Training Policy

June 2018

Instead of an introduction

How did IE's training programme evolve?

IE's training programme was launched in 2015, encouraged by a strategy paper requesting a training and certification programme which had been endorsed by IE's Supervisory Committee. After a workshop at the IE Conference in June 2015 in Kraków, it was agreed to ask the EU-supported HeriQ Project partner consortium for permission to transform its tried-and-tested 40-hour interpretive guiding curriculum into IE's first certification course. A subsequent agreement was signed in September 2015. IE established a Training Team in February 2016 to develop its training and certification programme and opted to use the HeriQ course as a model to devise other certification courses.

The HeriQ guide course was rooted in a 2003 pilot course from an earlier EU project called TOPAS. It is therefore the fruit of a considerable number of years of international experience, development and evaluation. An added, and not insignificant, bonus was that the HeriQ course material was available in 12 languages and that IE members from eight countries were involved devising and delivering the resulting guide training courses. Other substantive experiences from additional European projects on interpretive training and education were also factored into the Training Team's considerations, such as the findings and recommendations from projects like HISA, InHerit or IOEH (see www.interpret-europe.net/projects).

The most obvious model to use when devising IE's training and certification programme was that of the National Association for Interpretation (NAI), in the USA, which, at the time, offered the only fully operational training and certification programme of any interpretation association. It should be noted that several IE members are NAI-certified guides, trainers or planners.

Reasons behind the development of the programme

The implementation of IE's own training and certification programme stems from two considerations:

1. According to its Constitution, IE shall conduct training activities.
2. A significant growth in membership numbers is critical for IE.

One of IE's constitutional tasks is to enhance heritage interpretation as part of public education. IE shall further maintain, develop and share the principles and methods of heritage interpretation. Devising and delivering IE's training programme, together with specific tasks and responsibilities, has been seen as one critical way to achieve this goal. The programme must embody what IE stands for, and offer capacity building opportunities for other stakeholder organisations to incorporate heritage interpretation into their own training programmes, based on IE course modules.

IE's 2016-2020 strategy infers that economic independence shall be secured through income from membership fees. An exclusive IE training programme with an increasing number of IE-certified trainers has been seen as the most critical lever to achieve this goal. It has therefore been decided that IE should charge no course or certification fees from trainers or participants and give trainers as much freedom as possible in running IE courses in return for participants taking out IE membership as a mandatory condition to join any course in the IE training programme. In 2016-17, 249 new individual or professional members joined IE through its training programme.

IE training attributes

Training provided by IE is intended to help interpretive professionals, and others, who want to improve their interpretive skills and abilities to become more competent and successful in their work.

The fact that only IE-certified trainers can run IE courses and certify trainees provides for a robust and committed IE trainer network, based on shared knowledge and experience. This helps to maintain high standards and to convey the inherent qualities of IE training in a consistent manner.

Based on an enquiry conducted during a meeting of the Management with the designated IE Training Team in February 2016, in Brno, some key attributes to be taken into consideration when preparing and running any IE course were compiled. These qualities were presented, discussed and agreed by a wider circle of IE members in an open workshop held during the IE Spring Event in Prague in May 2017. Among those who participated in the workshop were many longstanding and new IE members, with considerable training and interpretive experience. However, the agreed attributes are by no means a finite subject and discussion is ongoing as IE's training programme develops.

The agreed demands are the following:

1. To foster the IE network for quality interpretation
2. To put things in a wider context and offer a bigger picture of conservation and sustainability
3. To have transparent and clear certification requirements
4. To follow the cooperative approach
5. To offer challenges
6. To offer variety
7. To be supportive and inspiring
8. To remain fresh and relevant
9. To be rewarding, meaningful and well-prepared
10. To open up professional opportunities

To foster the IE network for quality interpretation

IE's mission is to serve all who use first-hand experiences to give natural and cultural heritage a deeper meaning and its two key strategic goals for 2016-2020 are to grow a membership that supports and that is supported by the association, and to anchor heritage interpretation at European and national levels.

IE courses should fulfill the quality criteria mentioned in this paper, not only to give an additional incentive for existing members to continue their membership and to be an active part of IE's network, but also to attract new members to this network. IE's idea is to enhance the quality of the work done by parks and monuments, museums, zoos and botanical gardens as well as many other institutions related to natural and cultural heritage, by an active exchange including many countries in Europe and beyond. This is the reason why IE course participants need to be individual or professional members. So far, members from more than 45 countries are part of this network.

Furthermore, IE courses should be able to address the needs and mentality of different European countries while at the same time preserving their European identity and promote European heritage as a common bond that unites interpretive professionals from all over this continent. Together with other key stakeholder organisations, IE is working towards this goal. It has therefore been awarded with the European Commission's Altiero Spinelli Prize 2017.

IE courses exist as one part of the network's activities. It is therefore important that they promote IE's mission and help to achieve its goals by contributing with measurable outcomes to its management and action plans.

To put things in a wider context and offer a bigger picture of conservation and sustainability

According to one of the oldest principles of heritage interpretation, "Interpretation is the revelation of a larger truth that lies behind any statement of fact". The same principle applies to IE courses, where participants learn not just how to find and reveal deeper meaning in heritage phenomena but also how to encourage visitors or residents to do so.

Course activities and discussions must be planned and implemented in such a way that trainees understand how to use interpretive techniques to achieve their aim.

To have transparent and clear certification requirements

A pre-determined set of criteria must be met in all IE course for any participant to be certified. These criteria, along with details about the certification process, can be found in the training and certification plans produced for all courses. They are written in a clear way that leaves no room for ambiguities, in order to make the trainers' work easier and the certification process as clear as possible to everyone.

To follow the cooperative approach

To ensure that IE courses have a long-lasting networking impact, they promote the building of strong relationships between the participants, as well as between the participants and the trainer(s). Different variables from the Training and Certification Plans help group dynamics evolve quickly within the courses creating a strong feeling of belonging. This is achieved through:

- interactive activities
- exercises where participants have to work as pairs or teams
- peer evaluation
- discussions made in a way that everybody is encouraged to participate
- emphasising the trainer's role as a facilitator during the whole process

Exercises and discussions are based on a capacity building process (where everybody tries to improve themselves) rather than a good/bad, or right/wrong performance.

Finally, even after the course ends, participants can keep in touch with their trainers (as well as the rest of the IE network) through multiple events and/or other courses organised by the association, as well as social media, newsletters, etc.

It should be noted that participants are encouraged to create that same feeling of togetherness and to invest in group dynamics when dealing with visitors, residents or other stakeholders in their everyday professional life.

To offer challenges

The activities in an IE course are designed to build on the pre-existing knowledge and the personal and professional experience the participants have. However, all courses are based on

the trainees' active participation, which means that everyone has to get slightly out of their comfort zone and perform. This way, trainees face a challenge, but in an environment that feels safe, thanks to the group dynamics and the trainer's role as a mentor.

Furthermore, IE courses are also challenging since they use original heritage phenomena and sites offering multiple different stimuli that become the source of interpretation in the hands of the participants.

This challenge reaches its climax when participants are asked to strengthen their competences by combining the theory learnt and the knowledge and skills they acquired during the course with their actual professional reality.

However, by doing so, trainees are encouraged to find ways to re-think their usual attitudes when presenting heritage to the public and thus find their own solutions on how best to use heritage interpretation in their profession.

To offer variety

IE courses include a multitude of different training techniques, such as field and class-based exercises, work in pairs, group or individual work, facilitated discussions, study visits, participants presenting their work, peer assessment based on specific criteria and even a written test and homework task that corresponds to different aspects of heritage interpretation.

Equally, participants are also part of the training process, since they bring their own prior knowledge and experience and also act as evaluators when needed. This way, each group and each course develops its own dynamic, while differences between group members offer another aspect of variety.

To be supportive and inspiring

IE courses support the idea of contemporary heritage interpretation. Therefore, all activities mirror and promote a specific attitude that we expect interpreters to have after completing these courses. For example, most course activities are hands-on, promoting personal contact with the site/heritage presented and seek to reveal a deeper meaning the heritage might contain.

Furthermore, all IE courses can, and are supposed to, be organised in or next to a heritage site, and use original phenomena of natural and/or cultural heritage. This way, participants get inspired by the sense of the place and the phenomena they use, while at the same time using interpretive techniques to transfer this inspiration to others.

However, the main source of inspiration comes from the trainers, and this is why in all courses they must be able to demonstrate at least one good example of the interpretive technique they are teaching, such as an interpretive talk, for a CIG course, or an interpretive presentation, in CIH course, etc.

To remain fresh and relevant

IE training and certification plans are not written in stone. The whole network of IE trainers tests them with every course they run and they can report their own findings about them to the training team. At the same time, the trainers are offered multiple opportunities to interact within IE's network and propose new ideas or solutions that could eventually be introduced to one of the courses.

The training team is responsible for updating these courses, by fine-tuning the Training and Certification Plans and by keeping the trainers informed about any changes made.

To be rewarding, meaningful, well-prepared

All trainers follow a specific, tested and approved Training and Certification Plan according to the course they are running, and need to carefully follow the directions given to it. Furthermore, IE trainers must submit the outline (daily schedule) of their planned course to the Training Coordinator, one month before the course begins.

IE courses are devised for professionals who wish to improve their interpretive skills, so this is the type of participant we must keep in mind when preparing our Training and Certification Plans for every course.

This particular type of participant, with prior professional experience in the wider field of heritage management, planning and communication should be considered when preparing the activities of each course. They should use participants' prior knowledge and experiences as a basis to build further skills and capacities.

In addition, all courses should consist of activities with a clear aim and objectives focused on the certification of the participants. They should not be just a series of fun games and presentations. The training plan is a complete procedure that ensures participants improve within the foreseen duration of the course.

To achieve this, the Training and Certification Plan includes all information a trainer might need in order to run the course. It describes detailed directions about the purpose, participant requirements, daily schedule, activities, material needed, time/exercise, etc. to keep an homogenous, common way of running a course.

To open up professional opportunities

The training programme is part of IE's mission "to serve all who use first-hand experiences to give natural and cultural heritage a deeper meaning", as it offers interpreters the opportunity to improve their professional skills and expand their competences in all different aspects of heritage interpretation.

Therefore, this must be the purpose behind all IE courses, the compass when creating each course's Training and Certification Plan and the criterion to evaluate the success of the curriculum.

IE supports all its members in their professional development, and its trainers especially, in being good and reliable partners for institutions who are interested in organising IE courses.

How is IE's training programme organised?

What responsibilities does the IE Training Team have?

The IE Training Team was established:

- to take responsibility for the development and promotion of IE's training programme, with special attention to the quality of course modules and trainers
- to make all necessary efforts so that IE courses always remain fresh, relevant and contemporary
- to organise a network of IE trainers and to advise them in their cooperation with organising partners
- to secure for financial and political support for the IE training programme, in agreement with the Directors.

After consulting Training Team members, the Training Coordinator submits an annual action plan for all the association's training-related activities, including a timeline with verifiable milestones. These must be agreed by the Management and included in the IE management plan to allow quarterly reporting by the Training Coordinator.

Running and developing the programme

The training process

IE courses must be clearly announced as IE events. As members of IE, all course participants at these IE events benefit from a basic liability insurance.

IE trainers organise their own courses at venues of their choice in any language they prefer. Although they usually cooperate with an organising partner, they are ultimately responsible for the course including matters such as budget, preparation of training material in the course language, organisation of study visits, etc.

IE trainers can only organise and run the type of courses for which they have been certified as trainers. They must inform IE that they intend running a course and provide basic details, at least one month prior the start date, by completing an online pre-course questionnaire. There is no limit on the number of courses that an IE trainer can run, or an IE member can attend, within a year.

All individual or professional IE members can attend the course of their choice after following the application procedure set by the trainer responsible for the course. If the IE trainer confirms that a trainee has fulfilled all necessary criteria as set by the agreed Training and Certification Plan for the respective course, they receive an official, printed IE certificate signed by the Training Coordinator and the trainer, as well as an enamel lapel badge showing their certified status.

All certified participants can use the intials CIG, CIW, CIH, etc. and wear the IE lapel badge as long as they are active members of good standing of IE. They must relinquish the badge and cease promoting themselves as IE CIGs, CIWs, CIHs, etc. if they decide to leave IE's network. However, they can always use the certification they achieved in their CVs.
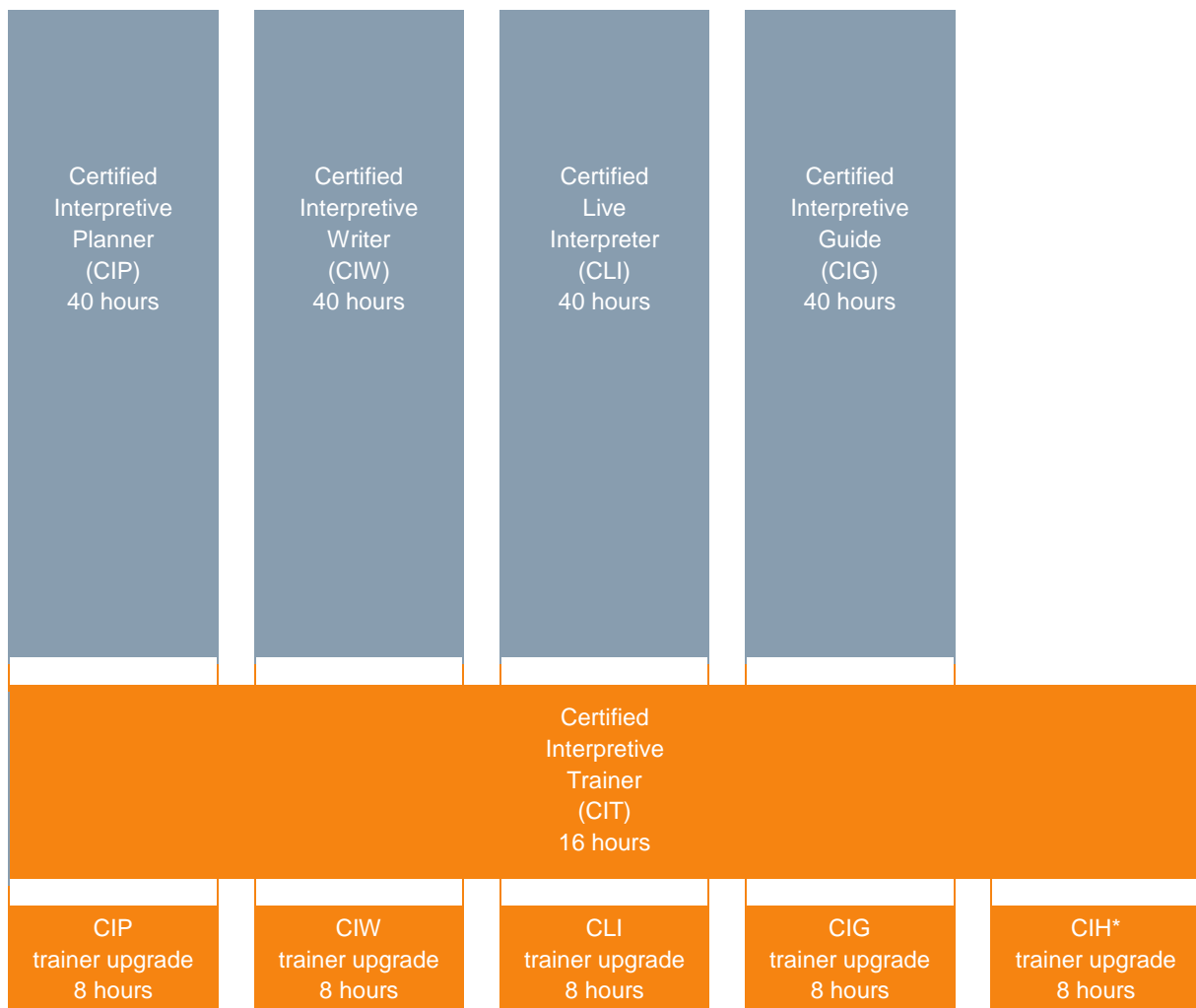
Training resources

The Training and Certification Plan for each course specifies the volume and nature of training material to be prepared and used by the trainer. All IE training material is prepared by those who develop the course, tested in a pilot course, approved by the IE Training Team and confirmed by the Board of Directors.

IE strongly encourages the translation of training material in different languages to facilitate the dissemination of IE courses Europe-wide.

All training material must comply with the quality criteria established by IE for its training programme. Training and Certification Plans as well as training material are continuously evaluated and can be amended, but not more frequently than once a year.

Current IE training course programme

Certified Interpretive Planner (CIP) 40 hours	Certified Interpretive Writer (CIW) 40 hours	Certified Live Interpreter (CLI) 40 hours	Certified Interpretive Guide (CIG) 40 hours

Certified Interpretive Trainer (CIT) 16 hours

CIP trainer upgrade 8 hours	CIW trainer upgrade 8 hours	CLI trainer upgrade 8 hours	CIG trainer upgrade 8 hours	CIH* trainer upgrade 8 hours

* To join the CIH (Certified Interpretive Host) trainer upgrade, trainees need to join the CIG course and the CIT course before.

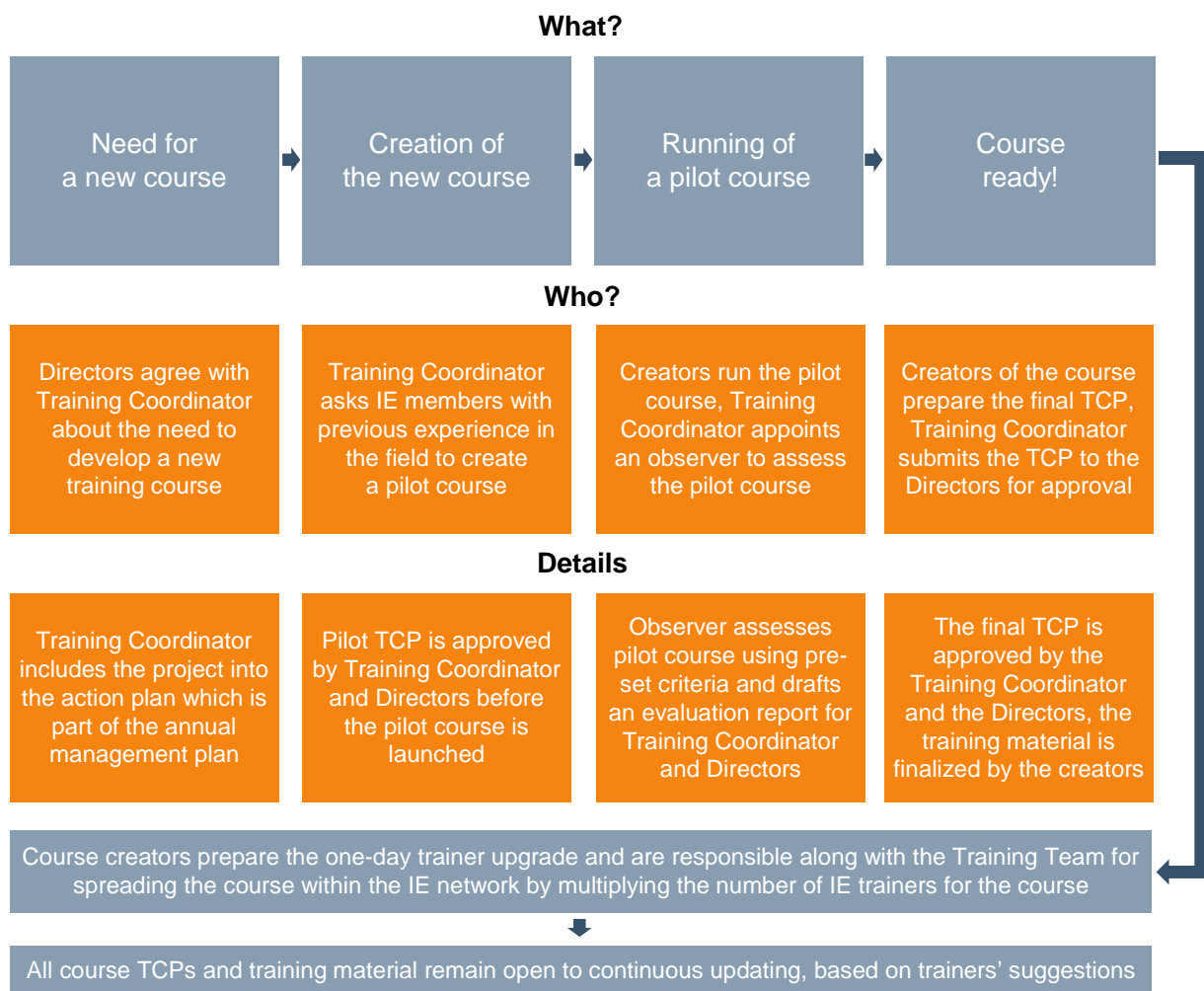To run a course, a trainer needs to have at least 64 hours of training:

1. the regular course (40 hours) including all requirements and successful certification
2. the trainer course (16 hours) including all requirements and successful certification
3. the trainer upgrade dealing with the curriculum for the regular course (8 hours).

Developing new courses

All new courses in IE's training programme are developed under the guidance of the Training Coordinator, by input from IE members with previous heritage interpretation and training experience and after prior agreement with the Training Team and confirmation by the Management (Board of Directors).

The key document used to devise and deliver of each course is a specific Training and Certification Plan which is drafted by the development team together with the Training Coordinator and which, again, needs to be confirmed by the Directors.

The diagram below illustrates the process to create a new IE course:

What?

Need for a new course	Creation of the new course	Running of a pilot course	Course ready!

Who?

Directors agree with Training Coordinator about the need to develop a new training course	Training Coordinator asks IE members with previous experience in the field to create a pilot course	Creators run the pilot course, Training Coordinator appoints an observer to assess the pilot course	Creators of the course prepare the final TCP, Training Coordinator submits the TCP to the Directors for approval

Details

Training Coordinator includes the project into the action plan which is part of the annual management plan	Pilot TCP is approved by Training Coordinator and Directors before the pilot course is launched	Observer assesses pilot course using pre-set criteria and drafts an evaluation report for Training Coordinator and Directors	The final TCP is approved by the Training Coordinator and the Directors, the training material is finalized by the creators

Course creators prepare the one-day trainer upgrade and are responsible along with the Training Team for spreading the course within the IE network by multiplying the number of IE trainers for the course

All course TCPs and training material remain open to continuous updating, based on trainers' suggestions

Training trainers

How to become an IE trainer

Every year, IE organises and runs train-the-trainer courses. To attract participants from all over Europe and to emphasise the European dimension of IE, these courses are held in English and fees are aligned to the GDP of the trainees' countries of residence. To be certified as a trainer, participants first need to be certified for the particular field they intend to work in.

For example, if an IE member wants to receive the certificate as a guide trainer, they first need to secure the IE certificate for interpretive guides (CIG), i.e. after completing the 40-hour guide course, passing the written and practical exam, and submitting the specific homework task to the required standard. This ensures that all trainers have experienced the sessions, exercises and requirements as participants in their own right before they use them to train others. It also ensures that trainers can get into an effective exchange about courses with their IE trainer colleagues.

Participants in all IE courses can have different backgrounds and do not necessarily need to have in-depth knowledge about heritage interpretation when they join a course. However, trainer candidates need to prove that they have training experience as well as experience on the field they will be asked to deliver training courses (guiding, writing, planning, etc.).

Certified Interpretive Trainers (CIT) are certified after successfully passing the two-day trainer course but they cannot run any IE course until they also attend and successfully pass the one-day trainer upgrade in the specific courses related to their regular certificates (e.g. CIG, CIW, CIP).

Trainer trainees must demonstrate that they are able to teach according to IE's quality criteria. An external examiner, usually an active IE trainer with at least two years' experience, assesses this demonstration and give their recommendation.

As in all courses, trainees cannot have a "0" in one of the criteria. Additionally, if the examiner marks 2 or more of the following criteria with just one "+", the participant will have their trainers certificate deferred for a provisional period. This means that they need to assist another qualified trainer delivering a regular course, and then their abilities must be newly assessed to secure full trainer certification. The specific evaluation criteria referred to above are:

- Were all the trainer's instructions understandable?
- Did the trainer explain what the trainees should learn from the exercise?
- Did the trainer illustrate links between the exercise and interpretive theory?
- Did the trainer provide feedback to the trainees in an encouraging way?
- Did the trainer show felixibility, if required?

All trainer certificates are signed by a Director and the Training Coordinator. They are valid as long as trainers are active IE members of the trainer network and fulfil the following requirements:

- contribute to the trainer network by uploading either new training activities and/or presentations, consistent with IE's training philosophy, or updated existing ones
- review homework of a trainer trainee at least every two years[1]

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[1] Counting from the year after their certification

- run an IE webinar at least every two years[1]
- run one of the courses for which they are certified at least every two years[1]

Furthermore, an IE trainer may lose their status if course participants failed to join IE or if the Directors decide trainers acted against IE's mission or purpose, according to §2 of its Constitution.

IE trainer-trainers need to be experienced IE trainers. They are proposed by the Training Coordinator and must be appointed by the Board of Directors.