serve this purpose. They motivate the learner to give course to the actions and to perform in a task oriented way, trying to achieve the intended outcomes/products/services. The tasks and assignments to be given should be key tasks at the level heritage interpreters should be able to perform (organise an exhibition; address a group, convince a manager, create a flyer, set up a trail etc.).



Example of an assignment for copy writers

Within the InHerit project we organised a pilot course in Eltham Palace in London, The palace is well known for its Art Deco style and interior. Participants were asked to write an information panel about objects of their choice, taking into account the following guidelines:

Think about what will interest your readers. Make sure the opening sentence of each piece of text says something interesting.

Help your audience relate to your subject. Think about ways to connect what you're writing about with your audience's experiences, interests and culture.

Get your points across by referring to things people can see, touch, smell or hear.

Where appropriate, suggest things for them to do, look for, discuss, or think about. Vary the way you do this - too many bald commands can sound abrupt.

Vary the length of your sentences. Aim for an average of ten to twenty words per sentence, and use short paragraphs – fewer than 50 words. Shorter sentences and shorter paragraphs make text easier to read.

Simple, short words make your text more accessible. If you need to include technical terms, put them in italics and explain them the first time you use them.

Use the expressions and language you'd use if you were talking to someone.

'We bought this vase in 1979' rather than 'The Council purchased the vase in 1979'.

Involve your readers by addressing them directly as 'you'. If you need to refer to your organisation, try using 'we'. This gives your writing a more personal feel.



Use pictures, diagrams maps or graphs to get your messages across. Make picture captions work hard! Use them to reinforce your message, and add to what visitors can see in the picture: don't just describe it.

Use active rather than passive verbs where possible. For example, try: 'we can use evidence from below ground to re-construct the past' rather than 'Evidence from below ground can be used to reconstruct the past'.

Interpretation should provoke, so come up with a catchy headline which relates to your theme, don't simply state your topic. Grab people's attention!

Write in plain language

Mark Twain is said to have written: 'I would have written you a shorter letter, but I didn't have the time'. Being concise takes time and effort. Keep it short and simple!

Always use a short word rather than a longer word.

e.g. use 'buy', not 'purchase'; 'go', not 'proceed'

Use action verbs to bring your writing to life

Crunch, snap, crack, shake, grab, soar, dive, bounce, wobble and so on...

Use words relevant to the reader, everyday language – not jargon

Original text: 'This site has been clear-felled to facilitate moorland regeneration but is next to a Low Impact Silvicultural System site where the aim is to retain some canopy cover at all times and designated trees will be allowed to reach biological maturity.'

Instead, write: 'We have cut down all the trees here to help the heather moorland to return. In the next-door woodland we will remove some trees but allow others to grow big and old.'

Break up text paragraphs by providing attention-getting sub-headings. These allow the readers to scan the text to find the bits they are interested in.

Use metaphors and comparisons

These help people relate what you're telling them to something else they know about.

First section James Carter; remainder Steven Richards-Price

So participants in the training event will have to be able to identify with a realistic task in a setting they can recognize. The more the trainers succeed in creating this realistic setting with equally realistic tasks, the better the participants will be able to learn and, what is more, the better they will be able to transfer what they have learned to their own professional context.

Creating a rich learning environment that includes dilemmas and choices is important to help the participant develop an interest and to feel motivated to discover what there is to be known, to be learned, or to be acquired about a phenomenon, a building, or an object.

Creating a rich learning environment is needed for competence oriented learning to take place. To accomplish that it is necessary that the learner experiences the urge to solve things, to get to know things, to be accurate etc. That is why on top of a realistic setting there is also a need for relevant and urgent professional opportunities, challenges, dilemmas, choices, deadlines, expectations etc.

Because the trainees are taking part in the training as both participants and as visitors, the way to approach the trainees apart from being competence oriented, also has to meet the criteria of heritage interpretation itself.

It has to provoke curiosity, attention and interest of the



participants. In planning the training course the trainer has to consider the answer to the question: Why would a participant want to know this information?

The trainer needs to **reveal** the ending or answer of the communication process through a unique or unusual perspective or viewpoint. Save the answer to the last. The revelation tells the participants why the message was important for them, or how they can benefit from the information that was interpreted for, with, or to them.

The trainers must find a way to **relate** the message to the everyday (professional and private) lives of the participants/visitors.

Possible activities during and after the excursion and the work in groups

Time table	Possible activities
4.30 h	Brief introduction to an excursion to a site; subgroups of participants get an assignment to organise an interpretative tour, or write interpretative panels to a well identified target group of visitors (a group of colleagues, a diverse audience, de group of parents and children,..)
5.30 h	Upon return the participants elaborate their work on flipchart.
6.00 h	The subgroups exchange their work and discuss the merits of it
6.45 h	Break

7. Promoting interaction and dialogue

The learners now are supposed to have assumed the tasks already and be aware of the context and the challenges and opportunities that it includes. This is the moment that questions will arise for more information, for further inquiries, so this is the moment the trainer may provide inputs for a focused audience. Their need to absorb, digest, enrich and apply the knowledge (in the widest sense of the word, so including theories, beliefs, values, skills and attitudes) will create a need among them to discuss and check their understanding of the situation. Inputs and dialogues are needed to help participants to digest the content and to make the ideas applicable in their practical (simulated, or real) setting/case.

Heritage interpretation includes a variety of competence areas and related contents. Within the competence oriented approach of the InHerit project, this may be the moment to present instructions needed for better understanding and application of particular competences (e.g. how to tell a story, how to write proper documentation, how to develop a good strategic plan etc.)

In this part of your training you should organise dialogues in which participants give constructive feedback on each other's products/ideas. Make sure the atmosphere is safe, that mistakes are allowed.

When organising (reflective) dialogues in your training, you can use the following rules:

- Ask informative questions
- Ask inquisitive questions (how, why, etc.)
- Add your own experiences
- Accept the information given
- Give new information



- Comment constructively/affirmatively/positively
- Try to explain your assumptions/motives
- Analyse differences and similarities
- Formulate new hypotheses
- Make an inventory of shared ideas and optional ideas.

By approaching the dialogues and discussions in this way, the trainer demonstrates how dialogues are made worthwhile. That way the participants will be stimulated to do the same. The constructive dialogues that will be the result of this, add to the quality of the learning process by adding variety and by adding a personalized experiential dimension.

Promoting interactions and dialogue is not a distinct element in the programme, it is rather an element that pops up in each part of the programme. Already in the way participants got acquainted, in their needs assessment interviews, in the way they did the excursion in subgroups and in the way they elaborated their ideas afterwards, we see the ever returning interactions and dialogues that support the professional learning process and the process of informal learning they go through as visitors.

8. Assessing demonstrations of competence

The proof of the pudding is in the eating, and this also applies to competences. Competences cannot be assessed through paper and pencil or similar assessment approaches, competences per definition must be demonstrated in action in a realistic context. These contexts will be quite similar but not the same as the ones used in the training setting. Students/learners now will need to be given the opportunity to show what they can do with what they have experienced, done and learned. And what is more, they will also need to be given the opportunity to indicate what they have learned about their own learning style/strategies.

Example of an assignment for guides

Now that you have visited the site, and developed ideas on how you might lead visitors through that site, we would like you to demonstrate some elements of how you would do that. Consecutive demonstrations might be focusing on the following events of the visit :

- Show how you would welcome the group you have in mind;
- Tell a brief narrative that would support your tour;
- Ask the questions you would like to ask your audience;
- Use some objects to enrich your presentation.

Example of an assignment for copy writers

- Show us a panel you wrote;
- What other written (or other) materials would you use to enrich the interpretative nature of the visit;
- Explain why you think your approach facilitates interpretation



8.1 Providing feedback and suggestions for further actions

A competence oriented learning process is an ongoing process not necessarily limited to the course duration, so competence oriented learning should always include suggestions for further development of competence and ways to achieve this.

Feedback can be provided by:

- participants (peer feedback)
- the trainer
- colleagues within the organisation of the participant (360 degrees feedback)
- colleagues/professionals from the heritage field

Self-evaluation is a process of learning which is highly interactive and reflective. From various sources and from various perspectives all the people involved seek feedback. In this way, they establish a clear and inter-subjective understanding of both the context and the impact of their own role in the process. By gathering data and by analysing them, people provide themselves with feedback on their own performance and progress.

Peer feedback is a strong mechanism to help people learn from experience. This can be organised within the training or by using '360 degrees feedback' provided by those in different positions and at different levels in the organization in which the participants work. This can include feedback from superiors, subordinates and people in similar positions. The 360 degrees feedback provides insights into the dynamics of one's work within the structure of the organization. Reflection relates not only to one's work with colleagues and superior or subordinate staff, but also to multiple interactions with students, clients, stakeholders, sponsors, funding agencies and the community etc. Reflective practice involves a wide variety of people. By means of interaction and shared analyses of the learning process, the context, effects and

impact of the feedback are highlighted and learning among all parties concerned is promoted.

SELF-ASSESSMENT

- Reflective questions might be questions like:
- What did I learn?
- What helped me most in acquiring this competence?
- How does the invested effort compare to the result?
- How could I have gained more from it?
- What would be a rewarding next move?

PEER ASSESSMENT

- Give one compliment and one suggestion.
- Mention one thing you would have done if you had been your peer and one thing your peer has done and which you consider doing next time.
- Choose a person with whom you would make a good team in this context and explain why you think you would.

Possible evaluation

Time table	Possible activities
7.00 h	Individual evaluation using some of the questions presented above under the heading self-assessment, for instance: <ul style="list-style-type: none"> - What did I learn? - What helped me most in acquiring this competence? - What would be a rewarding next move?
7.15 h	A session in subgroups of maximum 4 participants talking about the question: <p>Mention one thing you would have done if you had been your peer and one thing your peer has done and which you consider doing next time.</p>
7.45 h	



9. The issue of validation of learning outcomes

A next step in the professional development of heritage interpreters through ‘recognized competence oriented in-service training’ is the validation of learning outcomes. “Learning outcomes are statements of what a learner is expected to know, understand and/or be able to demonstrate after the completion of a process of learning” (ECTS - EU, 2004). Learning outcomes should provide comparable information about what learners have actually learned.

Using a whole validation process for this training would be too much, but knowing about it is valuable. Therefore we just introduce the characteristics of this process.

There are four phases in a validation process: identification, documentation, assessment and certification. This doesn't mean that all validation includes all phases; this depends on the purpose of the validation and the personal needs of the learner. Some participants are not interested in a formal qualification. For them validation can be limited to identification and documentation. Others may need a certificate as a confirmation of their qualification for the job they presently have, for an envisaged career change or simply for their portfolio, to be used for future job opportunities.

The CEDEFOP 2009 guidelines state that validation is “the confirmation by a competent body that learning outcomes (knowledge, skills and/or competences) acquired by an individual in a formal, non-formal or informal setting have been assessed against predefined criteria and are compliant with the requirements of a validation standard. Validation typically leads to certification”.¹

Validation is a corner stone in the concept of lifelong learning. If we agree that learning is not limited to the classroom (formal education) but ‘takes place everywhere’ (work place, social & cultural sector, volunteer work etc.), then we should also agree to install mechanisms to recognize this learning.

9.1 Identification

Identification in this context means to identify the outcomes of the learning process, to identify the competences acquired or developed at the course. Ideally an in-service course on heritage interpretation should be based on the development of a pre-defined set of competences. The InHerit ‘interpretation competence profile’ (See: <http://www.interpretingheritage.eu/en/outcomes/key-competences-hi-staff>) offers the reference framework for these competences in terms of activities, occupational context, level ... These elements should be translated into learning outcomes, not just based on the objectives of the course but also on the needs of the target group. A dialogue between the course organiser or trainer and the participant should result in a learning agreement containing the envisaged learning outcomes tailored to the participant.

9.2 Documentation

Documentation means evidencing individual learning outcomes, proving individual competence development. The documentation of learning outcomes can be organised as an examination or a simulation, the production of a product, a performance, through written documents, a demonstration etc.

9.3 Assessment

Assessment is a referencing process, the process to compare the individual learning outcomes to specific reference levels or standards. These can be educational/training or occupational standards, preferably not based on teaching input factors (e.g. time & curriculum) but on output factors (learning outcomes):

- Occupational standards: following the logic of employment, these standards focus on what people need to do, how they do it and how well they do it in an occupational context.

¹ CEDEFOP Glossary of Key Terms, <http://www.cedefop.europa.eu/>



- Education/training standards: following the logic of education and training, these standards focus on what people need to learn, how they learn it and how the quality and content of the learning are assessed. They are formulated in terms of input: subject, syllabus, teaching methods, process and assessment.

Assessment can be based on external evaluation, self-assessment, peer assessment or a combination of these processes. It can be a combination of written tests, practical exercises, demonstrations, interviews ...

The credibility of the assessment is crucial: “The extent to which validation process outcomes can be transferred and exchanged very much depends on the extent to which the resulting document, portfolio, certificate or qualification is trusted by external parties and stakeholders.”²

9.4 Certification

Assessment is followed by certification: an official confirmation of the achievement of learning outcomes. “Certification means that a competent and legitimised body confirms that an individual is in possession of the relevant skills, abilities and competences and that these have been assessed in accordance with stipulated standards. This can be an official qualifications standard, an occupational standard or an approved education programme or curriculum.”

This process should be managed by a credible authority or organization. “The value or currency of the certificate depends on the legitimacy of the awarding body.” It also needs to be linked to the National Qualifications Framework (national regulations for recognition of learning, NQF) and as such to the European Qualification Framework (EQF).³

A National Qualification Framework (NQF) is a ‘level framework’ issued by a national structure (organisation)

for recognition and mapping of qualifications. These can be education/formal training qualifications or professional/occupational qualifications. In order to get professional qualifications recognized, it is necessary to define the profession (occupation) and to define the professional context and the competences needed. A commission consisting of inter-professional partners and educational partners will then be asked to ‘assess’ the qualification and will then ‘level’ it (attribute a level in the NQF). This process leads to recognition (by the authorities) and registration in the national qualifications database.

Integration of validation of learning outcomes into the national qualifications system requires that qualifications are opened up to a broader set of learning pathways and that validation arrangements are established as an accepted and normal route to a certificate or qualification. This requires a shift to learning outcomes based standards in NQFs and less importance of input specifications (learning forms and approaches).

9.5 LEVEL5

In the InHerit project pilot courses, the trainers also introduced a validation system called LEVEL5. The LEVEL5 developers assume that learning outcomes can be displayed by means of three components or dimensions:

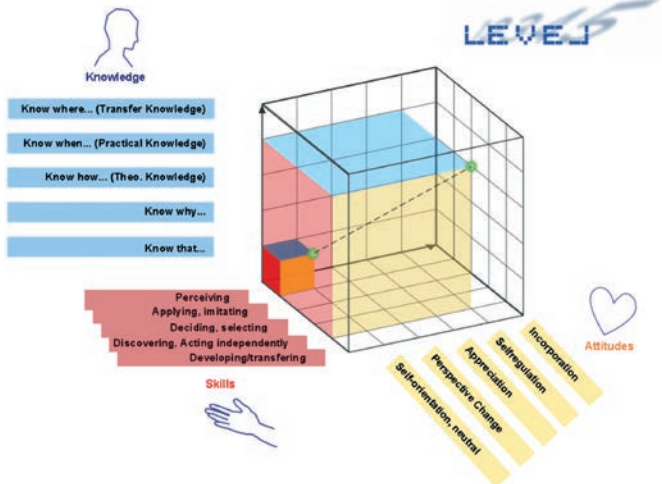
- the knowledge component
- the activity component
- the affective component.

This third dimension is often neglected in the evaluation of learning outcomes. However, in most informal learning projects, this affective dimension is of major importance. For the evaluation process, the competence levels of an individual are set at five levels for each dimension, which gave rise to the name LEVEL5. Hence, the core of the system is a three-dimensional visualisation system: the LEVEL5 cube.⁴

² European Guidelines for validating non-formal and informal learning, CEDEFOP 2014

³ Ibid.

⁴ <http://www.reveal-eu.org/>



The LEVEL5 approach is based on a five-step procedure, starting with a description of the learning project and ending with the evidencing of learning outcomes and the validation of learners and learning projects.

Fig.1: The LEVEL5 cube

Fig.2: LEVEL5 cyclic validation approach





1. Learning project description: the learning project is described in a predefined template.
2. Selecting topics: learning topics are chosen from the competence profile or the course objectives. Topics can be further explored at an in-depth level and can be tailored specifically for an individual learner.
3. Establishing an individualised reference system, developed on the basis of the three dimensions (cognitive, activity related and affective) for the five competence levels.
4. Assessment concepts (self-, external and mixed assessment) and methods should be chosen according to the context and objectives.
5. Rating/documenting/visualising (online documentation system). After the assessment, the values from the competence levels 1 to 5 are recorded in the reference system and displayed as a LEVEL5 cube. The ratings are explained and documented and, if applicable, documented in a certificate. Results of learners and project characteristics are recorded internally.

Learners' certificates can be automatically generated (as editable PDF). Considering the large variety of training offers, contexts, target groups and activities in the adult education sector, one cannot expect a 'perfect' validation system in informal learning contexts to be developed from 'off the shelf'. Therefore, LEVEL5 is based on action theory principles and works with a rather cyclic procedure: the user always has the opportunity to modify some elements of the validation system during the assessment and evaluation processes.

Time table	Possible activities
7.45 h	Brief explanation of the relevance and potential of systematic validation of professional competences.
7.55 h	Handing out information on validation as included in this guidelines document as suggestion for further reading
8.00 h	Closure



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- www.heriq.org
- <http://www.cedefop.europa.eu/>
- <http://www.reveal-eu.org/>

Annex 1: Integral programme

Time table	Introduction
0.00 h	Getting acquainted: people are asked to bring an object and to explain who they are and why they brought this object. A brief explanation of the course theme and the course programme
0.30 h	Participants are invited to tell something about their experiences in the heritage sector and what they expect the course to bring to them
0.45 h	An introduction in the concept, the approach and the key features of heritage interpretation
1.00 h	Dialogue on the essentials of the approach and the possible added value
1.45 h	Break
Articulating needs and expectations	
2.00 h	People are invited to do a mutual interview on what they would identify as the need they would like to be met in this course. Participants summarise the needs of the one they have interviewed in one or two sentences, which they write on a common flipchart. Where possible, a distinction is made between personal development needs and professional development needs.
2.40 h	Group dialogue on how the needs may be met, where they are similar and where they differ, and how professional and personal development needs or visitor and participant needs may be synthesized.



Competence based approach	
3.00 h	The formulated competences are projected and linked to the needs identified so far.
3.15 h	The trainer explains briefly the relevance of a competence oriented approach within the training event as well as in working with visitors in heritage sites.
3.30 h	Break (lunch)
	Site based learning, an interpretative approach
4.30 h	Brief introduction to an excursion to a site; subgroups of participants get an assignment to organise an interpretative tour, or write interpretative panels to a well identified target group of visitors (a group of colleagues, a diverse audience, de group of parents and children,..)
5.30 h	Upon return, the participants elaborate their work on flipchart. The subgroups exchange their work and discuss the merits of it
6.45 h	Break
Site based learning, an interpretative approach	
7.00 h	Individual evaluation using some of the questions presented above under the heading self-assessment, for instance: What did I learn? What helped me most in acquiring this competence? What would be a rewarding next move?
7.15 h	A session in subgroups of maximum 4 participants talking about the question: Mention one thing you would have done if you had been your peer and one thing your peer has done and which you consider doing next time.

Possible activities	
7.45 h	Brief explanation of the relevance and potential of systematic validation of professional competences.
7.55 h	Handing out information on validation as included in this guidelines document as suggestion for further reading
8.00 h	Closure



Annex 2: Trainer's activities to support competence oriented learning

What should you, as a trainer, do to create conditions necessary to promote competence oriented learning?

Motivate

- consider having an intake interview;
- identify the needs of your learners;
- clarify goals and help learners to do that;
- make clear what you, as a learner, want to get out of it for yourself;
- approach learners respectfully;
- make learners become aware of the relevance of the learning experience;
- explain the range of experiential areas e.g. knowledge, attitudes, skills, traits, emotions;
- provide ways to allow learners to identify with people and contexts;
- always round up the learning sessions with a positive perspective.

Provide opportunities for learning

- serve as a guide, a knowledge broker;
- serve as a source of expertise/skills;
- serve as a model 'learner';
- create and organise practical experiential situations;
- provide tools for reflection and self-analysis;
- serve as a partner in conceptualising, in designing and in planning activities;
- provide standards, benchmarks criteria, norms;
- provide expert suggestions;
- be both reflective and instructive.

Organise feedback

- give feedback on performance;
- organise multiple feedback from fellow students, teachers, parents, experts;
- analyse and discuss the quality of the performance;
- serve as a sparring partner in exploring options for further development;
- create opportunities for debate with peers and others;
- allow for differences of view and opinion;
- be supportive;
- listen, listen, listen;
- be action focused.

InHerit project partners

Landcommanderij Alden Biesen (coordinator) (BE)
Interpret Europe - European Association for Heritage Interpretation (DE)
Faculty of Humanities and Social Sciences, Univ. of Zagreb (HR)
Istituto Pangea Onlus (IT)
Malopolski Instytut Kultury (PL)
Platform Opleiding, Onderwijs en Organisatie (NL)
Association for Heritage Interpretation (UK)
English Heritage (UK)
Swedish Center for Nature Interpretation (SE)

Do you work in a park, an abbey, a monument, a museum ...? Are you a guide, a ranger, a manager, a PR person, an exhibition developer, a curator, a copy writer, an education officer ...? Are you interested in enhancing the experiences your visitors have at your site, in improving their connection with your site and its goals, in improving their learning ... ? Do you simply want to know more about interpretation? Then these guidelines and the other InHerit products may be useful for you, they are all downloadable for free in pdf and/or on-line readable via issuu.com.

Please visit www.interpretingheritage.eu



Project co-ordinator



Vlaanderen
verbeelding werkt