interpret europe
European Association for Heritage Interpretation

Training policy

Background

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, IOEH or DELPHI (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.

Drivers behind the development of the training 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 courses and 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. Since 2016 more than 980 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 training events 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 interpretation 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:

- To foster the IE network for quality interpretation;
- To put things in a wider context and offer a bigger picture of conservation and sustainability;
- To have transparent and clear certification requirements;
- To follow the cooperative approach;
- To offer challenges;
- To offer variety;
- To be supportive and inspiring;
- To remain fresh and relevant;
- To be rewarding, meaningful and well-prepared;
- 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. 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 members. So far, members from more than 55 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 and modules 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 certification courses 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 especially IE certification 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 or modules 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 training event are designed to build on the pre-existing knowledge and the personal and professional experience the participants have. However, all courses and modules 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 training events 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 or module 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 and modules 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, in the case of certification courses, practical exams, written tests and homework tasks that may involve intense tutoring.

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 training event develops its own dynamic, while differences between group members offer another aspect of variety.

To be supportive and inspiring

IE courses and modules 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 events. For example, most training 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 and modules 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 training events they must be able to demonstrate at least one good example of the interpretive technique they are teaching, such as an interpretive talk, in a CIG course, an interpretive panel, in a CIW course, etc.

To remain fresh and relevant

IE training plans are not written in stone. The whole network of IE trainers tests them with every course or module 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 training events.

The Training Team is responsible for updating the courses and modules, by fine-tuning the training 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 or training plan according to the module 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 training event to the Training Coordinator, one month before the event begins.

IE certification 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. IE modules are open to all members.

The 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 certification course. They should use participants' prior knowledge and experiences as a basis to build further skills and capacities.

In addition, all certification 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 and certification 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 training events, the compass when creating each training plan and one 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 training events.

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 courses, modules and trainers;
- To make all necessary efforts so that IE courses and modules 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 annual management plan to allow quarterly reporting by the Training Coordinator.

How is IE's training programme communicated?

In line with IE's decision not to seek direct financial gain from its training programme (i.e. no course or certification fees but rather mandatory membership for participants), certified IE trainers are responsible for securing training opportunities, ideally with organising partners. In addition to this policy document, IE has produced a FAQ (frequently asked questions) paper which provides trainers with guidelines and detailed advice on how to do this, thus ensuring that each training event meets IE training requirements.

While IE's policy is to empower its certified trainers to promote and deliver IE's training programme, all IE training opportunities generated by their efforts must be notified to the IE Training Coordinator by completing an online pre-course questionnaire. This questionnaire states where and when a course or module will take place, together with the proposed fees, etc. If this procedure is neglected, the course or module cannot be a recognised IE event. This registration process also ensures that IE is aware of planned events and the trainers responsible for them.

How are the trainers for particular courses selected?

If IE receives a request from an interested party to run an IE training event, this is transferred to the Training Coordinator who is responsible for providing the individual or organisation with all necessary information about the training programme. The Training Coordinator provides a full list of all certified IE trainers, including their contact details, the IE courses or modules they are qualified to run and the languages they are fluent in. This is based on the Training Team records as well as the personal statements by the trainers themselves. Once the interested party has read the documentation received, is familiar with the IE training programme and the specific course they require, they can then select the trainer of their choice and contact them directly.

The list of certified IE trainers is regularly reviewed. It is the responsibility of the Training Coordinator to ensure that all written information related to the courses and modules a trainer can run and their IE status is updated. In return, IE trainers must inform the Training Coordinator about any changes regarding contact details, etc. that they wish to be included in this list.

As stated above, IE shares training programme information with interested parties, leaving the latter to agree the type of contractual arrangement with the trainer of their choice. IE bears no responsibility for these contractual arrangements, leaving both the interested party (eventual organising partner) and the trainer to agree on mutually appropriate terms and conditions to deliver the IE training event.

Running and developing the programme

The organisational and training process

Although IE trainers usually work together with an organising partner, IE trainers are ultimately responsible for the course or module, including the preparation of training materials in the appropriate language, arranging study visits, etc. IE trainers organise their own courses at venues of their choice in the language they prefer.

IE training courses and modules must be clearly publicised as IE events. Only then can all course participants at these events benefit from basic liability insurance cover as members of IE.

IE trainers can only run the type of courses for which they have been certified. Furthermore, they can only run the modules they have themselves attended. Trainers must also inform IE that they intend running an event and provide basic details, at least one month before the start date, by completing an online pre-course questionnaire. There is no annual limit on the number of events that an IE trainer can run, or an IE member can attend.

Individual IE members can attend the course or module of their choice after completing the application procedure set by the IE trainer. If the IE trainer confirms that a trainee has fulfilled all necessary criteria as set by the agreed plan for the respective module or course, participants can ask for an IE confirmation of participation signed by the trainer. By contrast, participants joining a certification course (e.g. CIG) and who successfully complete all tasks described in the appropriate course training and certification plan, receive an official IE certificate signed by the Training Coordinator and the trainer. This confirms the deliverables necessary to achieve certification, as well as a digital logo showing their certified status and the year it was achieved. All certified participants can use the digital logo. This is renewed annually for as long as certified trainees are active IE members and of good standing.

IE Certified Interpretive Trainers receive their certificate, signed by one Director and the Training Coordinator, a digital logo and an enamel badge which they can wear as long as they are active trainers. In this case, the digital logo is also used to prove their annual license and is renewed if the trainer can verify they have met a set of requirements (see p. 12)

Training courses and modules

The training and certification plan for each certification course or the training plan for each training module 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 event, which is then tested in a pilot event, approved by the IE Training Team and confirmed by the Board of Directors.

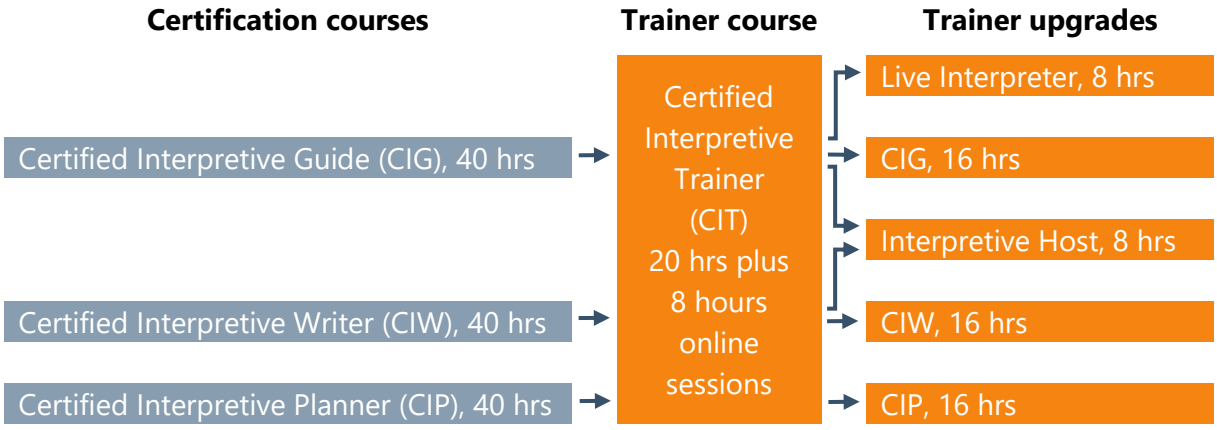
IE strongly encourages the translation of training material in different languages to facilitate the dissemination of IE training events Europe-wide.

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

To run a course, a trainer must have personal training experience and at least 84 hours of IE training:

1. One certification course (40 hours) including all requirements and successful certification;
2. The trainer course (20 plus 8 hours) including all requirements and successful certification;
3. One trainer upgrade (16 hours).

To run a module, a trainer must fulfil steps 1 and 2 above and have attended the module and the particular 8-hour upgrade (instead of 3).



As shown above, to join a Certified Interpretive Trainer (CIT) course participants must have successfully completed one of the three other certification courses (CIG, CIW or CIP) and have previous experience in adult training. Then, after completing the CIT course, CITs need to join the particular trainer upgrade (CIG, CIW or CIP) before they can run their own IE certification courses. CITs can only run the certification courses for which they have themselves been certified.

For the training modules, trainers must hold a CIG certificate to run the 'Live Interpreter' training module and either CIG or CIW certificates to run the 'Interpretive Host' training module.

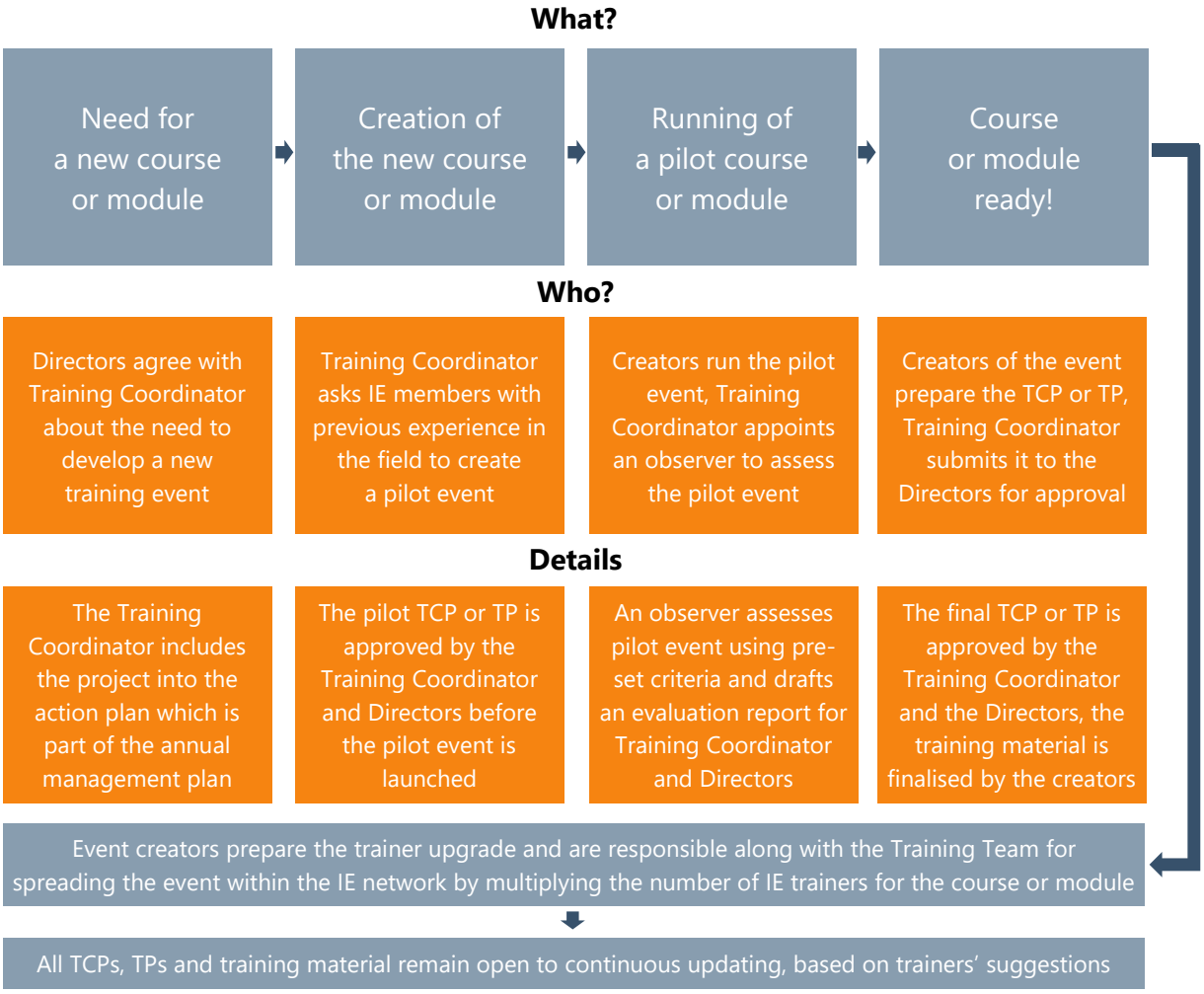
Developing new courses or modules

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

The core document used to devise and deliver of each training module is a training plan (TP), while its counterpart for the certification courses (CIG, CIW, CIP, CIT) is a specific training and certification plan

(TCP) which is drafted by the development team together with the Training Coordinator and confirmed by the Director/s.

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



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 in order to strengthen the IE trainer network 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 join an IE trainers' course, participants must be certified in at least one other IE certification course and have previous experience in adult training.

To teach a certification course, a trainer must hold the particular certificate of the course they want to teach. For example, if an IE member wants to run CIG courses, 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. The same is true for modules although they don't include a certificate.

Participants in all IE courses and modules can have different backgrounds and do not necessarily need to have in-depth knowledge about heritage interpretation when they join an IE training event. 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 or modules.

Certified Interpretive Trainers (CIT) secure their certification after joining four online pre-course sessions taking two hours each and successfully passing the 2.5-day trainer course including a practical exam, written test and homework. However, they must also attend and successfully pass the specific 1 or 2-day trainer upgrade before they can run any IE course or module.

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 two 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?

Conditions to keep the trainer license

Together with their CIT certificate, IE trainers receive a trainer license which is renewed every year as long as trainers can prove they are active IE members of the trainer network and fulfil the following requirements:

- Contribute to the training programme by sharing new, or updating existing, training activities and/or presentations with IE's trainers network consistent with IE's training philosophy;
- Review the homework of a trainer trainee at least every two years, counting from the year after their certification;
- Run an IE webinar at least once every two years, counting from the year after their certification;
- Run one of the courses for which they are certified at least once every two years, counting from the year after their certification;
- Join at least six online IE trainer meetings per year;
- Join at least four IE webinars per year;
- Participate in all stages of the annual peer evaluation of CITs.

All of the above will need to be verified by the CITs who wish to keep their annual license, by 15 December, to the Training Coordinator and the Membership Support Officer.

Trainers cannot promote themselves or act as IE trainers if they have no valid trainer license. Furthermore, an IE trainer can lose their status, for example 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, or if feedback forms from training events reveal considerable deficits.

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.