



# Intro to Professional Development in Heritage Interpretation

The brochure







## Introduction

This brochure offers an introduction to the outcomes and products of InHerit, a Grundtvig Multilateral project. Educationalists, heritage professionals and interpreters cooperated in this project, aiming at defining the competences and qualifications that mark the profession of heritage interpretation (HI) and at defining and supporting the path leading to professional development of heritage interpreters. InHerit wants to improve the learning experience of audiences visiting heritage sites and museums by developing the interpretation competences of all relevant professionals on site. The project targets managers, guides, media programmers ... in heritage organisations willing to invest in better interpretation, resulting in better connection with the audience. The project also wants to build staff capacity for delivering effective competence-oriented informal learning in inspiring heritage contexts.

As a start the project team has developed a 'heritage interpreter competence profile': a reference framework for competences in the professional field of heritage interpretation. A next step was the creation of a training curriculum outline and guidelines for competence oriented training. This approach was tested in two pilot courses and applied in national training days.

All this work has led to a series of support material for heritage professionals and HI course organisers. On the project website [www.interpretingheritage.eu](http://www.interpretingheritage.eu) you can find:

- The InHerit manual: Professional Development in Heritage Interpretation
- The InHerit brochure: Intro to Professional Development in Heritage Interpretation
- The Guidelines: Competence driven training for Heritage Interpretation
- The e-book: Digging Deeper - exploring the roots of heritage interpretation
- Many more texts, papers and training support documents.

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 your goals, in improving their learning ...? Do you simply want to know more about interpretation? Then please go to our website and consult the InHerit manuals and books. They are all downloadable for free in pdf and on-line readable via [issuu.com](http://issuu.com).

This brochure is a starter as an introduction to the full menu of documents you can find on the project website.

## Heritage Interpretation

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. It creates cognitive and emotional links 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.

In 1957 the journalist Freeman Tilden, on behalf of the US National Park Service, laid down some general principles and defined heritage interpretation as: an educational activity which aims to reveal meanings and relationships through the use of original objects, by firsthand experience and by illustrative media, rather than simply to communicate factual information<sup>1</sup>.

Collardyn and Bjornavold define heritage interpretation as a non-formal learning approach which means it consists of learning embedded in planned activities that are not explicitly

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<sup>1</sup> All references in this brochure to Tilden, F. : (1957) *Interpreting Our Heritage*. Chapel Hill: The University of North Carolina Press



designated as learning, but which contain an important learning element<sup>2</sup>.

It is clear that learning nowadays is no longer confined to schools and colleges. Learning happens everywhere. In this respect two educational trends are particularly relevant:

- Place-based education & learning, promoting learning that is rooted in what is local, the unique history, environment, culture, economy, literature and art of a particular place.
- Learning Cities & Regions: a trend to focus on a 'generative learning ecology & economy' by locating the learning in more informal, dynamic learning spaces such as work environments, communication media, religious centres, natural recreation spots, heritage and socio-cultural meeting places. Learning Cities stimulate the development of such learning spaces and build the connections between them as well.

Following these trends the InHerit team is convinced that natural and cultural heritage sites, monuments and museums offer the ideal context for visitors to learn and that interpretation offers ideal techniques to make this learning as meaningful as possible.

## Professional Development in 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 started with a research oriented academic background in one of the heritage related disciplines such as biology, archaeology, art etc. and they then learned 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 of interpretive products in heritage sites.

The concept of 'Lifelong Learning' makes it clear that one learns throughout life and that initial (formal) education and training only is not offering a solid enough basis for a successful career till retirement. The professional heritage sector has a special place in this story. Many educational disciplines are relevant for the heritage sector but only very few take up heritage as an application field in the initial training. Heritage only comes in, in conditions of specialisation, in-service training or 'on the job' training.



*Bad interpretation - crowded panel, Gotland, Sweden*

Therefore it is important for the sector to embrace 'competence oriented in-service training'. It is high time to focus on the specific qualifications of the professionals in the field of heritage interpretation: what do heritage interpreters offer and what qualifications do they need in order to offer it in a professional way?

<sup>2</sup> Colardyn, D. and Bjornavold, J. (2004) 'Validation of Formal, Non-Formal and Informal Learning: Policy and Practices in EU Member States.' *European Journal of Education* 39 (1), 69-89, 71



# Principles of heritage interpretation

## Tilden's six principles of interpretation

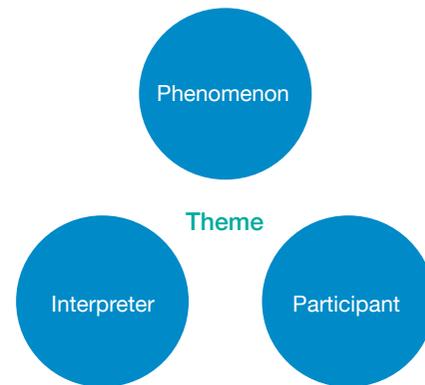
Freeman Tilden suggested six principles for quality heritage interpretation:

- I. Any interpretation that does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile.
- II. Information, as such, is not interpretation. Interpretation is revelation based upon information. But they are entirely different things. However, all interpretation includes information.
- III. Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.
- IV. The chief aim of interpretation is not instruction, but provocation.
- V. Interpretation should aim to present a whole rather than a part, and must address itself to the whole man rather than any phase.
- VI. Interpretation addressed to children (say, up to the age of twelve) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate program.

Tilden illustrates these principles through about 50 pages of his seminal work 'Interpreting Our Heritage'. Prominent keywords derived from them and till the present day still frequently used in multiple contexts are 'provoke' (fourth principle), 'relate' (first principle) and 'reveal' (second principle).

## The interpretive triangle

Several non-formal learning concepts had already been established in Europe, and it was necessary to point out why interpretation was needed. The idea was to focus on the specific combination of qualities of heritage interpretation in order to underline the significance of the interpretive approach, and to unite these qualities in a clear model. As a result, four basic qualities were distilled and attached to the so-called 'interpretive triangle'.



Qualities assigned to the four elements in the diagram include:

- to turn phenomena into experiences (phenomenon)
- to offer paths to deeper meaning (theme)
- to foster respect for all heritage (interpreter)
- to provoke resonance in participants (participant)<sup>3</sup>

## Offering paths to deeper meaning

Compared to other concepts of learning from first-hand experiences, the most significant characteristic of heritage interpretation is that it actively encourages participants to interpret their experience, i.e. to search for deeper meaning behind facts.<sup>4</sup>

<sup>3</sup> Ludwig, T. (2015) The Interpretive Guide. 2nd edn. Werleshausen: Bildungswerk interpretation, 11

<sup>4</sup> Larsen, D. L. (ed.) (2011) Meaningful Interpretation. 2nd edn. Fort Washington: Eastern National



As Tilden put it: Interpretation is the revelation of a larger truth that lies behind any statement of fact.

This is why ‘the theme’ is at the centre of the interpretive triangle. Theme statements help to express such truths or meanings. Themes need to be clearly distinguished from topics: while themes try to extract meaning, topics are more means of factual classification. For example:

	Natural heritage	Cultural heritage
Topic	Cycles	Industrial Revolution
Theme	This tree stump provides nourishment for new life.	This railway opened up a new world to the people of the village.

In different works on heritage interpretation (e.g. Sam Ham’s TORE approach: Thematic, Organised, Relevant, Enjoyable), the idea to focus heritage interpretation on themes is playing a major role.<sup>5</sup>

To be relevant for many different individuals, themes offered to participants are often based on universal concepts, i.e. ideas that concern almost all people.<sup>6</sup> In the two examples in the table, the ideas of renewal and liberation could be seen as universal concepts behind the two suggested theme statements. Themes are at the core of stories that can be derived from different phenomena, whether they are overgrown tree stumps or an old railway station.

Themes also help to organise and to remember information. Neuroscience found that people learn more through narratives than by facts.<sup>7</sup> People tend to think metaphorically, connecting facts to images that have meaning for them.<sup>8</sup> Moreover, themes (as well as metaphors or narratives)

activate frames which are connected to values. Values and frames suggest how heritage phenomena are perceived and whether and how individuals relate to them.<sup>9</sup>

## Turning phenomena into experiences

Perceiving a phenomenon first-hand does not necessarily result in an experience, if an experience is seen as an individual and emotional event, involving the whole person. For example: a panel text which does not touch a participant will hardly trigger such an experience, even if it is placed in front of a heritage object. In addition to the outer (sensory) experience, an inner (psychological) experience is required.

Several 20th century approaches to learning emphasise the value of involving such personal experiences. Inspired by the work of Lewin, Kolb developed an experiential learning model for adult education, completed by Honey and Mumford.

Even more relevant became experiential learning through the requirements set for the 21st century by UNESCO, listing experiential learning at the first place in its programme Teaching and Learning for a Sustainable Future.<sup>10</sup>

## Provoking resonance in participants

One key word in the current debate on education and learning is participation. Tilden wrote:

*It is another of those words to which interpretive activities have given a special significance. [...] Not only must it imply a physical act, it must also be something that the participant himself would regard as, for him, novel, special, and important.*

5 Ham, S. (2013) Interpretation – Making a difference on purpose. Golden: Fulcrum

6 Brown, D. (1991) Human Universals. New York: McGraw-Hill

7 Spitzer, M. (2009) Learning: The Human Brain and the School of Life. Amsterdam: Elsevier

8 Lakoff, G. and Johnson, M. (1980) Metaphors We Live by. Chicago: The University of Chicago Press

9 Holmes, T., Blackmore, E., Hawkins, R., and Wakeford, T. (2011) Common Cause Handbook. Machynlleth: Public Interest Research Centre

10 UNESCO – United Nations Educational, Scientific, and Cultural Organization (2016) Teaching and Learning for a Sustainable Future. [online]. Available from <[http://www.unesco.org/education/tlsf/mods/theme\\_d/mod20.html](http://www.unesco.org/education/tlsf/mods/theme_d/mod20.html)> [28 August 2016]



According to Tilden, participation means complete involvement into a learning experience which is especially reflected by the premises of relating all interpretation to the participant's world (first principle) and to address the whole person (fifth principle). Provoking resonance is an ambitious goal which requires particular skills if it will be transferred to all interpretive media, and which is still not achieved at many heritage sites.

In present-day Europe, the situation at most heritage sites is somehow different. Supported by more information, people are used to making individual decisions and to asking questions. This strongly influences the character of interpretive activities.

Furthermore, especially European heritage sites are rarely isolated from their social surroundings. Contemporary interpretive planning therefore needs to involve heritage stakeholders which are not just visitors, forming a receptive audience. They also appear as informed expert groups with controversial points of view. Local residents, who are not necessarily driven by conservation interests but partly deal with the particular heritage in their daily lives, also play an important role in the so-called heritage community. Although traditional interpretive skills form a good basis for communicative processes with all stakeholders, they need to be further developed in order to meet contemporary requirements.

If heritage interpretation intends to follow the calls of the UN and especially of UNESCO, if it intends to play a role in lifelong learning, it needs to focus on the empowerment of people to use heritage for reflecting on daily life issues.

## Heritage Interpretation and its role within adult education/lifelong learning in Europe

In the context of the EU's education policies and the wider field of educational science, heritage interpretation can be defined as a ***non-formal approach to facilitate place-based learning for visitors at heritage sites.***

Characteristics in comparison to other forms of education are:

- Visitors should normally not perceive interpretation as an educational activity but as an interesting and enjoyable visitor service that enhances their heritage experience. Nevertheless, heritage interpretation is a structured approach to facilitate learning processes.
- Interpretation works from the specifics of a site or collection towards more universal ideas, i.e. it focuses on site-specific phenomena and facts and facilitates wider and deeper understanding by embedding the specifics in meaningful contexts.
- Interpretation specialises in arousing intrinsic motivations of non-captive target audiences, through addressing their needs, through raising expectations and fulfilling them, through actively involving audiences in the learning process by relating the content to their knowledge, interests, feelings and values, encouraging discovery, engaging senses and reflection, and by offering opportunities to expand the horizon of understanding and to overcome stereotypes.

Visitors can come from the local neighbourhood area but they can also be international tourists from other continents with very different cultural backgrounds. By definition, audiences



addressed by heritage interpretation are non-captive, they are not there for professional reasons but during their leisure time. However, in terms of previous knowledge and motivation, the visitors can be very diverse, ranging from highly motivated persons who already are very passionate and knowledgeable about the topic to others who are dragged along with their parents, partners or friend to a site which they would otherwise not have visited.

Visitors may also have very different educational backgrounds. Sometimes sites deliberately reach out to immigrants or people with a lower education. There are visitors with a wide range of physical handicaps or with certain mental disabilities. And there are visitors of all age groups, from small children accompanying their parents to seniors in their high age.

As diverse as the visitors are, so diverse are the missions and priorities of the organizations owning or administering a site. In the context of nature protection, for example, the protection and conservation of the heritage assets often plays the dominant role. Here interpretation is often seen as an educational and communication tool in order to promote the idea of conservation and foster appreciation of the heritage and stewardship for environment and sustainability. In many cultural contexts there is a strong conservation mission as well, but other educational goals can also play an important role there, e.g. at memorials 'learning from history' or in regional/national museums 'fostering regional or national identity', 'reinforcing civic values', 'mutual understanding' etc.

For municipalities and regions 'fostering local economy' mainly through local income generated by tourism can be an important motivation to invest in heritage interpretation. This can be a very important driver, especially where other job opportunities are rare. In such cases interpreters are rather free in setting educational goals, as long as the interpretation enhances the visitor experience and encourages tourists to stay longer or to come back again. Through interpretation and education many organizations

also want to promote their own image and create awareness of their role in society.

All these missions and goals have one thing in common: learning. Especially for Europe (and EU policies and funding programmes) the inherent educational potential of heritage interpretation can be most important: to create learning opportunities that lead beyond the limited perspective of career development to a general education which broadens the citizens' horizons and fosters European values and goals.

In this context the power of professional interpretation comes from its low-threshold but high credibility as it does not seek to indoctrinate people. Last but not least, through facilitating learning beyond the familiar, heritage interpretation can contribute to innovative thinking outside the box. In this respect heritage interpretation contributes to the EU's 'Innovation Union' which is the first pillar of the 'Europe 2020 strategy for smart, sustainable and inclusive growth'.

## Quality in heritage interpretation

What does successful interpretation look like (or indeed sound, feel, smell or taste like)? And how do we know when we have experienced it? There are a number of general outcomes that we should be looking for when we evaluate the interpretation that we have provided at a natural/cultural heritage site:

- Visitors (of all ages and abilities) are able to access the interpretation:
  - Physically, this might be as straightforward as enabling visitors to get close enough to an interpretation panel (and to the feature being interpreted) to be able to read it. Or it might be about providing visual or auditory aids so that visitors with sensory disabilities can access the interpretation, for example audio descriptions of text on a panel, hearing loops, large print text.



Inaccessible interpretation panel, Matese Regional Park, Pangea Institute Archive

- Intellectually, this could mean a variety of things, from providing foreign language translations of text or additional interpretation to overcome cultural barriers, to providing information that matches the reading age and comprehension of expected audiences.



Clear bi-lingual panel, Abisko, Sweden

- Emotionally, this means visitors have a response to the interpretation. 'A response' can mean a variety of things, from an increase in knowledge about the subject of the interpretation, to an emotional response, to a change in behaviour.
- Visitors acquire an appreciation of the heritage, and a desire to protect it
- The heritage asset is not threatened by the interpretation



Graphic panels around Stonehenge, Wiltshire, UK. The panels are portable to avoid excessive wear in one place around the monument and to avoid a need to dig into the archaeologically rich ground.

- Visitors' health and safety is not compromised by the interpretation. This might mean that the placement of a panel is a safe distance from the edge of a drop, or on even terrain, or for a guided tour it might mean that the guide is fully aware of all potential risks in the location that they are taking a group to– from fixed risks such as drops or poisonous flora, to transient risks such as inclement weather conditions.
- The interpretation is in line with the business case for the project/site – in other words: it is delivered within constraints of budget and time and supports any increase in visitor numbers, income, etc., established as Key Performance Indicators (KPIs) for the project



The importance attached to these outcomes may vary from site to site and from stakeholder to stakeholder. However, they all require consideration for the delivery of successful interpretation. In addition, these outcomes should be found regardless of the type of site or the method of delivery for the interpretation.

### So how do we deliver these outcomes and produce successful interpretation?

There are a series of questions that can be asked to determine the success, or otherwise, of a new interpretation scheme – be it a new guided tour, a single panel, an exhibition or any interpretive intervention.

- Is a 'full' story available, including diverse perspectives and histories, not just the (current) accepted view?
- Is the content organised through themes? By structuring the content we make the key messages that we wish to communicate more readily accessible to our audiences.
- Is the content relevant to the audience(s) who will be accessing it? This requires both an understanding of the target audiences for the interpretation, and a willingness and an ability to action that knowledge to inform the content and presentation method used for the interpretation. In terms of audience understanding or insight, this should include demographic information such as age, gender, nationality and cultural background, but also the intellectual mindset of the audiences
- Is the interpretation sensitive to the heritage (both in what it says and how/where it says it)?
- Is the content engaging (relevant, provoking...)?
- Is the delivery method engaging? Many visitors are looking for a leisure activity, not a learning one, so we need to ensure we meet this need.
- Is the interpretation sustainable, both in terms of the environment and also financial return?

If the answer to these questions is yes, then successful interpretation has been created.



More than just a panel.

- a. Viewing tube augments the reality of the exposed remains of Chesters??? Roman Fort, Northumberland, UK
- b. Tactile elements add to the interest and understanding of the themes discussed in panels at Tintagel Castle, Cornwall, UK

Apart from these generic characteristics, a number of specific elements are needed to deliver a successful interpretation plan, guided tour or panel.



Using 'props' in Tyresta National Park, Sweden



Bad interpretation - crowded panel, Gotland, Sweden

## How do we make sure that our interpretation is successful?

In order to get evidence that our interpretive products are successful we should engage in an evaluation process.

- The first question to start an evaluation process is 'why'?



Good interpretation panel, Patagonia, Pangea Institute archive

Why do you, as an organiser, evaluate your interpretation activities/products?

- To know the quality of these products/activities: are they attractive, motivating, accessible, understandable ... in order to improve your actions, products
- To find out what people learned after taking part
- To find out what participants 'take home', what is the effect?
- To find the obstacles that hinder the achievement of certain outcomes
- .....
- The second question is: who do you address to get the right information? Possible stakeholders here are: the participants (visitors), the guide, the interpretive planner, other members of staff, a group of experts ...
- The how-question refers to ways or instruments to collect data. All evaluation comes down to asking questions to get the right information, in whatever format these questions are raised. In view of the non-formal learning aspect of most heritage interpretations contexts, evaluation involving the visitors themselves should be light, motivating and even fun. But still one has to ask the right questions. In



this respect it is important to think about what evidence (indicators) makes it clear whether the evaluated product or process is good enough. How do we know we do the right things and how do we know we do things right? A guide offering personal interpretation can, during the tour, easily probe through informal questions what the audience picks up or not. Possible evaluation techniques/tools are:

- Questionnaire (most obvious, quantifiable results but usually not popular, boring)
- Interview: individual or group with questions or storytelling
- Observation (of behaviour)
- Short question board with emoticons as answers
- A huge thermometer with good/bad indications and easy marking
- .....

## Reflections on the philosophy of heritage interpretation

In 1957 Freeman Tilden was, with “Interpreting our Heritage”, the first to publish a book on the philosophy of heritage interpretation. He drew from reflecting on a wealth of experiences with visitor services in US national parks and their attempts to interpret heritage. Occasionally he referred to American philosophers such as Ralph Waldo Emerson. Tilden saw the need to define this educational activity, but at the same time he felt very uncomfortable with a clear-cut definition. Therefore he made several alternative attempts to express what he found essential for heritage interpretation and complemented them with six fundamental principles. At the same time he made very clear that with this book he intended no finality.

Careful observation and meaningful reflection are the very heart of any true interpretive activity. Thus, heritage interpreters will also feel a desire to reflect by themselves on what heritage interpretation itself essentially means or could mean for those who visit heritage sites as well as for societies in plural democracies. Publications on this subject can serve as food for thought, they can provoke re-thinking our subject from different perspectives. But in the end each interpreter needs to reflect and probably re-consider from time to time his/her own understanding of interpretation. It is rather likely that this understanding evolves and changes over the years.

For heritage interpreters in Europe it can make sense to embed the philosophy of heritage interpretation in the contexts of philosophies and approaches to education that still play a vital role for this continent. How is heritage interpretation rooted in the movement of Enlightenment, and what did it inherit from the Romantics? What’s the relation to formal education and to progressive education? Does the



total break-down of Western civilisation, the devastation of Europe by the Nazi-regime, mean anything for the role of interpretation in a human society?

These questions are highly relevant for a deeper understanding of the role heritage interpretation has, or should have, in present day Europe. Some initial thoughts on these questions that are meant to provoke further reflection have been outlined in the e-book “Digging deeper - Exploring the roots of heritage interpretation” (on [www.interpretingheritage.eu](http://www.interpretingheritage.eu)). Inspired by these studies a chapter in the InHerit manual on the same website approaches this theme from a more phenomenological angle. It explores what happens when we experience natural and cultural heritage and how we make such experiences meaningful for the human individual and a human society.

Heritage interpretation, it seems from the perspective of these studies, offers very significant opportunities for education, especially for lifelong learning. Its potential for the greater society is largely underestimated by decision makers. Most interpreters would instantly agree to this statement. But, maybe, re-considering the philosophy of heritage could reveal that we ourselves underestimated the significance of heritage interpretation.

## A competence profile for the professional field of heritage interpretation

The basis for the creation of a curriculum for heritage interpreters is a competence profile, a reference framework for competences in the professional field of heritage interpretation (full profile in the InHerit manual on [www.interpretingheritage.eu](http://www.interpretingheritage.eu)). This field not only includes those who are employed or self-employed in the sector but also the important group of volunteers who are indispensable for many sites or museums.

InHerit focuses on a competence profile 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. This is particularly important in a ‘continuous professional development’ context and a non-formal learning context. So if we want professional development in heritage interpretation to be recognized, we will have to turn it into competence development. Therefore we start from a competence profile, proficiency levels and indicators. It also means that training courses must facilitate competence development, i.e. must be conceived as a competence driven learning activity. This goes along with the fact that heritage interpretation is an applied discipline and the professional training and education of heritage interpreters is best organised in concrete real world contexts.

## The matrix

For the purpose of this profile we define a competence as a person's ability to perform a particular task or activity in a specified range of real world contexts. In order to become competent an individual needs to acquire a particular combination of knowledge, skills and attitudes (KSA) which is required to perform in the specified context.

The team has defined areas of competences which are relevant for the professional field of heritage interpretation as a whole, covering all positions related to heritage interpretation. One can distinguish areas of core competences from additional generic competences which, however, are also crucial for the ability to develop and deliver heritage interpretation. Core competence areas in the field of heritage interpretation are: research, conceptualisation & planning, delivery by media and personal delivery. Additional generic competence areas are: evaluation, publicity & promotion, management and training. In practice an individual does not need to be competent in all these areas. It depends on the specific position an interpreter holds, which competence areas are relevant at what level, in order to be able to perform a range of assigned tasks.

In each area the competences are described according to context and qualification level. These levels go along with



EQF level	Research	Planning	Personal delivery	Media delivery	Evaluation	Promotion	Management	Training
3					G			
4	G	G	M	G	M	G	M	
5			G			M		
6	M	M		M				
7								
8								

the descriptors in the European Qualifications Framework (EQF). By referring to this framework, the competences a learner has gained in terms of the ability to perform in certain contexts will be transparent and comparable. Competence oriented qualifications and certificates in the field of heritage interpretation referring to this reference framework will then make it easier for employers to compare candidates in relation to their specific job description, regardless in which country the competence has been gained and how the qualification will be named. This competence profile also allows those who develop or offer heritage interpretation training and education to relate their certificates or qualifications to the European Qualification Framework (EQF). It can also be useful to assess an existing programme regarding possible gaps.

This matrix does not link competences to interpretive tasks or jobs/roles but links competences to qualification levels. These competences & levels are building blocks. A certain job/role in a certain context will require a combination of distinguished competences at different levels. This combination can differ according to context but the elements at the level of the building blocks are comparable.

E.g. interpretation staff acting as a local guide (G) is supposed to be competent to develop and deliver interpretation of medium complexity related to one main subject at one place to be delivered personally. He/she would need a combination

of competences in 6 areas at distinguished levels (light grey) as presented as an example in the matrix above. They are competent to autonomously develop simple interpretation programmes/products in the field of their main subject, and to follow guidance from an interpretive plan/master plan.

Media interpretation specialists (M) who are competent to develop and deliver interpretive products (and programmes) for various sites that are related to one major thematic field/ one major subject matter would need a different combination (e.g. dark grey).

Qualifications and certificates in the field of heritage interpretation referring to this reference framework will make it easier for employers to compare candidates in relation to their specific job description, regardless in which country the competence has been gained and how the qualification is called.

In a similar way the competence matrix can be useful for the development, or a review, of higher education programmes in the field of heritage interpretation.

Employers in the heritage interpretation field may find the InHerit competence matrix useful as a tool to devise a job profile for an employee position or a contractor. It can be helpful to determine which competences are required or appreciated, and which proficiency levels are needed.



This way the matrix has a universal value and offers a common ground for comparable job description and curriculum development, which is exactly the aim of the InHerit project and a starting point for further development of training material and courses.

## Competence oriented education & training

Competence based learning requires an approach to education that differs from the traditional approaches to teaching. In traditional education the focus is on transferring knowledge; in competence based education we stress the importance of powerful or rich learning environments that enable learners to engage in meaningful learning processes.

### Key features of a competence oriented approach

The most distinctive features of this approach may be summarized as follows:

- **Meaningful contexts**  
For learning to take place it is recommended that educators 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.
- **Room for initiative and creativity**  
In order to acquire competence(s) it is required that the learners are given room to take initiatives. It is a vital condition since competence implies taking initiatives, being creative, seeking to fulfill one's own ambitions.
- **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.
- **Cooperative, interactive learning (with peers, teachers and other actors)**  
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 competence in their own learning itinerary.
- **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.
- **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.
- **Personal learning**  
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.



## Implications

From learning to act towards acting to learn, that is basically the core of the concept of competence oriented education. Therefore a trainer should:

- formulate goals in terms of competences;
- organise a work/learning setting;
- create a rich learning environment that includes dilemmas, options;
- provide realistic professional tasks and assignments;
- provide inputs, organise dialogues ;
- organise reflection, provide inputs ;
- assess demonstrations of competence;
- provide feedback and suggest further action.

## Validation

A next step in the professional development of heritage interpreters through 'recognized competence oriented in-service training' is the validation of their learning outcomes. Validation is 'the process of identifying, assessing and recognising skills and competences acquired in formal, non-formal and informal settings'.

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.

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.

### 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' 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.

### Documentation

Documentation in this context 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.

### **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.

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).<sup>11</sup>

### **Certification**

Assessment is followed by certification: an official confirmation of the achievement of learning outcomes. 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).<sup>12</sup>

One could also link up with the European System of Credits for Vocational Education and Training – ECVET.

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 and 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.<sup>13</sup>

11 European Guidelines for validating non-formal and informal learning, CEDEFOP 2014  
12 Ibid.

13 <http://www.reveal-eu.org/>



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