



Professional Development in Heritage Interpretation

Manual







**Professional Development
in Heritage Interpretation**

Manual



ISBN 9789081794145
Legal deposit: D/2016/8926/1

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

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

Design & production: COMMIX Graphic Solutions – www.commix.be

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

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





Professional Development in Heritage Interpretation

Manual

Editor:

Guy Tilkin

The chapters in this manual are the result of the work of the partnership. Many partners contributed through research, collecting good practices, running pilots, reports ... but for each chapter we mention the authors and/or editors.

Project partners and co-authors:

Darko Babic, Kasia Baranska, Clelia Caprioli, James Carter, Maurilio Cipparone, Susan Cross, Rita De Stefano, Willem Derde, Kasia Dziganska, Ingrid Gussen, Piotr Idziak, Patrick Lehnés, Eva Sandberg, Per Sonnvik, David Thomas, Ludwig Thorsten, Guy Tilkin, Steven Richards-Price, Jaap Van Lakerveld

Project co-ordinator





Table of Contents

CHAPTER 1 Heritage Interpretation	10
CHAPTER 2 Success Factors for Heritage Interpretation	21
CHAPTER 3 Reflections on Heritage Interpretation in a World of Plurality	29
CHAPTER 4 Educational Goals of Interpretation	51
CHAPTER 5 Competences for the Professional Field of Heritage Interpretation	62
CHAPTER 6 Professional Development of Heritage Interpreters	92



Introduction

Lifelong Learning

'Education and Training 2020' (ET 2020) is the strategic framework document for education and training that fits into Europe 2020, the European Union's 10-year strategy for growth and employment. One of its basic concepts, 'Life Long Learning', makes it clear that one learns throughout life and that initial (formal) education and training only does not offer a solid enough basis for a successful career till retirement. Society changes rapidly, a professional career usually involves changes and different jobs and the open borders in Europe foster an increasing mobility of employees. Time to pay attention to continuous professional development and in-service training.

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. Only in conditions of specialisation, in-service training or 'on the job' training, heritage comes in. Therefore it is important for the sector to embrace 'competence oriented in-service training'.

There is another reason for heritage to play the 'educational card'. 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 areas, 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, while heritage interpretation offers ideal techniques to make this learning as meaningful as possible.

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. Cognitive and emotional links are created between the visitors and what they can discover in a nature park, a historic site or a museum. It reveals deeper meanings, relationships and insights from first-hand experience and by means of illustrative media, rather than by simple communication of factual information. Heritage interpretation also contains a structural element of learning.

Special characteristics of interpretation are:

- Visitors should normally not perceive interpretation as an educational activity but as an interesting and enjoyable service that enhances their heritage experience. Nevertheless, heritage interpretation is a 'structured approach to facilitate learning processes', which qualifies as an educational activity.
- Interpretation works from the specificities of a site or collection towards more universal ideas, i.e. it focuses on site-specific phenomena and facts and reveals the wider and deeper meanings by embedding the specificities in meaningful contexts.
- Interpretation specialises in motivating non-captive target audiences by addressing their needs, by raising expectations and fulfilling them. Interpretation also tries to actively involve audiences by relating the content to their personal knowledge, interests, feelings and values and by encouraging discovery, engaging senses and reflection.



Professional Development in Heritage Interpretation

In Europe several ten thousands of people are involved in the field of facilitating informal and non-formal learning for visitors of natural and cultural heritage sites, monuments and museums. But probably only a fraction of this group has ever heard about the discipline of 'heritage interpretation'.

Only a limited number of people working in the heritage field have ever had any 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 then they 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 interpretive products in heritage sites.

What is true for permanent staff applies even more to part-time employees, self-employed contractors or the large and indispensable group of volunteers at heritage sites or museums, zoos or botanical gardens.

Therefore 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?

InHerit

InHerit is a Grundtvig Multilateral project aiming to improve the learning experience of non-captive audiences visiting heritage sites and museums by developing the interpretation competences of all relevant professionals on site. InHerit 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.

Therefore the team has created in-service training material to facilitate quality in-service training courses on heritage interpretation.

The major milestones of the project are:

- Development of a competence profile for Heritage Interpretation (HI) staff
- Analysing the training needs of HI staff
- Collecting good practices in HI training
- Finding the theoretical basis to link HI and European education
- Developing an in-service training curriculum
- Preparing course material and a course manual
- Running pilot courses in the UK and in Italy and national training days in each partner country
- Developing a validation system for the competence development of HI professionals and their audiences
- To disseminate and exploit all project outcomes
- To organise a final international conference in Belgium in 2016

Competences

The basis for the creation of a curriculum for heritage interpreters is the HI competence profile, a reference framework for competences in the professional field of heritage interpretation.

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 recognised) 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 recognised, 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 team has defined areas of competences which are relevant for the professional field as a whole. Core competence areas are: research, planning, delivery by media and personal delivery. Additional generic competence areas are: evaluation, publicity & promotion, management and training. In each area the competences are described according to context and qualification level. These levels go along with the descriptors in the European Qualifications Framework (EQF). The profile allows those who develop or offer training and education to conceive and organise their course as a competence oriented course and present the learning outcomes in terms of competence development. It will also help relate the certificates or qualifications in heritage interpretation to national qualification frameworks and to the EQF.

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 which country the competence has been gained in and what 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 systematically 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.

InHerit competence descriptions might be useful for training needs assessments for staff already employed. It could

provide some direction for individual learning agreements and a more needs-driven approach to continuous professional development (CPD) and lifelong learning of adult education staff.

The manual at hand is mainly intended for those who are involved in developing training and higher education programmes in heritage interpretation which are part of CPD and/or which lead to qualifications in this field. It can also be valuable for others who want a comprehensive overview of the professional field of heritage interpretation and what it involves.

As a reader you will find:

- An introduction to the discipline of heritage interpretation and its role within adult education/lifelong learning in Europe.
- Principles of good interpretation and their application with different media and at different settings
- Educational goals for interpretation: bringing together the needs and goals of adult learners, facilitating the 'learning that happens everywhere'.
- Professional ethics: relation to humanistic, emancipatory general education movements, respect for the learner, respect for heritage, opportunities to foster European values.
- Professional development in heritage interpretation: introduction to the competence profile and the principles of competence oriented training, introduction to the principles for validation.

Support material

More support material (e-manual, e-book, educational guidelines ...) for the professional development of heritage interpreters is available on: www.interpretingheritage.eu

On behalf of the InHerit team

Guy Tilkin, Alden Biesen
InHerit coordinator

CHAPTER 1

HERITAGE INTERPRETATION

Willem Derde & Ludwig Thorsten





What is heritage interpretation?

Heritage interpretation is a non-formal learning approach which means it

consists of learning embedded in planned activities that are not explicitly designated as learning, but which contain an important learning element.¹

Heritage interpretation is taking place at natural or cultural heritage sites such as protected areas or historic buildings, or at heritage-based collections such as museums, zoos or botanical gardens.

Heritage interpretation is practised in many countries around the world where it is taught at different levels. In Europe, it can be studied at universities in single modules but only in the UK up to a master degree (MSc).

Early development of the profession

Heritage interpretation is rooted in the development of nature conservation in the USA, where the term 'interpretation' in a learning context was first used by John Muir. In 1871 he wrote:

I'll interpret the rocks, learn the language of flood, storm and the avalanche. I'll acquaint myself with the glaciers and wild gardens, and get as near to the heart of the world as I can.²

Muir describes an individual learning process, following the idea of translating the language of natural phenomena for

himself. The development of interpretation from there to a profession, aiming to acquaint visitors with heritage sites, took several decades. It is closely related to the US National Park Service which was founded in 1916, and where the concept evolved more from practice than from theory.



Rocky Mountains

One early example of this development was the 'Trail School' of Enos Mills who introduced a certification system for nature guides in the Rocky Mountains National Park before 1920, stating:

a nature guide is an interpreter.

Mills echoed the understanding of Muir when he described the nature guide as

a translator of the great book of nature.³

While interpreters in the US National Park Service were first called 'park naturalists', the responsibility of the Service was extended to cultural heritage in the 1930's. Since 1940, the term 'heritage interpretation' has been officially used for all information and education services.⁴

1 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

2 Wolfe, L. (1978) *The Life of John Muir*. Madison: The University of Wisconsin Press, 144

3 Mills, E. (1990) *Adventures of a Nature Guide*. Friendship: New Past Press – first published in 1920, 130 and 169

4 Mackintosh, B. (1986) *Interpretation in the National Park Service*. Washington: US Department of the Interior



Heritage interpretation was meant to support the administration of natural and cultural heritage sites to bring people into a closer contact with their heritage in order to value and to protect it. The general idea was to achieve

*protection through appreciation, appreciation through understanding, and understanding through interpretation.*⁵

In 1954, the first organisation of heritage interpreters, the Association of Interpretive Naturalists (AIN), was founded in the USA.⁶

Only in 1957 however, 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.*⁷

Early traces of interpretive thinking in Europe

The year 1957 is often mentioned when tracing back heritage interpretation as a profession. However, the idea of interpreting the heritage is as old as humankind and even if there are reasons to limit the scope to the late modern period (since the era of Enlightenment), basic values inherent in the concept can be traced back to the late 18th and early 19th century.

In the USA, heritage interpretation can be linked to American Transcendentalists such as Emerson and Thoreau. However, quite similar and even more extensive ideas of connecting experience and thinking, facts and meaning, in order to empower the individual to face the world can be found in the work of several European authors of that time, including Kant, Hardenberg (Novalis), Heine, the Humboldt Brothers or Goethe. Many of them are assigned to Idealism, Romanticism or New Humanism.⁸

Several statements of that time significantly remind of 20th century descriptions of interpretive processes, for example:

*To be a herald of nature is a fine and holy calling [...] For not the naked breadth and depth of knowledge, nor the ability to weave this knowledge into appropriate names and experiences and to replace the [...] foreign-sounding words with familiar ones, not even the talent [...] to order natural phenomena in [...] accurate and shining images, [...] all of this makes not the true challenge of a herald of nature [...] He who seeks everything in her [...] will only recognise his mentor and nature's confidant in him who speaks of her with reverence and faith.*⁹

Actually Tilden himself quoted the European poet Heinrich Heine to introduce one of the chapters of 'Interpreting Our Heritage'.

Don Aldridge, who first wrote about heritage interpretation in Europe, named Romanticism a key concept in environmental interpretation.¹⁰

5 Wirth, C. (1953) Securing Protection and Conservation Objectives Through Interpretation. Unpublished memorandum. Washington: US Department of the Interior

6 Merriman, T. and Brochu, L. (2006) The History of Heritage Interpretation in the United States. Fort Collins: interpPress

7 All references to Tilden in this chapter relate to : Tilden, F. (1957) Interpreting Our Heritage. Chapel Hill: The University of North Carolina Press, 8

8 Ludwig, T. (2011) 'Natur- und Kulturinterpretation – Amerika trifft Europa' ['Heritage Interpretation – America Meets Europe']. In Natur im Blick der Kulturen. ed. by Jung, N., Molitor, H. and Schilling, A. Opladen: Budrich UniPress: 99-114

9 Ludwig, T. (2003) Basic Interpretive Skills. Werleshausen: Bildungswerk interpretation, 66

10 Aldridge, Don (1989): How the Ship of Interpretation was Blown off Course in the Tempest – Some Philosophical Thoughts. In: Uzzel, D. (Hrsg.): Heritage Interpretation. London: Belhaven Press, 81



The introduction of the interpretive profession in Europe

Heritage interpretation saw its establishment first in the UK when the Society for the Interpretation of Britain's Heritage was founded in 1975. However, until the end of the 20th century, only a few publications from the UK found further distribution in the rest of Europe. Widely recognised was the planning handbook 'A Sense of Place', edited by James Carter.¹¹

First initiatives to implement heritage interpretation in Europe were taken in 1999 when two international projects were launched: the EU Lifelong Learning project TOPAS and the EU LEADER project Transinterpret.¹²

In the year 2000, Transinterpret resulted in setting up Interpret Europe as a network (European Network for Heritage Interpretation). This was mainly initiated by Patrick Lehnés who also advanced the foundation of Interpret Europe as an association in 2010. Consisting of more than 300 members from more than 40 countries, Interpret Europe runs annual international conferences and offers international training opportunities on heritage interpretation.

On a national level, interpreters in Europe are represented through organisations in Croatia, Czech Republic, Portugal, Spain and the UK, the latter counting more than 400 members which is the largest membership number of all heritage interpretation organisations in Europe.

Principles of heritage interpretation

Tilden's six principles of interpretation

In 1957, 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).

Most authors in the US build upon Tilden's principles.

11 Carter, J. (ed.) (1997) A Sense of Place – An Interpretive Planning Handbook. Inverness: Tourism and Environment Initiative

12 Clarke, R. (2006) The TOPAS Project. London: University of London. Cited in Kopylova, S. and Danilina N. (eds.) (2011) Protected Area Staff Training: Guidelines for Planning and Management. Gland: International Union for Conservation of Nature: 55

Lehnés, P. and Zanyi, E. (2001) Transinterpret. LEADER forum 2001 (3), 21



- Brochu, L. and Merriman, T. (2002) *Personal Interpretation*. Fort Collins: interpPress
- Buchholtz, J., Lackey, B., Gross, M. and Zimmerman, R. (2015) *The Interpreter's Guidebook*. 4th edn. Stevens Point: University of Wisconsin
- Ham, S. (2013) *Interpretation – Making a difference on purpose*. Golden: Fulcrum
- Knudson D. M., Beck, L., and Cable, T. T. (1999) *Interpretation of Cultural and Natural Resources*. State College: Venture Publishing
- Larsen, D. L. (ed.) (2011) *Meaningful Interpretation*. 2nd edn. Fort Washington: Eastern National
- Veverka, J. (1994) *Interpretive Master Planning*. Helena: Falcon Press



App and away, Touriseum, Merano

However, some authors have also suggested to extend the six principles in order to restructure Tilden's treatment of interpretation to fit today's world.¹³

Almost 60 years after 'Interpreting Our Heritage' was published, there are good reasons to put Tilden's work to the test. The two recent decades have been characterised by the

rise of new media and by the question what role they should play in the preparation of interpretive processes or even within these processes. One other reason was the United Nations' call for sustainable development and UNESCO's request that all stakeholders dedicated to learning should contribute to that worldwide goal.¹⁴ UNESCO also stated that meeting the challenges of sustainable development in democratic societies requires to strengthen learners through far-reaching participation.¹⁵

The most recent international document with significant outreach in terms of reflecting such issues against the background of heritage interpretation is the ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites, the so-called Ename Charter. Including the demands of sustainable development, this document underlines the relevance of associated communities connected with a heritage site.¹⁶

The idea not to reduce heritage interpretation to visitor services planned by experts, but to develop heritage sites together with their stakeholders is gaining ground in the current debate, and it is reflected by recent publications.¹⁷ Considering the current development of heritage interpretation, it should be noted that two out of the three publications mentioned before, the Ranger Interpretation Handbook from 2003 and the Ename Charter from 2008, were strongly influenced by European organisations.

However, so far none of the suggestions to add to the six basic principles of heritage interpretation has been widely recognised, often because it was found that contemporary approaches could be smoothly linked to Tilden's basic ideas. This leaves his work 'Interpreting Our Heritage' in the position of a well-acknowledged hub. Tilden's principles were derived from the

¹³ Beck, L. and Cable, T. (1998) *Interpretation for the 21st Century – Fifteen Guiding Principles for Interpreting Nature and Culture*. Champaign: Sagamore Publishing

¹⁴ IRF – International Ranger Federation (ed.) (2003) *Ranger Interpretation Handbook – Shared Principles: Heritage Interpreters Promoting Sustainable Development*. Copenhagen: Danske Miljøministeriet.

¹⁵ UNESCO – United Nations Educational, Scientific, and Cultural Organization (2008) *Framework of the United Nations Decade on Education for Sustainable Development International Implementation Scheme*. Paris: UNESCO Education Sector

¹⁶ ICOMOS – International Council on Monuments and Sites (2008) *The ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites*. Québec: ICOMOS

¹⁷ Brochu, L. and Merriman, T. (2011) *Put the Heart Back in Your Community*. Fort Collins: Heartfelt Publications

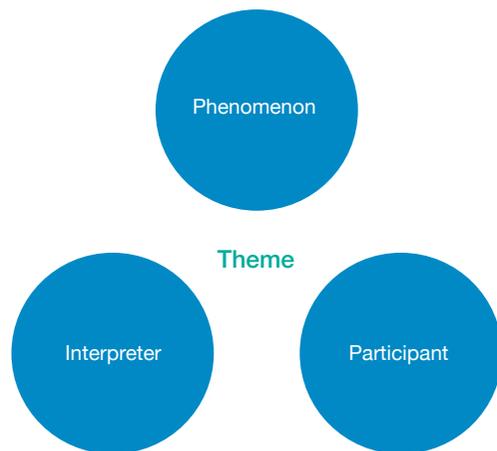


interpretive practice he observed, but meanwhile many of his ‘common sense statements’ could be underpinned by empirical research. Findings are published in various contexts, especially in the semi-annual *Journal of Interpretation Research*.¹⁸

The interpretive triangle

In the 1990s, the most advanced training programme on heritage interpretation worldwide was the Interpretive Development Program (IDP) of the US National Park Service. The IDP was rather elaborated but one challenge within the EU Lifelong Learning Project TOPAS was to think about ways to introduce heritage interpretation in a more catchy and compact way.

Different from the situation in the USA, 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)¹⁹

In heritage interpretation, triangular models are frequently used to explain similar relationships.²⁰

At TOPAS, the interpretive triangle was originally inspired by the interactive threesome.²¹

However, at TOPAS the model was also checked against the background of different approaches to interactive communication beyond the scope of the IDP, for example the concept of theme-centred interaction.²²

In the following pages, the four qualities attached to the interpretive triangle shall be used to discuss Tilden’s principles of interpretation against the background of contemporary demands.

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.²³

18 Ward, C. (ed.) (since 1996) *Journal of Interpretation Research*. Fort Collins: NAI – National Association for Interpretation

19 Ludwig, T. (2015) *The Interpretive Guide*. 2nd edn. Werleshausen: Bildungswerk interpretation, 11

20 Brochu, L. (2003) *Interpretive Planning*. Fort Collins: interpPress, 93

Gross, M. P. and Zimmerman, R. G. (2002) *Interpretive Centers*. Stevens Point: University of Wisconsin, 134

Piesssené, A. (1999) *Explaining Our World: An Approach to the Art of Environmental Interpretation*. London: E & FN Spon, 5

21 Lewis, W. (1989) *Interpreting for Park Visitors*. 5th edn. Philadelphia: Eastern Acorn Press, 22

22 Cohn, R. (1992) *Von der Psychoanalyse zur themenzentrierten Interaktion [From Psycho-analysis to Theme-Centred Interaction]*. Stuttgart: Klett-Cotta

23 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. Recently, some authors replaced the theme in the interpretive triangle by the less directive term 'meaningful experience'.²⁴

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.²⁵

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.²⁶ 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 it is an overgrown tree stump 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.²⁷ People tend to think metaphorically, connecting facts to images that have meaning for them.²⁸ 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.²⁹

The degree to which ideas or products are accepted by people mainly depends on how they are framed.³⁰ However, themes should always be seen as offers because the chief aim of interpretation is not instruction, but provocation. The interaction of participants with phenomena and interpretive media might result in meanings that are different from what an interpreter suggested. The aim of the interpreter is to reveal a larger truth and not the larger truth for phenomena can be seen in different ways.

Furthermore, framing interpretation through themes requires some awareness of responsibility, towards the heritage resource as well as towards the individual participant. The more heritage interpretation intends to connect heritage to the daily lives and decision-making of people, the more his becomes relevant. Especially at "delicate" heritage sites which can obviously be interpreted in conflicting ways, framing can easily get a political dimension.³¹

Considering that heritage interpretation often intends to encourage people to take over stewardship, which is represented in the triangle by the interpreter, it makes sense to offer especially common-interest frames triggering self-transcendence values.

How to deal with themes and the meanings they express, might be the most controversial debate in heritage

24 Buchholtz, J., Lackey, B., Gross, M. and Zimmerman, R. (2015) *The Interpreter's Guidebook*. 4th edn. Stevens Point: University of Wisconsin

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

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

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

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

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

30 Entman, R. M. (1993) 'Framing: Toward Clarification of a Fractured Paradigm'. *Journal of Communication* 43(4): 51-58

31 Lakoff, G. (2008) *The Political Mind*. New York: Penguin



interpretation. However, a trend study published by Interpret Europe suggests that two out of the five current key trends defined in the study are linked to the search for purpose – and this is what themes intend to do.³²

Turning phenomena into experiences

First-hand experiences with heritage sites, objects or sensations are at the heart of any interpretive activity. For participants in such activities, Tilden claimed

a kind of elective education that is superior in some respects to that of the classroom, for here he meets the Thing Itself – whether it be a wonder of nature's work, or the act or work of man.

The 'Thing Itself' is an old philosophical term especially related to Kant which Tilden uses in a rather casual way. Following Kant, the Thing Itself is linked to the world of the 'noumenon' which is the actual reality of an object and which cannot be grasped through individual perception. The word, Kant actually uses for the sensually experiencable, (or: what can be sensually experienced??) is 'phenomenon'. (Regarding both terms, Kant is referring to Plato.)³³

The term phenomenon had first been introduced with the EU TOPAS project in order to summarise tangible heritage sites or objects and intangible sensations (e.g. songs or dances) that can all be subject to first-hand experiences.³⁴ In different

languages, the term is also used for something which is of significant relevance.

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 (e.g. Dewey, Neill, Freinet, Decroly, Hahn, Montessori, Korczak), supported by research from authors such as Vygotsky, Maslow and Csikszentmihalyi. 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.³⁵

Education for sustainable development must share the characteristics of any high-quality learning experience, with the additional criterion that the process of learning/teaching must model the values of sustainable development itself.³⁶

Compared to formal learning, non-formal learning approaches such as heritage interpretation have significant advantages in achieving these demands.

Against the background of an increasing virtualisation and of the tendency to approach subjects (including heritage sites and objects) via computer screens, the interpretive quality of first-hand experiences should receive special attention.

³² IE – Interpret Europe (2016) European trends and developments affecting heritage interpretation. Witzgenhausen: Interpret Europe – European Association for Heritage Interpretation

³³ Kant, I. (2007) Critique of Pure Reason. 2nd edn. Basingstoke: Palgrave Macmillan – translated by Norman Kemp Smith in 1929, following the second German edition from 1787

³⁴ The UNESCO use of the words 'tangible' and 'intangible' to distinguish different types of heritage differs from the use of the word in technical literature on heritage interpretation: 'tangible concepts' denote all those concepts that refer to things and events which can be sensually experienced and 'intangible' refers to meaningful concepts behind (e.g. family or freedom). In order to avoid confusion readers should take the contexts into account. To avoid confusion, we are talking about 'phenomena', 'facts' and 'meanings' instead and do not use 'tangible' and 'intangible' in that context.

³⁵ 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> [28 August 2016]

³⁶ UNESCO – United Nations Educational, Scientific, and Cultural Organization (2008) Framework of the United Nations Decade on Education for Sustainable Development International Implementation Scheme. Paris: UNESCO Education Sector



One out of the five current key trends defined in a trend study published by Interpret Europe is search for authenticity.³⁷

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.

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.

However, when Tilden reflected on the demand for true involvement in 1957, he did this mainly against the background of visitor services in remote areas. If people decided to visit such areas, there were not many options for activities and there were not many points of view different from those the US National Park Service did offer.

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. For example, participation during an interpretive walk needs to go much further nowadays than participation at an interpretive walk more than 50 years ago – and this requires additional skills.

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.

Fostering respect for all heritage

One corner of the interpretive triangle is dedicated to the role of 'the interpreter', which is often the organisation behind the different interpretive media and therefore an advocate for the idea of the appreciation of heritage.

Remembering John Muir, who introduced the term interpretation to describe an individual process of acquainting oneself with heritage, it shall be recalled that an interpretive experience does not necessarily require an interpreter. At its best, participants are successfully encouraged to interpret heritage on their own and the interpretive media are mainly aimed to trigger and to facilitate that process.

As mentioned before, heritage interpretation is supported by different learning theories, especially those rooted in progressive education. One of Tildens's suggestions to define interpretation is to capitalize mere curiosity for the enrichment of the human mind and spirit.

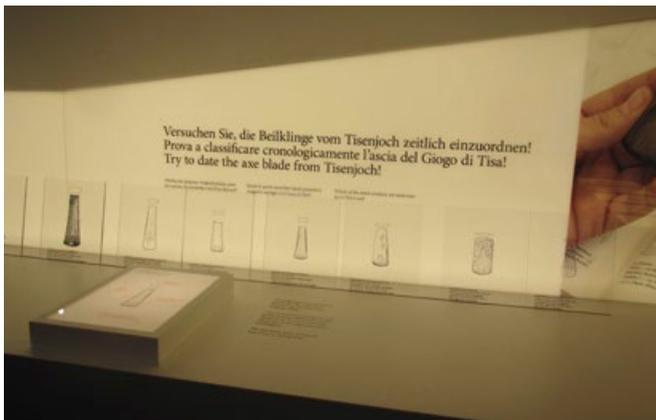
³⁷ IE – Interpret Europe (2016) European trends and developments affecting heritage interpretation. Witzgenhausen: Interpret Europe – European Association for Heritage Interpretation, 3



However, reflecting different social trends during recent decades (especially in the Western world where heritage interpretation was first introduced), interpretation is slightly swinging between the poles of

- learning as a means of encouraging individual human growth and of
- learning in order to meet external and clearly measurable objectives.

The latter can either result from heritage seen under threat (with interpreters being asked to solve the issue, including straight-forward behavioural objectives such as picking up litter), or from measuring the success of interpretation in monetary outcomes (e.g. by visitors leaving money at shops, restaurants, parking lots, etc.). In periods when economic issues get the upper hand, interpreters who see personal human development of participants in interpretive processes as their overarching goal, regularly get under pressure.



Axeblade (Ötzi museum - Bolzano)

Since some years, authors have registered an increasing economisation of learning.³⁸

This is not just limited to a direct monetary output, it can significantly influence the learning process as such – which opens another area of debate related to the role interpreters

should take. While some interpreters welcome measurable outcomes to justify their work, others feel alienated or even offended by indicators, assessments, etc. treating heritage like an economic resource.

This is especially true for UNESCO World Heritage Sites (WHS). According to the UNESCO World Heritage Convention (Article 4) each Member State recognises that the duty of ensuring the identification, protection, conservation, presentation and transmission to future generations of the cultural and natural heritage [...] situated on its territory, belongs primarily to that State.³⁹

Nevertheless, even in European States with the highest GDP there are examples where WHS have to achieve profitability and where they either are set aside or the withdrawal of their status by UNESCO is accepted, mainly for economic reasons.

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.

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

³⁹ UNESCO – United Nations Educational, Scientific and Cultural Organisation (1972) Convention Concerning the Protection of the World Cultural and Natural Heritage. Paris: UNESCO General Conference

³⁸ Spring, J. (2015) Economization of Education. New York: Taylor & Francis



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 to 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 organisations 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, it 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 organisations 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:

“The Union is founded on the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. These values are common to the Member States in a society in which pluralism, non-discrimination, tolerance, justice, solidarity and equality between women and men prevail. It can also provide opportunities to reflect on the learners' identities, beliefs and ethics.” (Article 2, Treaty of the European Union, consolidated version).

The same is true for all values and goals stated in article 3 of the EU's treaty, such as 'peace', 'freedom, security and justice', 'sustainable development', 'social justice', 'equality between women and men, solidarity between generations and protection of the rights of the child', 'respect for the rich cultural and linguistic diversity' and 'a high level of protection and improvement of the quality of the environment'.

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'.



CHAPTER 2 SUCCESS FACTORS FOR HERITAGE INTERPRETATION

David Thomas





What makes interpretation successful (or not)?

What does successful interpretation look like (or indeed sound, feel, smell or taste like!)? And how do we know when we have experienced it? This chapter builds on the earlier discussion of the principles of interpretation and examines how we might apply those principles to the end products of our work as heritage interpreters. It will consider:

- General characteristics that should be present for interpretation to be successful
- Specific factors that are relevant for interpretive planners, interpretive guides and interpretive writers to produce successful interpretation
- Tools that can be used to evaluate the success of interpretive outputs

Examples of successful interpretation will be used throughout the chapter to illustrate the topic.



Figure 1: engaging interpretation at Tintagel Castle, UK



'There is enough text here for several panels. Each section would benefit from a 'text hierarchy' of different point sizes to make it less impenetrable. Text should also be 'left-aligned' to remove the square-looking paragraphs which keep the reader out.'

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, for example by providing a lift or ramp so that all visitors, not just those on foot, can approach. 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.



Figure 3: 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



Figure 4: clear bi-lingual panel, Abisko, Sweden



Figure 5: family friendly interpretation, Conisbrough Castle, South Yorkshire, UK

- 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



Figure 6 – 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. They must also be aware of the process to follow should incidents/accidents occur.
- 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?

A series of questions 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, cultural background, but also in terms of 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 the financial return?

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



Figure 7a: More than just a panel.

- 7a. A viewing tube augments the reality of the exposed remains of Chesters Roman Fort, Northumberland, UK
- 7b. Tactile elements add to the interest and understanding of the themes discussed in panels at Tintagel Castle, Cornwall, UK

As well as these generic characteristics, there are a number of specific elements that are needed to deliver a successful interpretation plan, guided tour, or panel.



Figure 7b: More than just a panel.

What makes for a successful interpretation plan?

In addition to adequately answering the questions above, interpretive planners need to:

- Have a high level of competence in understanding the organisation for whom they are working and the context of the project for which they are producing the interpretation plan. This context may include politics, funding, internal and external stakeholders, competitors, etc.
- Have a high level of competence in project management/planning skills

What makes for a successful guided tour?

In addition to answering the questions above, interpretive guides need to:

- Have a high level of competence in communicating verbally, to different audiences – including the ability to have a conversation, a dialogue, with participants, and not just deliver messages. They also need to be aware of non-verbal communication, for example body language – both their own and their audience's – and be highly competent at using this mode of communication.
- Have a high level of competence in communicating via other senses, for example visually or olfactorily, using props and the heritage itself in order to engage and interpret for their audiences.
- Have a high level of competence in understanding the subject of their talk or tour, including an understanding of the different interpretations that exist (or have existed) of the heritage asset in question.
- Have a high level of competence in understanding the principles of heritage interpretation and an ability to apply those principles so that the tours they deliver are engaging, relevant, provoking



Figure 8: Involving the audience at Circeo National Park, Italy, Pangea Institute archive



Figure 9: using 'props' in Tyresta National Park, Sweden



Figure 10: school group has a guided tour at Stonehenge, Wiltshire, UK

What makes for a successful piece of interpretive writing?

In addition to answering the questions in section 2 above, interpretive writers need to:

- Have a high level of competence in communicating in writing, to different audiences. This should include the ability to organise content according to a clear hierarchy.
- Have a high level of competence in communicating without words – in other words: through images – to different audiences.
- Have a high level of competence in understanding the subject of their writing, including an understanding of the different interpretations that exist (or have existed) of the heritage asset in question.
- Have a high level of competence in understanding the principles of heritage interpretation, and an ability to apply those principles so that the tours they deliver are engaging, relevant, provoking.
- Have a high level of competence in understanding good design principles (if delivering panels/layouts etc., rather than just supplying copy for others to 'design').



How do we make sure that our interpretation is successful?

If we achieve the outcomes listed at the start of this chapter, then we are able to say that we have succeeded. 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’? 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.



Figure 11: Bad interpretation - crowded panel, Gotland, Sweden



Figure 12: Good interpretation panel, Patagonia, Pangea Institute archive

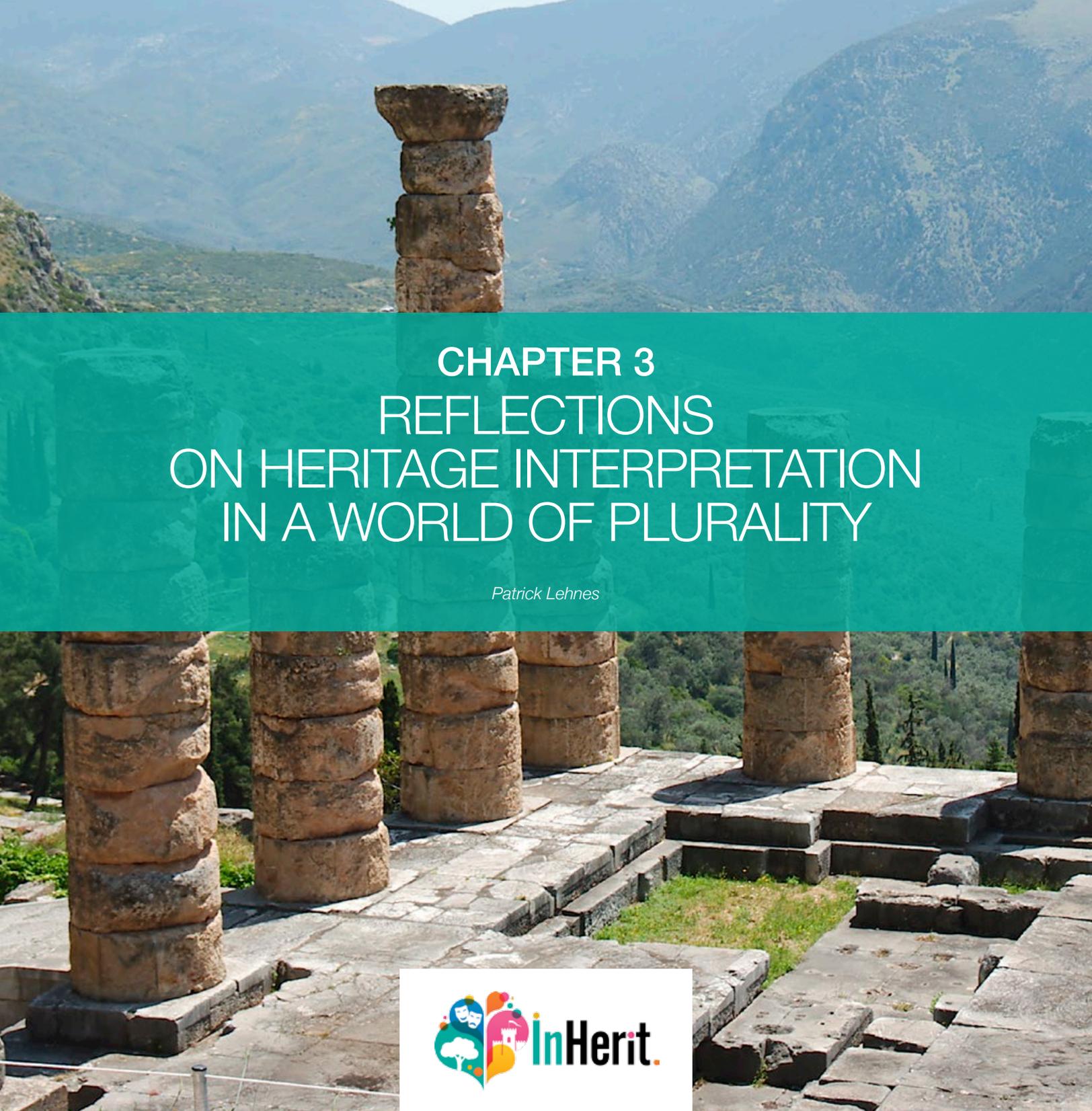


Possible evaluation techniques/tools are:

- 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
- ...

Badges

A new approach to evaluation of learning outcomes in heritage contexts are badges (e.g. Smithsonian digital badges): visitors get the opportunity to do a test – usually on-line at home – about what they learned during their visit and obtain a digital token or badge stating the competence(s) they acquired. A European badging approach involving clear learning goals, good learning through interpretation and a good evaluation would be the ultimate example of validation of learning in heritage contexts.



CHAPTER 3 REFLECTIONS ON HERITAGE INTERPRETATION IN A WORLD OF PLURALITY

Patrick Lehnés





Introduction

The previous chapters dealt with an introduction to the practice of heritage interpretation as it is – more or less – accepted within the professional field. The following pages aim to encourage reflection on the very essence of heritage interpretation itself, and then consider its potential role, or mission, within European societies.

One of the aims of the InHerit project was to embed heritage interpretation in some currents of European thinking about education. For that sake one needs to dig a little deeper for some of the philosophical roots of heritage interpretation in European or, rather, Western thinking, and related ideas about education⁴⁰.

Triggered by the composition of the international InHerit partnership, this attempt was confronted with the disturbing heritage in Poland that originated from people living under totalitarian regimes: the Nazi regime during the occupation of Poland by the German Third Reich, followed by the communist regime. This heritage is a challenge for any interpreter and, as extremes often do, it poses disturbing questions to the professional field as a whole. The following questions emerge from the fact that Hitler's NSDAP (the Nationalsozialistische Deutsche Arbeiterpartei", commonly referred to as the Nazi party) had been democratically elected by German citizens in 1933 and that so many men and women, in Germany and also in other countries, supported or at least tolerated the Nazi regime:

Could heritage interpretation contribute to learning in a way which reduces the likelihood that citizens follow anti-human leaders?

What is, or rather, what should be our role as heritage interpreters within an open democratic society, which is based on diversity and pluralism?

⁴⁰ For this question cf. James Carter (2016): It's education, Jim, but not as we know it. In: Lehnés & Carter (2016): Digging deeper - Exploring the roots of heritage interpretation. www.interpretingheritage.eu

It is obvious that we cannot find sufficient answers to this question by focusing on technical literature about effective communication skills. In order to approach this question, we must at first try to understand better what the essence of interpretation is. What did Freeman Tilden mean when he stated in 1957 that interpretation was “for the enrichment of the human mind and spirit”? We must understand what the revelation of “meanings and relationships” by an “educational activity” can mean for the mind and spirit of a person, and finally, what this can mean not only for the single individual, but for a community of diverse individuals, i.e. a modern society.



In order to understand heritage interpretation better and to reconsider its role within modern society we must look more closely at the human mind. How do we perceive things and make meaning out of them? And how do different modes of thinking that can be addressed by this educational activity relate to the competence of citizens to act within a plural and democratic community? In this respect Hannah Arendt's legacy work “The Life of the Mind” is promising for our subject – even more as it is the result of her lifelong struggle trying to understand better the total breakdown of human values under the Nazi-regime which she had experienced at first-hand. Looking back, Hannah Arendt was puzzled about the fact that not only ordinary people (but not all of them!) had followed the Nazi ideology, but also many people belonging to the educated elites (again not all of them). Even one of



the deepest thinkers of the 20th century, Martin Heidegger, whom she highly respected as a philosopher, had – at least for a while – supported this dehumanizing ideology.

These questions are not just an attempt to cope with a historic disaster that shook Europe several decades ago. Even today some people feel puzzled, observing how so-called populist movements seem to gain momentum in many Western countries by questioning fundamental values and beliefs in a way that seems to neglect reason. Baffled, not so much by the result of the Brexit vote, but by the kind of misleading arguments, half-truths and outright lies that led the Brexit campaign to win a majority of votes, the Australian-British historian Christopher Clark reluctantly concluded:

“Sadly, men are so stupid that they rather do not learn from history; they only learn from stories which they experienced themselves.”⁴¹

Reflecting on the relationship of heritage interpretation and education to the human mind and spirit is therefore more than a purely academic endeavour, but something that might turn out to be highly relevant to European and Western societies of the 21st century.

The following considerations are a tentative attempt to address this relationship. They are based on a small study published as an electronic paper in the course of the InHerit project⁴². It is not meant as a mature and coherent theory of interpretation – and in the end it could be questionable

⁴¹ Original quote in German: “Ja, leider sind die Menschen so dumm, dass sie von der Geschichte eher nicht lernen. Sie lernen nur von den Geschichten, die sie selbst erlebt haben” in the German radio programme of Deutschlandfunk (29.06.2016): URL: www.deutschlandfunk.de/folgen-des-brexits-leider-sind-die-menschen-so-dumm-dass.694.de.html?dram:article_id=358602

Christopher Clark is the author of the book: *The Sleepwalkers: How Europe Went to War in 1914*

⁴² see Patrick Lehnés (2016): “It’s philosophy, Tim, but we love the world” in the e-book: Lehnés & Carter: *Digging deeper - Exploring the roots of heritage interpretation*. www.interpretingheritage.eu

The following sections of this manual chapter do without footnotes and references which would otherwise interrupt the flow of thinking. The e-book studies take a different approach and discuss the topic in a more academic way. All quotes are from Hannah Arendt: *The Life of the Mind. Thinking*. Harvest, San Diego, New York, London, 1978 [1971]; and Freeman Tilden: *Interpreting our Heritage*. The University of North Carolina Press. Chapel Hill, 1977 [1957].

whether such a final theory was desirable at all. It is rather an interim result, largely inspired by Hannah Arendt and reflections on what her legacy can mean for a deeper understanding of heritage interpretation in relation to society.

The approach here starts from the experiences of two hikers who encounter natural and cultural heritage. It reflects upon these experiences as they evolve during their hike to the summit in order to approach what can be considered the heart of interpretation – at least from the perspective of Hannah Arendt’s work. The final section will then draw some conclusions for heritage interpretation in the context of the pressing questions which follow from Christopher Clark’s remark. As it sometimes happens, hikers who take a shortcut risk to miss essential views.

The primacy of appearance

A man invites a woman, a friend living in another city, for a walk uphill to a castle ruin. Halfway they reach a viewpoint above a rock. They sit down on benches and enjoy the view. The woman looks out over the valley where a road leads up through meadows and pastures to a pass between two hills. At the pass something stands out in solid grey from the green slope, but she cannot recognise what it is. Looking around, she notices two butterflies fluttering from flower to flower. She is delighted to see a martagon lily next to the trail.

The man looks down the valley. He sees a solitary farmhouse on the other side of the creek which is built with its rear wall against the slope. Somebody is walking down a forestry road through the meadows and approaching the farmhouse from the back. Then the man looks at his hiking partner and notices the delicate, sweet fragrance of her perfume. He follows the direction of her gaze and sees a flower which has blossoms with an unusual shape: its petals are bending backwards. “A Turks’ cap Lily” the woman tells him. His curiosity is stilled as she gives him a name for the unknown flower.



Both of them would not doubt for a second that the things they see, hear and smell are real. In our everyday mode of common sense we take things which we perceive while we are awake as a reality. But many philosophers and scientists have questioned whether what we perceive is actually the real world or only a subjective representation of something else. Is what we perceive a mere illusion created by our senses? Isn't what the man smells a result of a biochemical process and isn't the colour of the flower in reality an electromagnetic radiation which only appears because of his sensory apparatus? These are important questions for anybody who wants to understand what we do when we interpret natural and man-made phenomena.

And indeed, in our plot the man and the woman see the lily differently. For him the red tones of the blossom do not differ from the green tones of the leaves and the grass. He has inherited a malfunctioning of the green receptors in his eyes which causes red-green colour blindness. Furthermore, what appeared to him as the smell of the woman's perfume was a deception. It is the fragrance of the martagon lily. It is obvious that we cannot totally rely on what we perceive.

Long ago, Greek philosophers said that what we perceive are only particular instances of general ideas, e.g. "flower" or "house". The idea or concept is the common entity which appears through these particulars in our physical world of space and time. All these particular things in space and time have accidental properties, while the idea which all particulars of a kind have in common is their true essence. In other words, concepts and ideas have been considered as the metaphysical ground of all things that appear. Plato and other philosophers conceived the world of ideas as invariable entities beyond space and time. Thus the "thing in itself" was considered to belong to a higher reality, and from such a point of view the particular appearances seem mere semblance.

Those philosophers are right in that each singular object appears from a different perspective for every individual. Even if the man was not colour blind, he could only see the flower as it appears to the woman from his standpoint at

that very moment. Nevertheless, perceiving the world from a standpoint in space and time, i.e. seeing it only from a limited perspective, does not destroy our feeling and firm conviction that what we experience is part of the same real world in which we also take part.

Furthermore, the man's error that the smell appeared to him as the woman's perfume did not destroy his sense of reality regarding the whole situation. He realised this misperception (or misinterpretation where the fragrance originated from) when he stood up and changed his standpoint. And the woman's inability to identify the grey thing next to the pass does not raise any doubts regarding the reality of all the other things she perceives.

According to Hannah Arendt a threefold commonness guarantees for us the reality of the things we perceive:

First, it is that we can perceive them with our totally different senses which fit together. We see the flower, we can smell it, we can move closer and touch it, we can see the cows, hear their "moo" and their cowbells etc. It all fits together.

Secondly, the world does not appear to a solitary subjective individual only, but it also appears to other human beings. In spite of their different perspectives on things, they confirm the reality of those objects. The woman and the man can talk about the flowers. And the farmhouse they both see beyond the creek is the same house which the other person who approaches from its rear-side will reach soon, despite the fact that the house, from that other person's perspective, appears very different.

Thirdly, even animals with very different senses who may perceive things in a fundamentally different way, confirm the existence of those things through their behaviour – such as butterflies visiting the flowers. In an absolutely dark cave, we can perceive the walls only by groping or banging our heads, while flying bats obviously perceive the same walls in a different way without needing to touch them.

The sense of reality relates to the worldly contexts in which



single objects appear for us. The castle ruin on top of the hill, the electric fence and the cows in the meadow, the farmhouse, the creek in the valley, the road leading up to the pass etc., all make sense, or better: the whole situation does not contradict what is a possible world according to the hikers' experiences.

This context fits into our own changing context as a living person with the faculty to perceive while we move through the world. We act and see other creatures acting and reacting with things that appear to our senses. The spatial perspective has changed for both the woman and the man as they hiked uphill to the top of the rock. At the same time they felt this activity as an effort in their muscles, their breath quickening etc.



Although one element or another might turn out to be a deception, this intuitively sensed coherence of the whole situation grants us the feeling and conviction that the things are real. At the same time, philosophers and scientists are right in that it is impossible for us as living beings on earth to perceive a single object simultaneously from all its aspects. It is similarly impossible that the context of things as well as our own context ever appears to us in full.

Even a philosopher who is intellectually convinced that all sensual experience is mere illusion will sit down and rest on the illusion of a bench rather than walk over the cliff. He also

knows that falling down the rock face would have a real, fatal effect. And at home the researcher eats potatoes and salad rather than protons, neutrons and electrons. The world of tangible things is the reality we experience at first-hand as creatures who have been born into this world and who will leave it when we die.

These considerations are highly relevant for our question regarding the role of heritage interpretation as an educational activity in a plural society. It is first-hand experience which provides us with a strong sense of reality. First-hand experience reaches much deeper than abstract historical knowledge; it comes together with our sensation of personally taking part in the real world. In this respect, Christopher Clark's disappointed remark, that men only learn from stories which they experience themselves, is much more meaningful than it might seem at first sight. People may have a lot of knowledge in history or biology, but what counts in the end is the overwhelming sense of reality based on their own first-hand experience. For the same reason the solipsistic philosopher does not walk over the cliff despite his intellectual convictions that all perceptions are nothing but illusions.

This thought might have consequences for our approaches to education.

In contrast to many forms of formal education, heritage interpretation can and should always capitalise on the first-hand experience of original objects. Visitors then relate their own reality to that of the object through their perception of the thing itself and its perceived context. Even if an object in a museum has to be displayed in a showcase, one can perceive its three-dimensional existence, seeing it from changing perspectives while approaching and moving around it. Furthermore, original objects which are perceived in their original spatial context, i.e. in their authentic place and environment, can provide an even stronger sense of reality regarding history or nature. While walking through the environment of the historic thing or through an entire ensemble the person connects more intensely with the place and its "theme".



A highly didactic classroom lesson, or an excellent documentary film on TV cannot fully replace such first-hand experiences of the real thing and/or the real place. It makes a difference for our sense of reality whether we sit in our living room in front of a TV screen and see spectacular scenes of wildlife action such as a hawk moth pollinating the Turk's cap lily – which we could hardly ever observe by ourselves in such detail – or whether we are really there, walking in nature, and then see and smell the real lily in its real environment.

We can draw a first conclusion from the above considerations: heritage interpretation can play a crucial role within the larger field of education by linking learning with the learner's deeply felt sensation of perceiving an aspect of the real world. In this respect heritage interpretation based on first-hand experience plays an important complementary role to other forms of learning which are mainly based on second-hand experience communicated by a teacher or through media.

Of course, this does not imply that one should avoid media in interpretation. Any interpretation also relies on second-hand information provided by an interpreter in person and/or through media; the internet plays a decisive role in marketing of interpretive services; virtual reality can add to the learning experience. All this can and should complement, but not replace, the unique value of the visitors' personal experiences of the real thing and the real place.

First-hand experience is the most basic and fundamental way to relate heritage and history to a person's reality. This is one of the assets which heritage interpretation contributes to the wider field of general education.

Generic concepts and the diversity of particular things

What we perceive as a reality with our senses always depends on our standpoint in space, our position in time and the perspective we focus on. Another person cannot perceive the same thing from exactly the same space-time perspective. But such sensual perceptions are often very similar for different people, especially if the thing we focus on and its context do not change quickly, for instance because they are preserved as heritage.

However, if we follow our story we will find out that there is another dimension which is crucial for our perception of the real world.

The man perceived 'flowers' when he looked towards the flowers and a 'farmhouse' when he looked to the house on the other side of the creek. His perception differed from that of the woman, not only because of the marginally different angle of view, not only because of his red-green colour blindness; he saw a flower, but he was puzzled by its unusual blossoms that bend back their petals, while the woman immediately saw a 'martagon lily'.

When we perceive tangible things with our senses in our normal common sense mode, we do not have to think what these forms, colours and structures, these haptic sensations etc. mean, but often we immediately recognise the thing. But what we perceive has to do with the concepts we have readily available. The man does not know many different plant species, but he has the concepts of 'flower', blossoms and petals available. Thus he could not recognize the martagon lily, only a flower.

The woman, who is obviously more familiar with plants and



insects, has got more differentiated concepts that allow her to recognise different plant species; she saw a martagon lily. When we perceive things, then the object is constituted by both the impression on our senses and the concept we associate with it. The sensory appearance and the realisation of a fitting concept coincided for the woman in an instant, without any conscious thinking activity. For the man the same happened with regard to 'flower', but then his interest was briefly aroused as he realised that his particular flower was somehow special: it was different from other flowers. He grasped a new concept of flowers with the special feature of hanging blossoms with petals bending backwards.

Through his wondering, which presupposes a comparison with his vague inner image of typical flowers, i.e. a mode of thinking, he had already shaped a new, initial concept of this special flower: a particular kind of flower with distinctive features.

Then the woman gave him a name for the special kind of flower he was looking at: "Turk's cap lily". His mind attached this word to the new sub-concept of 'flower', thus adding it to his vocabulary, i.e. the language they both share. She could also have told him another available word for the same concept, "martagon lily", or the scientific name of the plant species "Lilium martagon L."

As soon as he was given a name for these special flowers, he stopped marvelling.

For heritage interpreters it is important to understand this effect. Curiosity can significantly drop as soon as an unusual thing is named. Giving it a name is like giving an answer, and often such an early answer can provide enough satisfaction for many visitors. Interest declines, the visitors' sense of marvel at the real phenomena vanishes. But a word is only a symbol we use to denote the concept. If one stops exploring the phenomenon too early and curiosity is not aroused again, then the learner's new concept will remain thin and its meaning blurred.

For the woman the concept of martagon lily is much richer

and more differentiated than her partner's. She would also be able to recognise a Turk's cap lily when the blossoms have not yet opened. She knows where the nectar is hidden in the blossom. And she knows about the relationships of this flower to other things, e.g. to specialised moths that need sophisticated abilities in order to reach the nectar and pollinate the flowers. Thus the concept of the martagon lily, as she has acquired it, is linked to other concepts she has available in her mind. It is richer and more meaningful.

As a consequence the same lily appears differently to the man and the woman, not only because of their different visual apparatus (colour blindness) and the slightly different spatial perspective from which they see the plant; the most important difference is their different mental "standpoints", i.e. the more or less differentiated conceptual system they have acquired in the respective area of biology. Notwithstanding this difference in their physical and mental perceptions they are both firmly convinced that they refer to the same things in the same real world.

For the woman then the unexpected occurs: she sees a butterfly land on a blossom of the Turk's cap and drink nectar. This contradicts her understanding of what makes the martagon lily special; to her knowledge the vertically hanging, rather smooth petal leaves would not allow a butterfly to hold its position on the flower. This contradiction with what she expected bothered her and aroused her interest again. Only after she examined what had happened, she realised the blossom did not hang vertically but at an angle. This particular real-world instance of the Turk's cap lily did not exactly fit her previous concept of this species. Her concept adjusted to make it fit again with her new real-world experience. The vertically hanging blossoms are still a characteristic feature of the martagon lily, but they are not a defining feature. In the real world we can be confronted with exceptions which do not match the ideal-typical preconceived concept.

All this happens to the man and the woman in their everyday common-sense mode. With their consciousness they are out there in the world; they are at and with the things. Most



perceptions, i.e. sensory impression and the association of a fitting concept, occur so quickly that one rarely becomes aware of these processes. Even the process of adjusting a concept according to a new real-world experience can happen so fast that we do not fully realise it. The woman did not ponder the definition of the concept she had of martagon lily, the adjustment just happened.

The great value of real-world experience is not only the deep sensation of reality, but it also challenges preconceived concepts. The real world is most diverse and by confronting our ideas and concepts with real world experience they will become more differentiated and refined. In turn, this will result in more precise and more differentiated future perceptions when similar things appear to our senses, triggering the association of richer concepts.

Classroom educators have to facilitate the acquisition of general concepts; in order to introduce such new concepts teachers usually illustrate them through ideal-typical examples or abstract models. However, concrete reality does not always appear in the ideal-typical manner but in a variety of forms.

There is a saying in German: “Man sieht nur was man weiß” - one only sees what one knows. But at the same time, as we have seen above, the opposite is also true: one only knows what one sees (or rather what one perceives).

Heritage is about significant natural or man-made things, persons or events that appear or have appeared as particulars in space and time. Because heritage things are special they often challenge us to adjust our preconceived general concepts and ideas. This ability is closely related to the ability to overcome prejudice – a key competence in plural societies. At heritage sites people can train this ability even in the common-sense mode of mind which deals with tangible things and their physical relations. In other words, the educational activity of heritage interpretation can and should facilitate such learning processes.

Within the field of general education heritage interpretation

offers great opportunities for lifelong learning beyond general education at school. We will see later that the lifelong provocation to challenge one's preconceived concepts and ideas can play a crucial role for democratic societies.

Concepts beyond what we can perceive

The protagonists' common-sense mode of consciousness is entirely “out there in the real world as it is given to us by perception”. What we, provided you are following, are doing is a different mode of thinking; we discuss such common-sense experiences from a meta-level, an activity every interpreter is probably familiar with.

We have mentally jumped from the man's physical and mental standpoint to the woman's and back; we have tried to imagine how they perceive the world from their different perspectives. A good heritage interpreter, as any good educator, is well trained in changing from his or her own mental perspective to that of another person. Otherwise he or she could easily fail in the task of facilitating learning which is meaningful for those to whom the interpretive service is offered.

But before we enter the field of meaning making from the perspectives of our protagonists in order to discuss its significance for lifelong learning, we need to look more closely at the mode of scientific thinking.

Scientific thinking: invisible parts and explanation of things

The man suggests they continue their hike to the castle ruin. He is more interested in cultural heritage. Just before they reach it, at the rock underneath the ruin, they see a large rock shelter. A panel informs them that this is a Mesolithic site where



archaeologists found the remains of a camp which had been used by a group of hunters: organic material and stone blades which were dug out from the clay layers. Radiocarbon data revealed that the camp dates back to around 8500 years BC.

The man and the woman can perceive no more than the clay floor and the overhanging rock which opens towards the valley. They cannot see any visible trace from the early hunters who used this shelter. All information about the people who lived thousands of years ago comes from reading the panel. Nevertheless, neither of them doubts that this information is true because it claims to be based on scientific evidence.

By separating things, inorganic and living things, into their parts and investigating how these parts function, modern science has crossed the limits of our human common sense perception. Scientists developed new concepts such as atoms and isotopes and investigated relationships between them. No human being will ever be able to perceive them directly with the senses. Nevertheless, all these relationships, i.e. hypotheses and theories about physical laws, chemical knowledge etc. must be connected to the world we can perceive, if we want to prove their reality. Researchers build instruments for experiments based on a hypothesis, and then they predict a result, such as data on a screen, in order to test or falsify the hypothesis.

This happens in the realms of science, in laboratories or field work. Only few witness the experiment first-hand and even fewer fully understand the often complex theories which are implied in the set-up of the experiments, including understanding all the details of how the instruments function. Modern science is highly specialised and to a large extent based on mutual trust in the findings and truthfulness of other scientists. Therefore the scientific system has established sophisticated systems of intersubjective control of research findings. Nevertheless, trust in the published data of scientists and their theories about the non-perceptible reality, probably would still be rather weak if we had no other evidence. But engineers successfully use this knowledge about the invisible, e.g. wavelengths of light and electric currents, to create new man-made things which we

can perceive with our senses, such as solar panels and lamps. In general they function as predicted when we use them. They become part of our common sense reality.

Description and explanation

In the case of the archaeological site, science was used to explore data and facts which are beyond what we can see. The panel mainly describes things and facts of what happened a long time ago at this very place. If we had been there at that moment we could have seen the scene with our eyes, and we could have heard the people talk in their language. But all this has disappeared. Descriptions bring things and events to our imagination. As long as a panel or a guide only describes, vividly describes, what happened in the past, it does not go beyond what we could have perceived as external spectators.

The same is true for reconstructions and re-enactments of the past. The local museum could display a diorama of the hunters' scene under the rock shelter, or it could re-enact the hunters' preparation of weapons and furs with stone blades through first-person interpretation. These "stone age hunters" might even involve visitors in their performance; the visitors will still remain foreign outsiders, and they will always be aware that what they experience is only a play and not real life. Reconstructions and re-enactments are a means to help visitors to imagine more precisely and more vividly. But these imaginations are not sensed as reality. That's evident when one thinks about an extreme example: taking part in the re-enactment of a historic battle is fundamentally different from taking part in a real battle with really injured people, real corpses and the real threat of losing one's own life.

The imagination is to a much lesser extent felt as real than what we experience first-hand. Nevertheless, a vivid imagination of the situation elsewhere in space and time can be an important precondition for the development of a feeling of empathy. And heritage interpretation anchors this imagination in our real-world perception by linking the imagined past to our first-



hand experience of a site. The imagination and the feeling of empathy resulting from it, becomes more powerful. The panel aroused only a vague imagination of the prehistoric hunting. But the two hikers still see and touch the overhanging rock, they see the clay soil, the real context which the prehistoric people used for their camp.

Nevertheless, imagination, aroused by description, reconstruction and/or re-enactment, is only a substitute that compensates our inability to perceive ourselves what appears elsewhere in time and space. Neither mere perception nor imagination, regardless how vivid it is, do necessarily come with understanding.

But beyond these descriptions, the panel also explains briefly how those people made blades for their weapons from flint stone. Furthermore it explains how the factual information has been gained, based on scientific data such as radiocarbon dating. The latter makes the information more credible, but it also distracts visitors from their imagination of the past scene. It is, however, a matter of good practice to make the scientific basis of an interpretation easily available, e.g. through the internet, for visitors who are interested in the factual basis of the interpretation.



Physical explanations deal with the functioning and interaction of things and their parts. It deals with the causes and effects that change things and their contexts. It generates

knowledge. Science extends this way of explanatory thinking from the tangible world of common sense (in this case, the making of stone blades) to the world of invisible parts (in this case, radiocarbon dating) – We can call the latter the sub-tangible world. However, the scientific mode of thinking is still rather similar to the common sense mode. Like us, the scientist is normally with his consciousness “out there” in the world of things, objects and their interactions.

Heritage interpreters normally master advanced communication skills which enable them to explain scientific findings in a way which non-scientists can understand. Such visitor-tailored explanations can satisfy visitors’ curiosity regarding the question of how our natural and man-made world functions, and they also provide information about things which we cannot experience first-hand due to our place in space and time. Through imparting knowledge on factual, scientific information, interpreters can also contribute to lifelong learning.

Intangible meanings: the essence of interpretation

However, if we follow Tilden, then neither description nor scientific explanation is the essential aim of heritage interpretation, although all interpretation is based on factual information. He first defined 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.”

In order to avoid misunderstanding, he offered another concept which “is more correctly described as an admonition, perhaps: Interpretation should capitalize mere curiosity for the enrichment of the human mind and spirit.” And Tilden offered a third attempt to hint towards what he means: “Interpretation is the revelation of a larger truth that lies behind any statement



of fact.” And still another attempt to indicate the direction of what he means with interpretation: “the work of revealing (...) something of the beauty and wonder, the inspiration and spiritual meaning that lie behind what the visitor can with his senses perceive.”

It is obvious that in his book from 1957 Tilden struggled hard to find appropriate words to express what he meant while “ploughing a virgin field so far as a published philosophy of the subject [heritage interpretation] is concerned”.

So let’s follow our two hikers up to the summit where they reach the castle ruin, and let’s explore meanings that lie behind what visitors can perceive with their senses and behind any statement, or explanation, of facts.

At the entrance gate to the ruin they find an old-fashioned panel that provides a lot of factual information about the castle: the date when the oldest part was built and the dates when it was extended, the names of the noble families who lived there, the date when the castle was destroyed. It also gives information about the significance of this site which is protected by state law. The ruin is listed as an architectural monument “due to its rare combination of Romanesque and Gothic architectural elements”.

The hikers do not bother to read all the information; most of it is meaningless to them.

But the man, who loves this place and has read a lot about the former castle, tells his friend what he finds significant: that a regional noble family lived here. While they believed in the virtues of knighthood, they also engaged in bloody feuds as they tried to secure their power and widen the territory under their control. The only son, who was supposed to inherit the castle and its lands, followed the call of the Pope and joined other knights on a Crusade to liberate Jerusalem. This venture was very expensive and the family had to pledge significant parts of their possessions. Fighting for his highest beliefs in the Holy Land, the knight lost his life. Some years later the castle fell to another knight who held the pledge. The

new owner neither respected the old rights of the serfs, nor the town charters that had confirmed the freedoms of town citizens. In order to end the oppression, town citizens and farmers joined forces, attacked and killed the last knight of the castle. In anger and revenge they set the castle on fire. The new lord’s family had to flee their hide in the belfry, which one can still see today, and was driven away by the angry insurgents. For several weeks the villagers and the towns governed the territory themselves until the Duke’s army took over and established a local administration of civil servants in the main town. The castle was never rebuilt. This event is considered as one of the earliest instances of liberation and self-government in the country.

The woman asks whether engaging in feuds and killing other people did not contradict with the virtues of knighthood. This question opens a discussion on the virtues of medieval times...

It is obvious that, from the perspective of the man, the ruin is not significant because of its Romanesque and Gothic style elements. The latter might be meaningful for an arts historian for whom these concepts are much richer, with relations to meaningful ideas. From the man’s mental perspective the ruin matters in terms of struggles for liberation, resisting oppression and injustice, and the tragedy of the lords’ families. And his partner’s interest is aroused by what seems to her to be contradictions in the meaning of knights’ virtues in her own preconceived understanding.

This story about the castle’s history uses a type of concepts that belong to a sphere different from those we considered before: ‘liberation’ and ‘oppression’, ‘justice’ and ‘injustice’, ‘virtue’, ‘religious beliefs’ and ‘holiness’: these words point to concepts which do not refer to tangible things human beings can perceive with their senses. They are also substantially different from those things that interact physically but are not perceptible by human senses which we called sub-tangible. They do not belong to the physical world of common sense, science and technology which can be scientifically tested and proved. They belong to the sphere of *intangible concepts*.



Strictly speaking, all concepts are intangible, also the concept of 'flower', which must be distinguished from the particular flower which appears in the physical world. The expression 'tangible concepts' is an abbreviation for 'concepts that refer to tangible things and processes in the physical world', while 'intangible concepts' refers to entities which do not belong to this physical reality. For human beings these intangibles are in a deeper sense meaningful than tangible and sub-tangible concepts, which denote material things. In philosophical terms we talk about 'metaphysical' ideas.

Scientific thinking explains how the tangible world of common sense things functions, which can include sub-tangible causes and effects. But *interpretation* moves in the other direction: it refers to what a thing, an event or an act of a person means. In other words, interpretation relates the physical appearance to these intangible concepts and ideas which are meaningful for human beings. The educational activity of 'heritage interpretation' facilitates the meaning making with regard to particular heritage sites and collections. It makes first-hand experience accessible, it facilitates imagination of the past and it may provide explanation. But *interpretation in the narrow sense begins at the level of intangible meanings*. Interestingly, intangible concepts and ideas like these were just as relevant to the ancient Greek thinkers and to people in the Middle Ages as to modern people. And many of them are meaningful for people regardless their very different cultural backgrounds. Some philosophers therefore call them 'universals', an expression which is also used in the field of interpretation.

Intellect versus reason

Hannah Arendt, referring to Kant, shows that different modes of thinking refer to these different spheres. Science produces knowledge about the tangible and sub-tangible world which can be tested. A scientific statement can be falsified through contradicting data, i.e. perceptions in the physical world which are accessible for our senses. Common sense and science rely on the *human intellect* (that's the common translation of

Kant's use of the German word 'Verstand'). It denotes the analytic capability of discerning things which appear in space and time, and of explaining physical causes and effects which connect these things. We can call the corresponding activity of the mind 'intellectual thinking' through which we can explain the physical side of the world – or anything which we imagine in analogy to the tangible and sub-tangible things.

This does not apply in the same way for meanings of intangible ideas. They do not provide knowledge. We apply intangibles when we make sense of something. Kant uses the German word 'Vernunft', which is usually translated with 'reason', for this faculty of the human mind which is capable of meaning making. However, these words are a bit tricky because both 'intellect' and 'reason' are often used as more or less interchangeable synonyms. In our context they mean very different thinking modes of the mind. For interpreters this substantial differentiation is significant, regardless which words are used to denote these different modes of the mind. Most intangible ideas are also loaded with value. All the values on which the European Union is founded according to Article 2 of the Lisbon treaty belong to the sphere of intangible concepts: respect, dignity, freedom, democracy, equality, the rule of law, human rights, pluralism, non-discrimination, tolerance, justice, solidarity.

We designate natural or cultural things as 'heritage' and protect them because they are considered in some respect as significant. Therefore heritage, beyond functional explanation, usually bears the potential for interpretation, which sheds light on deeper meanings of the significant thing and significant place.

These considerations can help to better understand Tilden's third principle which seems to pose difficulties for many interpreters: "Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable." Interpretation is much more than mere artisan craftsmanship of communication techniques. An interpreter needs to develop the art of finding and revealing meaningful perspectives which



shed new light on what we perceive with our senses and on the facts which scientists have established. Of course the interpreter as an artist must master his communication tools and skills.

The art begins where the story is shaped by arranging perceptible phenomena, facts and explanations in a way that inspires human meaning making.

At this point, the question can arise here whether this is just l'art pour l'art (art for art's sake).

The power of intangible concepts

In order to illustrate the strength of the urge of people to associate themselves with the historic past, Tilden uses an unusually long quote. It is not the dates and names that drive the desire, but, as the quote reveals, it is the making of a connection with such intangible ideas. Tilden quotes C. E. Merriam's book "The Making of Citizens":

"The underlying design is of course to set up a group of the living, the dead, and those who are yet unborn, a group of which the individual finds himself a part and of which he is in fact glad to count himself a member (...). All the great group victories he shares in; all the great men are his companions in the bonds of the group; all its sorrows are by construction his; all its hopes and dreams, realized and thwarted alike, are his. And thus he becomes although of humble status a great man, a member of a great group; and his humble life is thus tinged with a glory it might not otherwise ever hope to achieve. He is lifted beyond and above himself into higher worlds where he walks with all his great ancestors, one of an illustrious group whose blood is in his veins and whose domain and reputation he proudly bears."

All the greatness, the glory, the "higher worlds" point to the sphere of intangibles. Intangible concepts and universal ideas resonate with something inside us. They are not as cold

as intellectual thoughts tend to be, but they touch human emotions.

Tilden adds to the quote that:

"generally speaking, certainties contribute toward human happiness; uncertainties are a source of spiritual loneliness and disquietude. Whether or not he is conscious of it, Man seeks to find his place in nature and among people."

Intangible concepts and universals provide orientation in the mental and spiritual sphere.

If people in Europe could experience that the European Union was really founded on the values which are stated in Article 2, then the EU might not find itself in such a deep identity crisis. General education could certainly play a more significant role in connecting the idea of a European Union more intensely with the sphere of intangible meanings. General education in this sense would aim for the development of the personality which should be distinguished from instruction imparting knowledge and skills which one needs for employability and workaday life. And heritage interpretation, as a discipline within general education, could link powerful intangible ideas with the power of reality that people experience first-hand in combination with trustworthy scientific findings.

In some respect heritage interpretation reconciles the inheritance from the Enlightenment with that from the Romantics. On the one hand it is based on first-hand experience and scientific explanations, on the other hand interpretation responds to the urge for deeper meaning, for what makes sense beyond the ordinary usefulness.

However, in the 21st century interpretation must not stop with such revelations and affirmations of deeper meanings and relationships in the intangible sphere. The certainties which interpretation creates can surely contribute to happiness and a sense of belonging. But the power of such intangible concepts and the feeling of becoming uplifted can also turn out to be very dangerous.



For Hannah Arendt it was most puzzling that Adolf Eichmann, who organised the transports to Auschwitz, did not appear to her as a kind of monster, a spawn of evil. Instead, Eichmann appeared as a rather average man who, and this was the unsettling observation, just did not think. This statement might come as a surprise. Eichmann was certainly an intelligent person who was so knowledgeable and skilled that he was able to efficiently organise the demanding logistics of large-scale industrial mass murder. But his knowledge, skills and intelligence did not lead him to reflect on the meaning of what he was told to do.

In the context of the quotation from “The Making of Citizens”, a disturbing question emerges: could it be that Eichmann felt good because he believed in belonging to a “great group”? Did he believe that “good Arian blood” was flowing through his veins, so he belonged to a group which he had been told was superior to all other races? The Nazi ideologists, after all, made extensive use of intangible concepts. They re-interpreted history in order to support their ideology.

Meaning making can be powerful. Meaning making can be very dangerous. And meaning making can indeed have disastrous impacts. On the other hand, one cannot ignore the human desire for meaning.

Reflective thinking: the aim of modern interpretation

Let's go back to the friends enjoying their day out at the castle ruin. We remember, capitalising the woman's mere curiosity about the castle, the man interpreted what the castle meant to him. While they experienced the ruin with its still standing belfry, he told his interpretive story based on historic facts that linked the place with intangible concepts such as oppression, liberation etc. For our question the important thing is that the man, by

mentioning the ‘virtues of knights’ and ‘bloody feuds’ stimulated the woman to question the coherence of the meanings.

They begin a short dialogue about the virtues of nobles in medieval times; the man points out that bravery in fighting was considered a very high virtue for the knights, as well as generosity and restraint. She answers that today this seems to have changed for many people. For her, ‘restraint’ and ‘bravery’ which involves killing do not match. Then they leave this topic and decide to have their picnic.

Later, when they hike down the hill towards the pass, she begins to reflect about ‘bravery’. Is it a virtue in itself, or could it be something negative in certain contexts? It seems evident to her that a brave fire fighter does something good, but what about the bravery of wing-suit jumpers who risk their lives for nothing? Or perhaps not for nothing. The base jumper enjoys the adrenaline kick, and maybe even more the admiration from his friends. But isn't this plain vanity? And how ‘brave’ is a man who takes the risk to attack two rich but obviously strong men in order to rob them?

There is a difference between the woman's thinking while she is engaged in the dialogue with her friend and her reflections while walking. In dialogue with someone else, we usually jump back and forth between our own position and perspective and that of the dialogue partner while checking what we agree or disagree with. In good and open dialogues we listen to the other in order to understand his or her perspective. Our consciousness iterates between the other person ‘out there’ and our own preconceived concepts, ideas and beliefs, i.e. our own mental position. We engage in *dialectic thinking*, ready to adjust our own understanding of the issue.

However, it often happens that a dialogue is not so open: we try to persuade the other that our own convictions are right and we want to defend our standpoint. Then we also use our thinking, but not in an open-minded way. We quickly check which of the other's arguments we rather ignore and which ones we can attack by a counter-argument. We can call this activity *persuasive thinking*.



But when we engage in true *reflective thinking*, we are in a silent dialectic dialogue with ourselves. It is our self who answers; it is our second inner voice who checks the coherence of a thought with our own preconceived concepts and ideas. This is a fundamentally different state of mind. We do not jump back and forth between the outside world and our standpoint but we are entirely with us. We try to integrate a new or revised concept coherently into our inner cosmos of intangible concepts and ideas which is multiply connected with our inner treasury of experiences and knowledge.

This inner self we talk with in reflective thinking, is the one who awaits us when we come home, as Socrates put it; it is the one with whom we have to come along after we act in the world or talk with others. It is our conscience.

In reflective thinking we consciously interact with our conscience. We cannot cheat ourselves while active in this mode of thinking. Otherwise we would consciously contradict ourselves which is not quite possible. We would deliberately try to betray ourselves while we are conscious of this betrayal. But a betrayal cannot work if it is done in full openness and obvious to the one who shall be betrayed. There is only one way of escape: to stop reflective thinking.

It is evident that Hannah Arendt, when she wrote that Eichmann did not think, she did not refer to the use of the intellect, but she meant that he did not engage in reflective thinking. Without this type of thinking, avoiding the “quest for meaning” as she put it, a person can perfectly live and act without conscience. But before we discuss the consequences of such a lack of reflective thinking, we need to look more closely at some of its characteristics in the context of intangibles and meaning-making.

Reflecting on the meaning of intangible concepts and their relationships to other intangible concepts is pure thinking. The meaning of one concept is illuminated through its relationships to other concepts and ideas. This reasoning about universals and other intangibles is an extraordinary state of mind. The thinking person is with his or her consciousness not “out

there” in the world of things, objects and their interactions, but entirely in the sphere of concepts and ideas, which is beyond the ordinary reality of space and time.

Many who engage in reflective thinking about intangibles experience that this activity does not necessarily lead to clear-cut answers. But it can clarify our preconceived concepts and identify misconceptions. It can broaden the mental or spiritual horizon, but at the same time thinking almost inevitably produces new questions – which then destroy other preconceived certainties. Thus the quest for meaning may arouse the urge to examine more of our concepts in order to discover inner contradictions with other concepts and their relationships.

At the same time the silent dialogue with oneself is felt like an awakening, a pure activity. In the process of reflective thinking concepts become fluid, they can change and adapt to their “conceptual environment”.

What remains from this thinking activity is a thought, a fixed relationship between concepts which might have changed their shapes, i.e. their meanings. Such a thought, as well as other available concepts, can be compared to frozen shadows of the active thinking process. Consequently, when reflective thinking will be aroused again, it is likely to also question this, then preconceived, thought.

In thinking we may experience what Tilden calls ‘a larger truth’, but as mortals we cannot grasp the entire and final eternal truth. New insights from thinking rather reveal a new aspect of the intangibles.

When we can get hold of an innovative thought, it can still be difficult to express such a new insight in the words of our languages. Many heritage interpreters find that we can express such deeper meanings only through metaphors and similes. But metaphors, too, can only highlight an aspect of the meaning, even if it is an essential aspect. When we examine the metaphor from another mental perspective it will likely not fit any more – Readers might have noted: ‘highlight’ is



a metaphoric expression itself, such as ‘reflective’, ‘insights’, ‘focus’, ‘fluid concept’ and ‘frozen thought’.

We know the same process of reflective thinking also from the field of sciences. Thomas Kuhn in his book on the structure of scientific revolutions distinguished “normal science” from “extraordinary science”. Normal science applies the established rules and concepts of a discipline and develops new knowledge. Extraordinary science questions the meaning of those fundamental paradigms. Such a venture can lead to a paradigm change which opens new horizons and new ways of perceiving the scientific subject.

Reflective thinking happens in an extraordinary state of mind. This thinking activity is fundamentally different from merely applying and connecting preconceived, frozen concepts through the *normal thinking* of the common sense or in science and technological engineering.

The relevance of reflective thinking

Reflective thinking about intangible meanings is rather far away from our workaday life and common sense. Nevertheless, despite the fact that reflective thinking about intangibles often produces no immediate tangible results, it can play a vital role in how we as human beings live together.

One does not need to be a philosopher or a leading scientist to be confronted with the quest for meaning. Everybody is confronted with it. This extraordinary mode of consciousness can be invoked in extraordinary life situations, such as birth and death, life changing incidents etc. that occur to oneself, close family or close friends. And everybody can deliberately stop his or her everyday business to find room for contemplation and reflection. But of course not all do.

The Eichmann trial revealed to Hannah Arendt that people who do not think, who do not have the quest for meaning, can function perfectly well in normal everyday life. But they are like sleepwalkers. She stresses that such people are often

those who are keen to follow the established rules. Yes, they can be “most respectable pillars of society”. People who avoid reflective thinking tend to stick to the concepts, ideas and values which have been handed down to them. They have acquired them and integrated them in their minds, but this process happens below the level of full consciousness. These people just apply their available concepts and ideas which they have somehow conceived.

This is quite normal; we all are “these people” in our workaday life. It is our normal common sense mode of consciousness “out there”. In normal life we cannot afford to opt out from our daily business to begin reflections; we need preconceived concepts, rules and habits in order to swiftly act and react. But those who never engage in the silent dialogue with their self to examine the meaning of significant concepts, do not develop their own conscience. This can become dangerous for society because such people are not prepared for extraordinary situations.

When somebody appears in a community and establishes new rules, a new ideology and new “values”, then the “sleepwalkers” will also be the first to obey those new rules because they are the least likely to indulge into thinking. Their world view and value system can be reversed rather easily. This idea leads Hannah Arendt to a disturbing interpretation of what happened in Germany:

“The ease with which such a reversal can take place under certain conditions suggests indeed that everybody was fast asleep when it occurred. I am alluding, of course, to what happened in Nazi Germany, and to some extent, also in Stalinist Russia, when suddenly the basic commandments of Western morality were reversed: in one case, ‘Thou shalt not kill’; in the other, ‘Thou shalt not bear false witness against thy neighbor.’ And the sequel—the reversal of the reversal, the fact that it was so surprisingly easy ‘to re-educate’ the Germans after the collapse of the Third Reich, so easy indeed that it was as though re-education was automatic—should not console us either. It was actually the same phenomenon.”



This should be most disturbing in the context of our investigations: From Hannah Arendt's observation follows that uplifting people through interpreting, or re-interpreting, historic facts in the light of 'good values' is not a final solution. We might succeed to re-interpret history in Europe by making it meaningful for the people in the light of "European values". When people, while in the mode of sleepwalking, are being told by interpreters and others how to interpret the world in the light of the new ideas in a new European framework, this would provide new orientation for them. Most would adopt those new concepts and ideas on the fly without examining them. Such sleepwalkers are, again, easy to rule as they tend to follow the new rules and values without much questioning.

That's why re-interpretation could be very powerful as we have already seen above. To be clear: up to date Europe has not nearly achieved such a re-interpretation of history from a European perspective and its fundamental values. There are only timid attempts in this direction such as the European Heritage Label; but these attempts are by far too small to have an impact. They are almost invisible, compared to all the EU's efforts relating to the functioning of markets and industries.

But let us imagine that the EU together with its member states used the latest decades to undertake a really big campaign to foster European values through re-interpretation of heritage and history for the broad population. Let us assume that such a venture is a wild success. Then, that's the lesson to learn from Hannah Arendt's observation, such a success "should not console us either". Such reversed people would still be vulnerable to somebody else who offers a comfortable ideology, an ideology which makes it more easy to feel as part of a "great group" – maybe an "outstanding group" which looks down upon the mainstream. The leaders of such groups promise happiness through certainty, and certainty by providing simplistic answers to great questions.

On the other side are those people who have developed a habit of questioning important concepts, i.e. who are frequently in touch with their conscience. They examine their own preconceived meanings. They examine what others told

them while they mentally digest how they understood the other. They employ this habit of exercising the silent dialogue with oneself, when they feel that a theme is significant.

Such thinking individuals are not so easy to govern. Thinking people can be difficult and unreliable within a given order. They do not always function smoothly and their thoughts are often considered subversive. Socrates was sentenced to death for that reason. But those who are used to reflective thinking are also the ones who are most likely to question totalitarian ideologies and their implications.

Let's return to our two hikers who arrive at the pass. Now the woman realises what the grey thing is, which she had not been able to recognize from a distance: a concrete bunker. Next to it stands a column with many names and dates, and the title says:

In Memoriam

*To our heroes who sacrificed their lives
for our great nation*

This resonates with her, and her inner dialogue is stimulated again: have they really been 'brave' as 'hero' implies? Have some of them been forced? Some were very young. Have they rather been indoctrinated and used? But then by whom? By the great nation? What does 'great nation' actually mean?

And she continues: could it be that the idea of 'great nation' is only a mirage, a will-o'-the-wisp luring people into dangerous swamps? But then, what did people who fought against the oppression of their national identity strive for? There must be something...

She does not find clear-cut answers, but she finds striking questions. These questions wake her up to perceive an area in the world of intangible ideas in a new light. It is rather a spotlight, as thinking threads cannot provide the overview of the mind's totality of concepts, ideas and digested experiences. But a desire has been sparked off to discover more questions and examine them from different perspectives, in order to conceive new aspects of the idea



of a 'great nation'. The quest for meaning is an urge to find out what might be misconceptions of the naive mind; and to move forward towards a clearer and more essential meaning. When she comes across the mention of 'great nation' she will never be able to apply it as naively as before. The flame of reflective thinking might be sparked off again and again as it will shed new light on future experiences. Furthermore, this flame of active thinking, in contrast to merely having thoughts, is likely to spread, i.e. to provoke new questions of meaning.

Instead of finding final answers, she has found a kind of new inner sense which helps her to 'perceive' in the intangible sphere of concepts, ideas and their relationships. It feels to her like having woken up. She feels more alive in this mode of reflective thinking. At the same time, she does not need to borrow her self-esteem from a 'great group'.

From this perspective the highest end for heritage interpretation is to provide food for the reflective thinking process, that is to feed the fire which sheds light on the meanings of intangible concepts and universal ideas. Interpretation can be a means to help people experience pure thinking, the active and conscious dialogue with oneself which inevitably leads to the growth of conscience.

Some conclusions

Let's look back at the hike through different modes of mind and how they relate to heritage interpretation.

At first we must remember that heritage interpretation is an educational activity, and hence interpreters must be aware of the plurality of learners. For the two hikers, though they were friends, the experience of nature and culture was rather different. The man enjoyed to share with his friend what he finds significant about the castle ruin. As always when he came there, he enjoyed the atmosphere of the ruin and the landscape. There was nothing new for him about the castle as he knew the place. But for a moment, he felt the beauty and wonder of the flower

and its astonishing relationship to these moths. This was a rare experience for him, because he does not consider himself a nature boy.

Learning from history through interpretive experience

For the woman, the theme of virtues and bloody feuds struck a chord. This had been only a side remark in the man's interpretation. It was not the message he intended to get across. But it triggered her to reflect while she was walking. In the beginning this thinking was a rather subtle experience, a silent dialogue with herself, wondering about what seemed to her incoherent. However, these reflections, as subtle as they appeared, had an impact. She became more sensitive for the explicit and implicit use of the idea of "bravery".

The really unsettling questions appeared later when she read the headline of the war memorial - unsettling because this notion of 'great nation' obviously is powerful and impacts life and politics in various ways. She will never again be able to treat the idea of 'great nation' as naively as she had done before. Up to that moment she had applied this unexamined concept as it had been passed on to her. She used it to connect common sense experience with something meaningful and uplifting. She then applied this idea like a sleepwalker, similar to many others. She woke up when she started to give account to herself what 'great nation' actually means. She began to examine it in the light of other concepts which she had available in her mind, and in the light of experiences to which this idea was attached in her mind, e.g. her first-hand experience of how an unknown writer used "great nation" at the war memorial.

But what if the hikers would not have descended via the pass and the memorial? Then this quest of meaning could also have appeared to her in another situation later. Provided a matching situation occurs, such a striking question for meaning can be triggered by the conscience even years after an interpretive experience. Therefore it is probably very difficult, or rather



impossible, to measure this kind of learning outcomes . Nevertheless, there are good reasons to consider *the sparking-off of reflective thinking as the highest achievement which heritage interpretation can aim for.*

From this perspective, encouraging reflective thinking about intangible concepts through first-hand experience of heritage also appears as the probably most powerful form of learning from history.

Remember Christopher Clark's puzzled remarks under the impression of Brexit, i.e. present-day victories of populist movements. Once a sensitivity for the quest for meaning with regard to significant key concepts is aroused, a person cannot any more naively apply them, or adopt them from others, without questioning them. Those who have developed a habit of reflective thinking are certainly much less vulnerable to, or rather immune against, populist slogans with their simplifications, half-truths and stupid lies, which often appeal to basic emotions. Typical simplistic we-against-them dualistic constructions dissolve into meaninglessness when one examines their conceptual incoherence and reflects on the rich diversity of real world experiences.

For a plural, democratic society it can be decisive that people develop the ability and habit in reflective thinking. Therefore they need to develop their own treasure of first-hand experiences which are connected to their sensed reality. The latter immunises against lies and conspiracy theories - but only after they have digested these experiences through a thinking process. Heritage interpretation can do both: provoke reflective thinking on significant intangible ideas and provide first-hand experience in combination with reconstructions of aspects of past realities on the basis of reliable second-hand scientific information.

So, do we have a clear-cut answer to the opening question whether heritage interpretation can contribute to learning in a way which reduces the likelihood that citizens follow anti-human leaders? Yes, it certainly can contribute to reduce the likelihood, but of course there is by no means a kind of automatism that works for everybody.

Heritage interpretation for everybody

We must take seriously what Tilden wrote: people are made happy by certainty; uncertainties are a source of spiritual loneliness and disquietude. That's true - at least from the perspective of a person who has not experienced the inner power of the silent dialogue with one's own self. These people long for certainties. But of course certainties do not provoke reflection. Instead, real thinking is encouraged by deep questions, i.e. by uncertainties. Here is the dilemma.

As interpreters we must take into account that reflective thinking cannot be forced and that many people try to avoid it. Doubt is uncomfortable. Questioning the meaning of intangible concepts can challenge the fundamental beliefs one holds. This activity threatens to dissolve a person's identity construction, for example if the person identifies him- or herself through belonging to a 'great group'. Therefore no interpreter can predict who will respond positively to such a challenge, and who will ignore it, turn into a position of self-defence or walk away offended etc.

One of the most interesting aspects in Tilden's book might be his deep respect for the dignity of visitors in their diversity. He was a fine observer with a lot of empathy:

"The visitors who come for his [the interpreter's] service (...) come frequently with mere idle curiosity, or to kill time, or from boredom. It is for us to understand, and affectionately to weigh, not the ignorance, for that is apparent, but the reasons for the ignorance. Compared to the usual fate of humans, we who are engaged in preservational work, daily in contact with what we most like and admire, are fortunate indeed. (...) Do you really think this is common experience in the workaday world? Are you unaware of the fact that most people often feel that they are travelling the wrong road, and bitterly conclude that it is too late to return to the distant fork?"

You cannot change this, but you can understand it; and



thus you can account for the poor conditioning of those whom you would delight with an introduction to the treasures in your custody...

He also stressed that visitors are in very different moods when they arrive at a heritage area. In this context we also must be aware that heritage interpretation as a holistic visitor service, i.e. as a profession, comprises more than interpretation in its narrow sense. We remember, essentially interpretation is about embedding things into meaningful contexts of intangibles and it should aim to arouse the inner activity of reflective thinking. But to get there, heritage interpretation as a visitor service needs to take into account all the different modes of mind which have been discussed along the hike up to the summit.

- First-hand experience

It starts with the provision of access to first-hand experience. Some visitors might just seek relaxation and an aesthetic experience, not wanting to be bothered by any interpretation at all. And this must be respected. The mood can change after a while and thus their receptiveness and desire can change as well. But it would not make sense to confront people with an interpretation about deep meanings, while they want to be left alone.

- Reconstruction of past or distant situations

Others might come to immerse into a past situation. This desire is often connected with a desire for nostalgia. These visitors will expect descriptions which arouse a vivid imagination. They might appreciate reconstructions and re-enactments that allow them to perceive or even to take part, as if they themselves were at another time and another place. At the same time imagination and immersion can arouse empathy to “experience” the world from the position of other people, or other living creatures.

- Explanations

Again others, or the same persons at another moment, are curious to learn how something functions and seek for a simple explanation.

- Interpretation

All this has to be respected and dealt with. Nevertheless, Tilden would surely advocate to lead the interpretive service to the core of heritage interpretation: to interpret the meanings of heritage in a way that responds the need for spiritual uplifting, the desire to find one’s place in nature and among men.

Heritage institutions suspicious of the dangers that are involved in meaning making might be tempted to refuse to serve this need; they could restrict their visitor service to descriptions, reconstructions and explanations of scientific findings. But then others will serve the desire for meaning making. And those others will do it for their own agenda, they will provide orientation by imparting their ideologies.

However, we must be fully aware of the dangers which can result especially from any one-sided interpretation that only reflects one great group’s convictions, e.g. that of the ruling parties which govern the management of a heritage site. The leaders of authoritarian regimes or so called guided or managed democracies use this type of interpretation for their purposes. Therefore, from the perspective of the ideas outlined here, it will be important to develop adequate professional ethics.





Multiple perspectives heritage interpretation for the 21st century

Maybe for a start one could consider that no heritage interpretation should contradict the European values and intangibles which are highlighted in articles 2 and 3 of the Lisbon treaty or in the Charter of Fundamental Rights of the European Union and similar documents. They are based on the same philosophies that inspired the universal human rights which have in common the respect for the dignity of human beings as individuals and the appreciation of diversity and plurality.

Diversity implies diverse physical and social positions of past people in space and time, and a plurality of mental perspectives from which things, places, events and historical characters may be meaningful and significant in various ways. As a consequence, in many cases interpretation from several different perspectives could be an appropriate approach for plural societies.

One perspective would highlight meanings as they are significant for a dominant group, e.g. from a national perspective, which many visitors feel they belong to. This will allow those visitors to attach emotionally. They feel that their world view is taken into account and thus they will become receptive. But such an interpretation should probably always confront the visitors with one or more differing perspectives, such as the views of a minority or another social group for whom the same thing, person or event means something else.

Multiple-perspectives interpretation that applies meaningful concepts can help to combat inhuman ideologies - provided it illuminates a theme through the above mentioned universals. It provides the normal thinking with alternative views. The alternative views are empowered through their connection to first-hand experienced reality as well as empathy for other people or creatures who live at another place in time and space. Many visitors may then adjust their preconceived concepts and ideas 'on the fly' - in the sleepwalker mode:

they will not be fully conscious about these adjustments. However, that's already an achievement.

But we must be clear that we only operate on the same level of normal consciousness, on which the other ideologies work, too. Therefore these people will still be vulnerable to the attraction of simplistic world-views which promise less complicated, effortless certainties in combination with emotions that boost the ego.

However, the art of ethical, *multi-perspectives* interpretation will certainly have another effect: it increases the likelihood that more visitors will be encouraged to reflective thinking. Probably not during the visit, as visitors are busy with their consciousness "out there" immersed in the story. Often there is no room for silent contemplation, especially when one is part of group, for example during a guided interpretive tour. But a multiple-perspective interpretation which is constructed in a way that implies deeper questions may arouse reflective thinking later - maybe even much later. These different perspectives, adjusted concepts and the real-world experience will be stored in visitors' minds. Provocative interpretation from multiple perspectives contains potential food for thought, or better, material for future reflective thinking activity. And we never know when life will lead a person in a situation which sparks off such material for the silent dialogue within the self.

It is not clear whether Tilden was fully aware of the extraordinary mode of reflective thinking and its role for meaning making. However, the above quoted text passage, about the visitors' poor conditioning when they come from their workaday life to a heritage site, continues with an emphatic exclamation. It could point in such a direction:

... There is the challenge! To put your visitor in possession of at least one disturbing idea that may grow into a fruitful interest.

We could fully subscribe to this as a mission statement for heritage interpretation, if we further elaborate what 'fruitful interest' should mean in the context of 21st century Europe:



A *fruitful uncertainty* which may provoke a person to engage in the silent dialogue with the self. A fruitful question seeking for growing clarity of the meaning of intangible concepts in coherence with its relations to both other concepts and ideas as well as to the diverse appearances in the real world. In other words: a disturbing idea that may provoke reflective thinking which will engage and nourish conscience.

Could it be that in a future time the ability and habit of reflective thinking might be considered as a core competence for citizenship in a plural and democratic society?

PS As this book was intended as a manual, some readers might be interested in an exercise. Here it is: take your time to think about how the major ideas outlined in this chapter from 'first-hand experience' to the 'silent dialogue with oneself' relate to the idea of 'sustainability' in the context of heritage interpretation.

PPS This chapter offers a rather unorthodox approach to re-consider the philosophy of heritage interpretation in a European context. Those who want to dig deeper find references and some more considerations in the e-book. Some will wish to read further technical literature from within the field of interpretation or from different strands in philosophy. They will probably find differences in terminology, i.e. the use of words to denote philosophical concepts. The contexts often help to understand what is meant despite such terminological differences. Those who indulge in this venture of exploring the philosophical foundations of heritage interpretation will certainly find many more interesting aspects, deeper insights and fruitful questions.

CHAPTER 4

EDUCATIONAL GOALS OF INTERPRETATION

Jaap van Lakerveld & Guy Tilkin





Needs, goals and expectations of adult learners/visitors

The Inherit project focuses on educating Heritage professionals. As such it emphasizes the learning processes of people working in the heritage sector, either as professionals or as volunteers. They, in turn, do their work to promote learning among their visitors, whose learning processes are, however, different to some extent. Visitors do not come to a site for purposes of learning, or if they do, they do not come for that purpose only. They come for many reasons.

John Falk distinguishes 5 kinds of visitors. He mentions:

- Explorers who are curiosity driven with generic interest in the site, looking for something that may grab their attention;
- Facilitators, who are socially motivated. They visit a site to enable others (relatives, acquaintances, friends, to experience the site;
- Hobbyists, who identify with the theme of the site and have a passionate hunger for content;
- Experience seekers, visitors who consider the site as a place you need to have visited, to have been there and to have done that.
- Rechargers, visitors who primarily seek to have a contemplative, spiritual and /or restore experience.

Visitors, apart from having different needs, also differ in many other ways. They differ in age, gender, origin, educational background, in experiences with previously visited sites or with the current one. They each bring their personal or shared visitors' history : memories of what they have experienced, what they have seen, what it did to them. These memories may include fundamental experiences but also remembrances of specific exhibits, people, settings, gift shops etc.

Visitors have different styles. This is partly reflected by their needs and expectations, but also partly integrated in how they wish to be approached, how they wish to process the information, the experience and the interpretation, and in which order. Howard Gardner distinguishes 7 learner styles: the visual learner, the text processor, the logical mathematical learner, the musical learner, the kinetic learner, the social learner and the solitary introspective learner. These different styles each require a different approach. People in reality have mixed styles, but still these compositions of styles require an adaptable approach towards visitors.

Diversity within visitors groups

Besides the individual visitors, we see people visiting places in pairs or in groups, such as friends visiting a site, a group of colleagues from an organisation or people sharing a particular field of interest. Apart from distinctions in terms of the specific features, expectations and needs of visitors, we also see that visitors come in groups of various compositions. Studies have been carried out to make inventories of the kinds of people visiting sites, showing that a substantial proportion of them consists of family groups. An increasing number of grandparents bring their grandchildren to sites, and interestingly enough the research reveals that they have distinct visiting styles.





Research reveals that grandmothers visiting sites with grandchildren tend to act as facilitators: they bring drinks and food, they see to it that everybody is comfortable and if necessary they intervene. Grandfathers tend to be more into the experience together with their grandchildren (boys will be boys?) and have their inputs from their own experience.

Grandparents play an important role in the cultural enrichment of children. As compared to the stereotype image, the currently showing up grandparents are between 55 and 65, in good health, energetic and more physically mobile and technically literate than previous generations were. There is evidence that grandfathers with grandchildren appear to be a group in its own right.

All this implies that there is no such thing as “the visitors”, or “the audience”. To provide visitors with the experience, the theme, the content and the interpretation they need, the offer provided to audiences needs to be diverse. It will have to be adaptable and responsive to the needs and expectations of people and provide the required offer.

The needs and goals of society and of site managers

A distinction should be made between the needs of the visitors or audiences and the needs of society and heritage site staff. In the latter categories, we may include experts, stakeholders, decision makers, museum staff and people at work in all kinds of heritage contexts (natural parks, theatres, castles, monuments, historical city centres etc.). A next target group for heritage interpretation are teachers, teacher educators and trainers of heritage interpreters, and maybe even a wider circle of (adult) educators. The needs of all of these parties concerned may be of various kinds.

Awareness and appreciation

Not only the visitors have needs. Society and site managers have needs as well. One category of needs is focused on the heritage as such, its quality, its beauty or its meaning, and on raising the awareness of its value among audiences of visitors, or people affected (in cases of intangible heritage). By helping people to open their eyes for the aspects of interest of heritage, either natural or cultural, groups of people may become aware of the necessity to preserve it and share these perceptions with others. When people value heritage they will support its preservation, although at the same time they may be a threat to it.

In the centre of cities such as Amsterdam, Barcelona and Venice, so many tourists spend their holidays, or arrive for a day trip that authorities as well as citizens begin to worry about the effects of these crowds upon their daily lives as well as about the heritage itself. Tourists abuse monuments as toilets, leave garbage everywhere and can be noisy and intrusive. This all requires policies to find a balance between conservation and exposure of heritage.



There may be risks of damage when too many visitors come to heritage sites. Before long they might be turned into entertainment sites. Heritage interpreters will have to operate in this context and find and sustain the delicate balance necessary to meet the needs of all parties concerned.



Citizenship

The needs of society and site managers may not only concern the heritage as such. Some of them are needs which may be met through heritage. Here heritage is a means to an end, rather than the end itself. Examples of such contributions to citizenship may be:

A Sense of identity

In heritage environments or confronted with related objects, expressions or art, people can realise that they belong to a local, regional, national, continental identity and that these roots offer them a perspective from which to explore and expand their world. Prone as this may seem to exclusive feelings of identity, it may as well help you look at your own identity with more distance, for instance when you realise that in former times you were part of another empire, state or structure than you currently are. Interpretation may play an important part in moderating such processes.

Social and cultural cohesion

Through this sense of identity, people get the experience and the language to express their values and their characteristics, which allows them to share and compare views and values. Implicit assumptions about the views of others may be revealed and mutual understanding may benefit from it. Heritage is no guarantee for social cohesion but it may be helpful. Interpreters at work in the heritage sector see it as one of their challenges to facilitate this search for meaning and for ways to share ideas on it with others.



The coffee mill

In an area in the Hague people organised meetings in one of the old windmills - a reminder of old times when these were still the outskirts of the town. A lot of nationalities have come to live together in the area concerned. Social workers and inhabitants of the neighbourhood have decided to restore the old mill and turn it into a coffee house. The common experience of restoring the mill, discussing the role mills play in various countries and, in doing so, getting to know more about each other, each other's cultures, crafts and styles, adds to mutual understanding and social and cultural coherence.

Wellbeing

Heritage visitors may visit heritage sites for pleasure, for the activity or for the good company aspects of it. In that way people may feel better about themselves, their friends and relatives, their work or their lives. Heritage in many cases has such effects. It offers a change of perspective, a healthy natural environment or an experience of another kind. It enriches the mind and offers experiences rather than just information or facts. Like reading books, it offers additional experiences to people that allow them to understand their position in either cultural or natural history.



Many long distance walking trails such as the grand randonnées or the walking trails in city centres, combine good company, heritage and activity. Many people choose to make such walks to maintain their friendships. These walks contribute to the relation by adding new shared experiences and plenty of possible conversation topics. Of course the health aspect of it is also the physical element that helps people to get or remain in good shape.



Lifelong learning

Heritage can also be considered a vehicle for lifelong learning. In the InHerit project this link is explicitly made. By considering heritage interpreters a category of (adult) educators and by relating their activities to the professional profile of educators and learners, the project aims at seeking ways to include heritage in learning environments or to make use of heritage as a learning environment for lifelong learning. Although learning is not the only purpose of heritage visitors, still many visitors learn a lot. This fact again adds to the other aspects mentioned such as citizenship, wellbeing, and last but not least to their competences for lifelong learning. In many instances this learning is not just an individual learning process, it may also involve social learning in groups, or intergenerational learning in families or groups of relatives such as grandparents and grandchildren. Apart from the people visiting sites or seeking heritage experiences, still another group engages in lifelong learning. These are the many volunteers at work in heritage contexts. Their learning experiences and those of the visitors may well be made mutually enriching and rewarding. The same applies to the professionals involved, of course.

Meeting the needs and goals of all concerned

The diverse needs and expectations of visitors

The kind of learning the visitors engage in is often referred to in literature as informal learning, free choice learning and incidental learning. Even though these concepts have slightly different meanings, we can derive a few elements from them that apply to visitors. Visitors usually do not come for learning purposes. They come to have fun, they seek cultural entertainment, they wish to identify with characters or eras, they seek a 'thrill' or an experience and, by doing so, learning may occur as a side effect or a spin off. Learning by the way is certainly not the only outcome. Wellbeing, fulfilment, identity and social connection can also be enhanced.

More than learning

Site managers, copywriters and guides try to motivate the visitors socially, intellectually, emotionally and spiritually, to establish the experiences that generate the outcomes mentioned. They do so by providing a mix of methods and means. They create aesthetic, didactic, often hands on objects and environments, sometimes using multimedia, minds on environments, and immersive environments (in which visitors become part of the exhibition). In doing so, they try to provide the rich experience that meets the needs and expectations of various (sub)audiences.

Like so many other sectors, the heritage sector has also increasingly become aware that people, participants, guests or visitors should be seen as a diverse audience that needs to be served in a person- or group oriented way in order to enable them individually and collectively to benefit most from their visits. Heritage interpreters, whether hosts, guides or copywriters, try to work on this by:



Managing expectations

They inform visitors on what they may expect, while at the same time listening to the expectations the visitors have in order to mutually attune these expectations optimally.



In a museum in Barcelona visitors were asked a few questions about their expectations about the museum visit. A picture was taken before their visit, and another one upon return to the exit, to see what the exhibition had done to them. This led to a lot of fun and people started discussing what they had experienced. This is an

example of a simple tool to manage the expectations and at the same time relate to the visitors.

Relating to the visitors

Visitors need to feel welcome, to be seen and heard. In this way they will feel at ease and ready to allow themselves the experience. Part of this is the acknowledgement of the visitors' background and experience. The more people feel respected and acknowledged, the more they will feel ready to take part in the what is organised for them. Sometimes questions are a good means to connect to an audience.

Telling stories

Stories are vehicles for experience and learning. They work much better than just facts and figures, they allow visitors to identify with situations and people, they may be drawn into the story and empathise and sympathise with it. This contextualises their experiences and therefore promotes their free choice, or incidental learning. Stories are powerful means to help people process and retain the experiences they go through. They can identify with the characters in stories. They may wonder how they would have acted under the sketched circumstances. Stories are more easily shared than information. Stories catch the attention, trigger imagination and creative thinking and they promote dialogue. That is why

storytelling is such a good tool to involve people in heritage interpretation. They will not look at things from the outside only, but they will experience the story and the site from within.

Asking open questions

To promote participation and concentration it is helpful to ask open question that will evoke narrative answers rather than closed answers, or again just facts or figures. Open questions often start with how or why, rather than with what or when. The evoked narrative responses show the same advantages as the stories mentioned above. When people speak up, when they express their impressions, their views and their values, they evoke again reactions of others. Thus the individual creation of meaning will be enriched by the dialogues visitors may have with others. New views, surprising perspectives, articulation of ideas and dilemmas may emanate from it and add to the quality of the experience.

Interacting

People may gain from interaction during visits. This may enrich the experience, not only when they come as a group but also when they are on their own. In order to evoke some interaction it is helpful to relate the experience to value issues, to certain dilemmas, maybe topics that are currently in the news. The challenge is to find issues people feel they can contribute to. It is important not to start dialogues on any issue or item, but to seek the theme that may serve as a red thread during the visit. A group of doctors visiting a historical hospital may be interested in talking about the architecture of the place and the implicit views on health care. Teachers might reflect on how it would be to be hospitalised there as a child and how we currently treat children when in hospital. *An international group of people visited the Ursuline Winter Garden in Mechelen, Belgium*

The impressive school and convent complex of the Ursuline nuns once was an internationally acclaimed 'pensionnat de demoiselles' – a boarding school for the education of young ladies. This prestige is reflected in the architecture which



ranges from neoclassicism to art nouveau. This is all visible in parts of the convent building such as the Ursula Room, the Alps Room, the Empire Hallway, the Reception Refectory, the magnificent convent church, the Piano Gallery, the Oratory and the museum.



The art-nouveau winter garden was built in 1900 to provide a reception area worthy of notable visitors to the school.

Before having a guided tour, the visitors were asked to sit together and talk about the schools they had attended, or schools they knew in their own countries. Only then the tour started. Some saw the beauty of the site as compared to the schools they had gone to; others felt it was an environment for grown-ups, showing few signs of being a children's world. Others again felt the building was built to impress and stressed the exclusive elitist nature of the school. This variety of views enriched the experience significantly.

Including all the senses

Because of the variety of styles among visitors it is important to include many senses in the experience provided. Visuals, music, sounds, texts, tactile sensations, smells or movements may be included. It is the whole that makes the experience. The richer the experience, the more it will be valued and the longer it will be retained (remembered).



A tour through the Schindler Museum in Krakow, the former Schindler factory building, gives visitors an impression of how Jews in Krakow lived their lives before and during the Second World War. It does so by leading the visitors through various rooms. These rooms represent many aspects of how the war affected the people. Visitors go through living rooms, they can watch old street views, they walk through basements where people lived in hiding. The materials and the smells, as well as the sounds and various tactile elements contribute to making this tour an unforgettable and impressive one.

Offering variety

To make the experience worthwhile it is recommended to include variety. That is what keeps the mind alert and such state of mind is what is needed to make the experience pay off in terms of outcomes such as learning, wellbeing, joy and fulfilment.

More specifically the heritage sector is moving into a direction in which the offers serve various needs in various ways. The Inherit project contributes to the development of professional competences to enable heritage interpreters to further professionalise their offers, ranging from excursions to guided tours, from entertainment to re-enactment, play-acting, sports, food, crafts, experiences, tools, instruments, infrastructure, media and arts.



Dealing with diversity

Both the visitors and the persons responsible show a diverse set of needs and goals, and this implies that heritage interpreters will have to find ways to organise their offer in such a way that participants may each find something that appeals to them. This may be realised in various ways:

- **Tracking**

Suggesting different routes for different audiences. In this approach people are allowed to follow a track they prefer. In a museum, for instance, you could consider to have different routes such as the children track, the art track, the history track etc.

- **Grouping**

This approach means that people are grouped according to their goals and needs. When organized this way, each group is homogeneous and may be addressed as such.

- **Open approach**

This means that individual visitors have a free choice how, in which order and with which focus they move around.

- **Social interactive approach (mixed groups)**

In this approach the diversity is made an advantage, so instead of solving the problem of diversity, it is made an asset. It enriches the experience through the dialogues it evokes.

Of course the sketched models can also be mixed. The choice of the approach depends to a high extent on the social context of the visit and on the composition of the visitors group in terms of their connections. If they come as a group, for the good company aspect of it, it would be wrong to split up the group. So it is necessary to know something about the visitors (in general, but also about specific groups) to decide upon one of the approaches mentioned.



In an exhibition about the work of Mark Rothko, the organisers of the exhibition decided to offer the visitors two

options. Either one could get information about the life and work of Rothko and then see the paintings, or the reverse, first the experience and only then the information. A nice example of a tracking approach to differentiation.



Improving the learning: Narratives for interpretation

The famous psychologist J. Bruner postulates that we use two ways of thinking: “a paradigmatic and a narrative one”.⁴³ The first one is ‘logic’ and looks for causal relations (deduction, induction, abduction). It deals with facts and objective truth. The narrative way of thinking deals with human intentions, feelings and personal experiences.

Both ways of thinking play a role in interpretation. Facts, figures and objective truth are indeed important but most important in interpretation is to relate them to the meaning making frame of the visitor. Here the stories come in. The major argument for introducing storytelling in guided tours and mediated interpretation is the fact that stories are offered through a ‘narrative pattern’. Any story is a narrative and its structure reflects the way we, as learning individuals, attribute meaning to (or make sense out of) personal experiences. Story-shaped information is more easily absorbed by our brains, so to speak. Offering content through narratives is considered to be beneficial to the learning process in many ways. It acts as a ‘sense making tool’, supports our imagination and capacity to memorise and it contributes to identity development .

Storytelling as a meaning making tool

“Narrative is a fundamental structure of human meaning making” says J. Bruner ⁴⁴. Also M. Clark and M. Rossiter are convinced that “Meaning making is a narrative process. We make sense of our everyday experiences by storying them, by constructing narratives that make things cohere. It is a matter of locating experiences within a particular narrative or by constructing a new narrative”.⁴⁵

We try to mentally connect any new piece of information to an existing related chain of thoughts. This relationship can be manifold through concepts, feelings, images, sensations, metaphors... The new elements are ‘wrapped’ as a narrative and connected to existing narratives. The type of relationship between new and old narratives and the place the new narrative gets in the (cultural) clusters of old ones defines its meaning(s). “Therefore, the most effective way to reach learners with educational messages is in and through these narrative constructions. Learners connect new knowledge with lived experience and weave it into existing narratives of meaning.”⁴⁶

Storytelling as a memory tool

Not only the meaning making process is enhanced by using stories in learning activities; it is also beneficial for our memories. This process is enhanced by two factors: the imaginative element and the emotional element of storytelling. When listening to a story, people create images in their minds. The narrator introduces images and ‘conducts/orchestrates’ the imagination of the people in the audience. “When adults listen to a narrative they build in their mind’s eye, so to speak, a mental image or a model of the situation that is being described or of the events that unfold. It is that mental model that they retain over a long period of time rather than the particular words.” ⁴⁷

But the emotional aspect is equally important. Stories appeal to the heart, they engage the listener in an emotional way, raise feelings, urge to act. “Stories are powerful precisely because they engage learners at a deeply human level. Stories draw us into an experience at more than a cognitive level; they engage our spirit, our imagination, our heart, and this engagement is complex and holistic”.⁴⁸

43 J. Bruner, 1986

44 Ibid.

45 Clark, M. & Rossiter, M., 2008

46 Rossiter, M., 2002

47 Harris, P., 2000

48 Clark and Rossiter, 2008



Introducing stories and storytelling in interpretation

So stories play a very important role in interpretation. In reality we probably should be talking about introducing a narrative approach to interpretation. Inserting a simple story is one of the possible ways to achieve this. Another approach though is 'storying content': offering content in a 'story way'.

The interpreter looks at the content and material of the site or collection and tries to find out what parts can be offered as (or in) a small story. This means adding elements like place, time, actions, characters, emotions and intentions of people involved, sensory details, plots, metaphors, ... in order to create images and atmosphere. One can compare it with teaching about physics and using stories like Archimedes in his bath crying out "Eureka" or explaining gravity through Newton witnessing the apple dropping to the ground in his mother's garden.

Storytelling as identity: we are our stories

« Un homme, c'est toujours un conteur d'histoires, il vit entouré de ses histoires et des histoires d'autrui, il voit tout ce qui lui arrive à travers elles; et il cherche à vivre sa vie comme s'il la racontait ».

J.P. Sartre

Making meaning and making sense out of what we experience every day is not only an individual learning process but it is also a social constructivist learning process. As such it is also grounded in a cultural and social context. We build our narratives together with our peers, our building blocks are offered by our social environment, we cluster our narratives according to the models offered.

Clark and Rossiter support the idea that we can understand identity as a narrative construction. "The construction of an acceptable life narrative is the central process of adult

development."⁴⁹ So, our identity is the sum of our stories. But it is a dynamic concept; we add stories and we drop stories as we go on with our lives.

In this view, interpretation does not only contribute to meaning making but also to identity building of the visitors.

Interpretation as mediator

Heritage interpreters mediate between the richness of the context of the heritage available and the learning needs of the visitors/learners. At the same time they do this within the wider societal context. Interpretation also seeks to mediate between the societal goals and priorities and the individual needs and goals. By doing so, it stretches the perspective of all people concerned and opens wider horizons that otherwise would not have been perceived. Thus it contributes to the individual needs in terms of learning, good company, enjoyment, activity, achievement or fulfilment as well as to the awareness of the value of heritage, appreciation of its meaning, and the necessity to contribute to its preservation. In this way it also opens eyes for the potential of heritage in bringing people together, in giving a sense of direction and in society and in lifelong learning processes of people.

Heritage interpretation leaves the interpretation in the hands and minds of the visitors, but it provides an environment, stories, objects and explanations to allow visitors to have an experience that helps them understand, value and enjoy a site, an object or a phenomenon. By doing so it brings people closer to their historical and natural roots, closer to each other and it adds to processes of wellbeing and of lifelong learning. When the appreciation of heritage will grow, the awareness of the necessity to preserve it for next generations may grow accordingly. In that way heritage will keep on providing next generations with inspiring contexts for learning and enjoyment.

49 Ibid.



Literature:

- Ela Beaumont and Pat Sterry,
A study of grandparents and grandchildren as visitors to museums and art galleries in the UK
- Bruner, J. Actual minds, possible worlds. Cambridge, MA: Harvard University Press, 1986
- Clarke, M.C. & Rossiter, M. "Narrative learning in adulthood." New Directions for Adult and Continuing Education, 2008.
- John Falk, understanding museum visitors
http://slks.dk/fileadmin/user_upload/dokumenter/KS/institutioner/museer/Indsatsomraader/Brugerundersoegelse/Artikler/John_Falk_Understanding_museum_visitors__motivations_and_learning.pdf
- Harris, P. The Work of the Imagination. Malden, MA: Blackwell Publishers, 2000
- Lynda Kelly
Visitors and Learners: Adult Museum Visitors' Learning Identities
- Jan Packer
Beyond learning: exploring visitors perceptions of the value and benefits of museum experiences
- Rossiter, M. Narrative and stories in adult teaching and learning. ERIC Clearinghouse on Adult Career and Vocational Education, Columbus, OH, 2002.
- Shamsidar Ahmad c.s,
Adapating Museum visitors as participants benefits their learning experiences, Berlin 2014
- Shamsidar Ahmad c.s.
Museum Exhibition Design: Communication of meaning and the shaping of knowledge



CHAPTER 5

COMPETENCES FOR THE PROFESSIONAL FIELD OF HERITAGE INTERPRETATION

Patrick Lehnes





Introduction

The InHerit competence matrix in this chapter maps competences that are relevant for the professional field of heritage interpretation to the European Qualification Framework (EQF). It provides guidance for those who develop or offer training and education. Different certificates or qualifications in heritage interpretation that refer to this matrix will become more easily comparable and transparent in terms of competences and EQF levels. The competence matrix can also be useful to assess an existing programme regarding possible gaps.

For the purpose of this paper we define a 'competence' as: *a person's ability to perform a particular task or activity in a specified range of real world contexts.*

According to this definition⁵⁰, 'competence' is a holistic concept that comprises anything within a person which is needed to perform under real world conditions, i.e. to effectively achieve a task at an appropriate level of quality. Most importantly it does not simply refer to 'a particular context', but to 'a range of real world contexts'.

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

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

This document specifies the competences for the entire professional field of heritage interpretation. Quality can only be indicated in relative terms such as 'adequacy' or 'appropriateness'. In practice, it often depends on the particular situation which quality level is appropriate or not.

In order to become competent an individual needs to acquire a particular combination of knowledge, skills and attitudes (KSAs) which is required to perform in the specified range of contexts. The specifications of a competence determine which KSA are relevant and required.

This has consequences for the logic of this document:

- First the range of real world contexts for the entire field of heritage interpretation is briefly outlined.
- Then the competences that play a role in this professional field are described within the framework of EQF levels.
- KSAs are not covered by this framework. They need to be determined according to the more specific competences that are related to a more limited range of contexts as addressed in a qualification or a training programme

Proposed areas of competences

We have tried to distinguish areas of competences which are relevant for the professional field of heritage interpretation as a whole, covering all positions related to heritage interpretation. Areas of core competences can be distinguished from additional generic competences which, however, are also crucial for the ability to develop and deliver heritage interpretation.⁵¹

Core competence areas in the field of heritage interpretation:

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

⁵⁰ The term 'competence' is used with different meanings in different technical contexts and/or everyday language. One needs to be aware which concept is used in which discourse context. In this document 'competence' is used as a technical term as defined above.

⁵¹ 'Core competence area' refers to those competences that involve knowledge, skills and attitudes that are rather specifically tailored towards the field of heritage interpretation. 'Additional generic competences' are of lesser specificity, e.g. devising a visitor survey for evaluation purposes is not much different from devising surveys in other professional fields. However, there is no strict line to distinguish 'core' from 'generic' competences.



Additional generic competence areas in the field of heritage interpretation:

- Evaluation
- Promotion & advocacy
- Management
- Training

Linking competences with the European Qualifications Framework (EQF)

The EQF outlines an overarching framework to facilitate comparison of qualifications and qualifications levels in order to promote geographical and labour market mobility as well as lifelong learning⁵². The core of the EQF consists of eight common European reference levels, from most basic helper qualifications on level 1 to those referring to higher education (levels 6 to 8). The EQF levels are not described in terms of certificates and degrees but are defined by a set of descriptors indicating the **learning outcomes** relevant to qualifications at that level in any system of qualifications: 'knowledge', 'skills' and 'responsibility and autonomy' (see <http://ec.europa.eu/ploteus/content/descriptors-page>).⁵³

The professional field of heritage interpretation is not yet widely formalised in terms of formal qualifications that are part of different National Qualification Systems. InHerit aims to structure an up and coming professional field before officially acknowledged qualifications have been defined in different

52 European Commission (2008): Explaining the European Qualifications Framework for Lifelong Learning

53 In the EQF the 'responsibility and autonomy' dimension is called 'competence' which should not be confused with the 'competence' definition used in this document and other educational literature. The 'responsibility and autonomy' dimension is only one aspect that makes up a competence in the here used more holistic meaning (as a person's ability to perform in a range of real world contexts).

In this respect the EQF terminology also deviates from the more common typology of learning outcomes which differentiates 'knowledge', 'skills' and 'attitudes' (KSA). The 'attitudes' dimension also includes values etc. This dimension is very important for the professional field and practice of heritage interpretation which is why we use it here. In the context of EQF, professional development of adult education staff, VET and higher education etc., readers should be aware of this terminological ambiguity of some key terms; usually it is clear from the contexts or an explicit definition what is meant.

countries. For this purpose we describe competences at various proficiency levels, rather than qualifications, and link them with the EQF levels.

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.



Bruges

In each area the competences are described according to context and qualification level. These levels go along with the descriptors in the European Qualifications Framework (EQF). 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 which country the competence has been gained in and what 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 EQF. It can also be useful to assess an existing programme regarding possible gaps.



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								

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 personally develop and deliver interpretation of rather low complexity related to one main subject at one place. 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 or one major subject matter would need a different combination.

This way the matrix has a universal value and offers a common ground for comparable job description and curriculum development, which was the aim of the InHerit project.

The professional field of heritage interpretation

In order to specify competences and learning outcomes it is important to be clear about the real world contexts in which the competences are (supposed to be) performed. As we refer here to the entire professional field of heritage interpretation this chapter aims to give a brief overview of

- the wide range of contexts where heritage interpretation actually takes place in Europe,
- the variety of interpretive products,
- the different degrees of complexity.

Range of contexts

- Range of environments

Heritage interpretation takes place in wilderness, in rural cultural landscapes including forests and agricultural land, inside or outside historic buildings or ruins, at archaeological excavation sites, at memorials and battle-fields, in villages, in city centres, at industrial sites, parks and estates, zoos, aquaria and botanical gardens, in visitor centres and all kinds of museums, including eco-museums and open-air



museums. It can take place on the highest mountains or under water in the sea.

Interpretation can take place at gated sites where access can be controlled such as in museum buildings, zoos etc. or it can use public space. A heritage site can be vulnerable or dangerous and may require strict visitor management. Other sites can host millions of annual visitors without any harm to their assets.

- Range of audiences

Audiences addressed by heritage interpretation are non-captive, i.e. they are not there for professional reasons but during their leisure time. However, in terms of previous knowledge and motivation, visitors can be very diverse, ranging from highly motivated persons who are already 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 knowledge backgrounds and sites can deliberately reach out to specific target groups, e.g. minority groups or socially disadvantaged people.

Visitors have different learning styles, a range of physical and mental abilities and different sensory access or communication requirements. And there are visitors of all age groups, from small children to elderly people.

- Range of organisations and organisational structures

Heritage interpretation as a systematic approach and discipline plays an important role in many national parks and protected areas. Other governmental organisations such as forestry or nature and monument conservation authorities also provide interpretation. Those large governmental organisations sometimes have special units that deal with education and interpretation, but many others don't have such interpretation specialists. Many heritage sites, natural and cultural, as well as collections and museums belong to municipalities, ranging from big cities to small villages. Decisions about projects may be made by local councils

and often they depend on external project funding.

In most countries NGOs and charities play an important role in the heritage and heritage interpretation sector. The size of such non-profit organisations can vary considerably, as well as the organisational structure: from a small association run entirely by enthusiastic volunteers to a complex organisation with hundreds or thousands of staff, such as the British Museum or the National Trust for England and Wales. Finally there are privately owned heritage sites and museums, again of various sizes.

Consultancy and design companies are active in this field as well, freelancers or medium-sized companies that offer the whole spectrum from architecture and interior design to exhibition design and interpretation or to landscape architecture. Tour operators specialised in heritage tourism form another group of private businesses that use heritage and its interpretation.

- Range of missions and goals

As diverse as the heritage site and museum operators are, so are the missions and priorities these organisations follow. Generally interpretation is expected to contribute to achieving the operating organisation's mission. But also the mission of supporting organisations, especially if they provide project co-funding, must be taken into account.

Almost all heritage sites and museums aim to encourage people to appreciate the place and to contribute to its conservation, often against the background of taking **stewardship** for **sustainable development**. Other educational goals can play an important role, e.g. at memorials '**learning from history**' or for regional/national museums '**fostering regional or national identity**', '**reinforcing civic values**', '**mutual understanding**' etc.

For municipalities and regions '**fostering the local economy**', mainly through local income generated by tourism, can be an important motivation to invest in heritage interpretation, especially where other job opportunities are rare.



Many heritage organisations also pursue through interpretation and education the goal of **promoting the organisation's own image** and an understanding 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**:

"The Union is founded on the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. These values are common to the Member States in a society in which pluralism, non-discrimination, tolerance, justice, solidarity and equality between women and men prevail." (Article 2, Treaty of the European Union, consolidated version).

The same is true for all values and goals stated in article 3 of the EU's treaty, such as 'peace', 'freedom, security and justice', 'sustainable development', 'social justice', 'equality between women and men, solidarity between generations and protection of the rights of the child', 'respect for the rich cultural and linguistic diversity' and 'a high level of protection and improvement of the quality of the environment'.

Interpretation can provoke learners to reflect on their own identities, beliefs and ethics. The ability and habit of reflective thinking, the silent dialogue with one's self, is a key competence for citizens in plural and democratic societies.

Last but not least, through facilitating learning beyond the familiar, heritage interpretation can contribute to innovative thinking. 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'.

Range of interpretive products

An 'interpretive product' is a whole entity of interpretation, a prepared interpretive programme or device, that a visitor can choose to enjoy. This ranges from an individual wayside panel to a several week heritage tour with an interpretive guide.⁵⁴ Many interpretive products are designed for visits between half an hour to four hours, e.g. self-guided trails or exhibitions in museums and visitor centres as well as most guided walks. Larger sites such as visitor centres and bigger museums offer various interpretive products that can be tailored for different target audiences.



Kurfürsterdamm

Interpretation is delivered in person or through media. In-person interpretation can be traditional guiding, first person costumed guiding by a single guide or a group that plays different characters, performances and re-enactments. Exhibitions and self-guided trails often employ a combination of different media and installations, including booklets, panels and interactive mechanical installations, showcases and dioramas, touch-screens, audio devices or projections, smart

⁵⁴ 'Interpretive product' in this sense also includes services such as personal interpretation which people can choose to participate in (see also Ham, S. (2013), page 4). At a visitor centre a family might choose between enjoying the permanent exhibition on the first floor using panels and labels, using an audio guide or joining a special thematic guided visit of the same exhibition that takes yet another interpretive angle. The three options are different interpretative products. Other interpretive products at this centre might be a temporary exhibition on the second floor, the self-guided experience trail through the park or the guided visit at 10:00 through the nearby nature reserve.



phones and tablets. For exhibitions the entire room or even a building can be designed in a way that it creates an ambience which supports the interpretive theme and narrative.



Canal du Midi - France

Typical working contexts in the field of heritage interpretation at different EQF levels

In general, from the lower to the higher EQF levels in the professional field of heritage interpretation, there is a gradual increase in the following range of factors:

Complexity and diversity of working contexts:

- from delivering a single POI (point of interest) to delivering a single tour, to a set of complimentary tours at a single protected area or museum, to developing and delivering interpretation products for different heritage sites in one region or country, to international work;
- from a single theme to various themes within a narrow disciplinary perspective, to interpretation regardless of any disciplinary boundaries;
- from developing a single interpretive product for one main target group using a simple form of interpretation to a multiple target audiences interpretive product with layers of content and a more complex media mix, to master

planning of a combination of interpretive products for a smaller or a complex site, to strategic master planning for a bigger protected area or tourism destination, or a country wide organisation.

- from dealing with one person in charge who briefs and supervises work to developing the interpretation with the experts in the subject matter integrating the goals and objectives set by the management and project funders, to open participatory planning that involves the site management, experts with diverse disciplinary backgrounds, civil society organisations and interested citizens.

Autonomy and responsibility:

- from delivering interpretation under supervision, which has been developed by others (e.g. as a volunteer guide for the visitors' well-being);
- to developing interpretation under supervision and delivering it autonomously;
- to supervising (and taking responsibility for) volunteers, seasonal staff or media developers;
- to taking responsibility for the entire interpretation unit and its contribution to the mission and goals of a big organisation.

Creativity and originality:

- from the interpretive writer who is merely 'translating' the descriptions and ideas of others to a more concise narrative and more accessible language - which already requires significant creativity;
- to higher levels of originality developing new, original ideas, linking the available material to the audiences' horizons of experience and interest – interpretation as an art;
- to the creation of new and unusual perspectives to interpret the materials.

The following table links some typical roles and working contexts to the EQF levels.



EQF level	Examples of typical roles and working contexts
3	<p>Non-interpretive staff at heritage sites (e.g. museum security staff, reception desk, maintenance staff and office staff but also conservators and researchers) or people living in the vicinity who frequently encounter (potential) visitors. Their role is to provide some advice and guidance in a visitor-oriented manner regarding opportunities to enjoy the heritage and interpretive offers (cf. NAI's Certified Interpretive Host).</p>
4	<p>Volunteers and seasonal staff who are familiar with the site related content and have basic competences in heritage interpretation. They are prepared to deliver one or a few personal interpretation programmes at one place. Every interpretive guide, including junior volunteers, who carries the responsibility for the safety and well-being of a group of adults or children. They are not fully competent to autonomously develop a personal interpretation programme, and need mentoring and supervision by an experienced interpreter. Typically level 4 competences would be achieved through some basic training or informal learning.</p>
5	<p>Interpretation staff (and some advanced volunteers) who are competent to develop and deliver interpretation of rather low complexity related to one main subject at one place. Or freelance interpretive guides who are specialised in one thematic and spatial area. 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. After some experience they can train, mentor and supervise volunteers and junior staff at their home site. Typically level 5 competences would be achieved through more sophisticated vocational training and/or informal learning through experience.</p>
6	<p>Interpretation specialists who are competent to develop and deliver interpretive products (and programmes) for various sites that are related to one major theme subject. They can also deal with specialised academic findings related to their own disciplinary focus. They can work as leading interpretation staff at heritage sites / museums or protected areas of medium complexity, or they work as freelance interpretation consultants for projects with low to medium complexity. Typically level 6 competences would be achieved through higher education programmes or continuous professional development (CPD) courses in heritage interpretation on Bachelor degree level and/or through informal learning through self-taught studies and professional experience.</p>
7	<p>Interpretation specialists who are competent to develop and deliver interpretive products (and programmes) for various sites with a wide range of themes and subjects. They can also integrate academic findings related to various disciplines and various perspectives from civil society stakeholders and local community related to heritage and local /regional development. They can work as leading interpretation staff at complex heritage sites / museums or protected areas that require multi-disciplinary thinking and facilitation, or they work as interpretation consultants for various projects including those of high complexity. After some experience they can further develop into increasingly complex interpretive master planning, or into advanced training and higher education, or into research of heritage interpretation. Typically level 7 competences would be achieved through higher education programmes or continuous professional development (CPD) courses in heritage interpretation on Master degree level and/or through informal learning through self-taught studies and professional experience.</p>



8

They work at the most advanced frontiers of the professional field, further developing and innovating the philosophy, theory, principles, methodologies and techniques of heritage interpretation.

They shape and represent the profession nationally and internationally and collaborate interdisciplinarily as well as with policy makers and civil society to embed heritage interpretation in society.

Typically level 8 competences would be achieved through long standing professional experience at level 7 and growing responsibility for shaping the professional field. In the academic sector it is associated with theoretical and empirical research of heritage interpretation at PhD level.

Competence areas in the field of heritage interpretation

Research

Research is used here in a wide sense (not just academic research), and includes basic things like familiarisation with a site and a topic using popularised literature, investigating

and experiencing a site (phenomena that can be perceived by visitors, site infrastructure etc.), audience research and analysis of missions, goals and interests of the management and stakeholders, and inquiries with specialists. It is the basis for planning. However, planning and research are often iterative processes as new or more specific research questions may appear during planning and delivery.

More advanced research tasks may require a range of competences that can also include some competences which belong to lower EQF levels.

EQF level	Overview on research competences in the professional field of heritage interpretation:
3	To familiarize oneself with the site or protected area where one works or lives by learning from existing interpretation and from a limited range of popularised literature about the site.
4	<p>Content research</p> <p>To identify and evaluate potential content elements that</p> <ul style="list-style-type: none">a) support a given interpretive theme, which has been provided by a mentor / supervisor;b) relate to visitors' experiences, interests and needs <p>based on popularised literature about the site or museum where one works or lives.</p> <p>Phenomena</p> <p>To identify compelling phenomena (perceivable structures and features) that can be used for first-hand visitor experience and evaluate how they support a given interpretive theme.</p> <p>Supporting infrastructure</p> <p>To check the familiar site for potential problems of physical accessibility for visitors.</p> <p>Impact assessment</p> <p>To identify easily predictable threats of bringing visitors to a place, to its heritage assets and environment.</p>



5

Heritage interpretation

To familiarize oneself with publications on heritage interpretation and its philosophy to evaluate their relevance for one's own interpretive work.

Content research

To identify appropriate material for interpretation in the field of one's own thematic/regional specialisation, i.e. identifying inspiring, engaging and significant materials that can provoke interest in and contribute to revealing the significance of the heritage topic.

To identify potential content elements based on exchange with experts in the subject and on literature research in the field of one's own thematic/regional specialisation and evaluate the material with regard to a site's interpretive potential.

Phenomena

To evaluate unfamiliar sites within the field of one's own thematic/regional specialisation with regard to compelling and also less obvious phenomena that can be used for first-hand visitor experience.

Supporting infrastructure

To systematically assess a site for potential problems of physical accessibility and orientation for visitors.

Impact assessment

To assess a place in terms of hazards but also of aesthetics and atmosphere/ambiance and factors that could enhance or disturb the visitor experience.

6

Heritage interpretation

To critically evaluate technical literature on the philosophy, theory and practice of heritage interpretation in terms of relevance for interpretive planning and delivery practice in one's own working context.

Content research

To familiarize oneself with the academic heritage literature in a broader field of thematic or regional specialisation.

To evaluate original academic publications in the field of one's thematic/regional specialisation with regard to an unfamiliar site's interpretive potential.

To identify appropriate material for interpretation in the broader field of one's own thematic/regional specialisation, i.e. identifying inspiring, engaging and significant materials that can provoke interest in and contribute to revealing the significance of the heritage topic.

Audience and stakeholder research

To commission and/or design and carry out simple visitor research.

To research the market for potentially competing interpretation products and themes and to identify niches regarding themes and target audiences.

Site infrastructure

To assess a place, or planning documents, in terms of aesthetics, atmosphere / ambiance and factors that could disturb, or enhance, the visitors' interpretive learning experience.

Impact assessment

To systematically assess risks of bringing visitors and interpretive infrastructure for the integrity and authenticity of heritage assets including their environment.



7

Heritage interpretation

To critically evaluate technical literature on the philosophy, theory and practice of heritage interpretation in terms of relevance for advancing methodologies, methods and tools of interpretive practice in various working contexts.

To search for relevant theoretical background and good practice on interpretation in order to develop a proper methodology for problem solving and specific challenges.

To familiarise oneself with important technical and academic literature from neighbouring disciplines that are linked to heritage interpretation.

Content research

To evaluate unfamiliar sites with regard to compelling and also less obvious phenomena that can be used for first-hand visitor experience from multiple disciplinary perspectives.

To evaluate original and secondary literature from various disciplines related to a wide range of heritage sites/phenomena/objects with regard to interpretive themes, within and beyond disciplinary boundaries.

Audience and stakeholder research

To analyse various stakeholders' perspectives and interests related to heritage site/phenomena/objects.

To commission and/or design and carry out advanced visitor research.

To use academic expertise in the subject in order to achieve the organisation's educational mission and goals and the social and societal dimension of learning from the site's heritage.

8

Heritage interpretation

To critically reflect and advance heritage interpretation philosophy, theory and methodologies.

To research the common grounds and differences between heritage interpretation and neighbouring disciplines that can contribute to or benefit from heritage interpretation.

To research the contributions heritage interpretation can make for the society and policy making.

Planning

'Planning' builds on 'research', but it also involves 'management' competences (e.g. project management, compliance with legal requirements) and 'evaluation' competences (formative evaluation) which are covered in other sections of this document.

More advanced planning tasks may require a range of competences that can also include some competences which belong to lower EQF levels.

EQF level	Overview on planning competences in the professional field of heritage interpretation:
3	not applicable
4	<p>Interpretation principles</p> <p>To follow basic interpretation principles and philosophy while applying basic interpretive planning methods to prepare a simple guided walk at a familiar place.</p> <p>Follow guidance/instructions</p> <p>To integrate a briefing and follow advice from a mentor or supervisor while preparing a guided walk at a familiar place.</p>



4

Visitor orientation

To identify the needs of a given priority target audience and take them into account when preparing the tour.

To prepare questions, issues, inputs that provoke the target audience to reflect and to get involved.

To adapt one's own interpretive tour to meet the particular needs and interests of special target audiences.

Itinerary

To devise an itinerary that is suitable for the main target audience and does not negatively impact on heritage assets.

Conceptualisation

To devise a simple interpretive narrative that structures the main content elements in relation to perceivable phenomena along an itinerary.

Planning document

To write a basic outline interpretive plan that summarises the preparation for a simple interpretive walk.

5

Interpretation principles

To ensure compliance with interpretation principles and philosophy while applying interpretive planning methods for planning interpretive products of low complexity such as a guided walk or a self-guided trail.

Following guidance

To take guidance from an interpretive master plan, a mentor or supervisor into account, e.g. regarding communication goals, priority target audience, topics and locations.

Facilitation

To communicate, negotiate and solve problems within a project team and with important local stakeholders.

Visitor orientation

To define a priority target audience, and to tailor all planning and conceptualisation towards this target audience.

To define secondary target audiences whose special needs will be systematically addressed.

Itinerary

To develop itineraries based on the available phenomena, infrastructure and environment, taking into account the suitability for the targeted group of visitors, avoiding negative impacts on heritage assets, and considering the ambiance and factors that could enhance or disturb the experience.

Conceptualisation

To develop an interpretive theme within a familiar field (topic) for a familiar heritage site or place (where one is employed).

To conceptualise a narrative structure along the itinerary for the interpretive theme based on the available phenomena and other content elements.

To conceptualise basic plans for new or enhanced supporting infrastructure of low complexity such as trails and orientation systems which are needed to deliver a holistic interpretive visitor experience.

To influence visitors' behaviour and manage visitor flows through interpretation and supporting infrastructure.

To propose an interpretive product (a form of personal or media delivery) suitable for the setting and target audience.

Planning document

To produce and present an interpretive plan for an interpretive product with a sequence of stops that further elaborates the narrative, i.e. which content is to be delivered at which stop for which target audience in an organised/structured way.

To calculate a budget for the implementation of the interpretive plan.



6

Interpretation principles

To follow interpretation principles and philosophy while using up-to-date interpretive planning methodologies, methods and instruments.

Facilitation

To involve stakeholders via participatory planning processes, and to communicate, negotiate and solve problems in collaboration with the project team and employer (or customer).

Visitor orientation

To define a target audience profile, and to tailor all planning and conceptualisation towards the selected priority and secondary target audiences.

To identify issues, phenomena, views and events fit for the purpose of involving and actively engaging visitors in heritage interpretation and dialogue.

Itineraries

To develop itineraries based on the available phenomena, infrastructure and environment, taking into account suitability for the major target groups, avoiding negative impacts on heritage assets, and considering the ambiance and factors that could enhance or disturb the experience.

Conceptualisation

To develop interpretive themes based on materials that are mainly related to one's own disciplinary specialisation, also for unfamiliar heritage sites or places.

To conceptualise a multi-level narrative structure tailored to different target audiences along the itineraries for the interpretive theme based on the available phenomena and other content elements.

To conceptualise plans for new or enhanced supporting infrastructure of medium complexity such as exhibitions which are needed to deliver a holistic interpretive visitor experience.

To propose interpretive products and media suitable for the setting and the major target audiences.

Planning document

To produce and present a multiple target audience interpretive plan for the interpretive products with a sequence of stops that further elaborates the narrative and the use of media.

To calculate a budget for the implementation of the interpretive plan.

7

Interpretation principles

To devise tailor-made interpretive planning methodologies adapted to special and complex planning tasks in various contexts (e.g. complex multiple media exhibitions for a range of diverse target audiences or master plans for complex sites and destinations).

Facilitation

To involve experts from various disciplinary backgrounds as well as civil society and community stakeholders as appropriate through participatory planning processes.

To advise management regarding clarification of the organisation's strategies and goals related to heritage interpretation in order make better use of the interpretive potential of a site, collection, protected area or destination.

Visitor orientation

To devise innovative and tailor-made ways of involving and actively engaging visitors in heritage interpretation and dialogue.



7

Itinerary

To develop multiple complementary itineraries based on available phenomena, infrastructure and environment, taking into account the suitability for the major target groups, avoiding negative impacts on heritage assets, and considering the ambiance and factors that could enhance or disturb the experience.

Conceptualisation

To develop interpretive themes based on multi-disciplinary materials at a wide range of different types of museums, heritage sites, places or protected areas.

To conceptualise multi-perspective and innovative narrative structures tailored to different target audiences along the itineraries based on the available phenomena and other content elements.

To conceptualise plans for new or enhanced supporting infrastructure of higher complexity such as buildings of museums or visitor centres which are needed to deliver a holistic interpretive visitor experience.

To devise a range of complimentary interpretive products and media suitable for the setting and all priority and secondary target audiences.

Planning document

To produce and present a multiple target audience interpretive plan for the interpretive products with a sequence of stops that further elaborates the narrative and the use of media.

To produce and present a multiple target audience interpretive master plan comprising a limited number of heritage sites or museum units.

To calculate a budget for the implementation of a complex interpretive plan.

8

Facilitation

To involve management of several and diverse policy matters, civil society organisations as appropriate through participatory processes in master planning.

Conceptualisation

To develop a thematic framework for a number of sites and museums.

To devise a spatial framework of complimentary interpretive products and supporting infrastructures for diverse target audiences that support the mission and strategy of a large organisation and societal goals.

Planning document

To produce strategic master plans for the development of natural and cultural heritage interpretation for large destinations or for one heritage sector at regional and country levels.

Personal delivery

This area of competences covers the competences which are required to deliver personal interpretation based on an interpretive plan (or based on interpretive planning competences where no proper plan is available). Competences needed to direct personal delivery, e.g. to coordinate and supervise a team of personal interpreters, are covered in the area of 'management competences'.

More advanced personal delivery tasks may require a range of competences that can also include some competences which belong to lower EQF levels.



EQF level	Overview on personal delivery competences in the professional field of heritage interpretation:
3	<p>Responding</p> <p>To make visitors to a place feel welcome.</p> <p>To provide guidance for visitors (to help them choose what they want to see/do and how to get there).</p> <p>To respond autonomously and appropriately to priority audience segments with a familiar range of attitudes, views and feelings about local heritage and values.</p>
4	<p>Presenting</p> <p>To speak fluently and articulate clearly in a way that captures and holds attention.</p> <p>To explain topics and ideas of limited complexity in simple words and images that are easily accessible to non-expert audiences.</p> <p>To make appropriate use of props and supporting media.</p> <p>To deliver a simple interpretive narrative that implements an interpretive plan, captures interest, holds attention and helps visitors build in personal meanings and connections with the heritage resource.</p> <p>To play a minor role in costumed live interpretation under guidance of an experienced live interpreter.</p> <p>Guiding/involving</p> <p>To lead groups up to medium size (up to 20) safely and comfortably through an itinerary.</p> <p>To induce and manage group processes for small/medium sized and rather “uncomplicated” groups. (To evoke and manage questions, issues, inputs and dialogues among a rather homogeneous group of visitors.)</p> <p>Responding</p> <p>To respond autonomously and satisfactorily to priority and secondary audience segments with a familiar range of attitudes, views and feelings about local heritage and heritage values. And to respond appropriately to all others who express with unusual attitudes and views.</p> <p>To flexibly respond to the needs and interests of people while keeping on track regarding theme and timing.</p> <p>To autonomously and flexibly respond to unforeseeable challenges (e.g. an emergency) in an appropriate way at one’s site.</p> <p>To appropriately answer questions on basic facts and core concepts related to the site’s main thematic focus.</p>
5	<p>Presenting</p> <p>To explain more complex topics and ideas which are connected to a site’s main themes, e.g. with conflicting perspectives, in simple words and images that are easily accessible for non-expert audiences.</p> <p>To develop and make appropriate use of props and supporting media that illustrate the content.</p> <p>To deliver an interpretive narrative in a flexible way that relates to the visitors’ backgrounds while keeping on track regarding theme, timing and learning goals outlined in the interpretive plan.</p> <p>To help visitors with various and diverse backgrounds build in personal meanings and connections with the heritage resource.</p> <p>To ensure that the interpretive presentation of a theme, despite inevitable simplifications for non-expert target audiences, is credible, appropriate and accurate.</p> <p>To play a role in costumed live interpretation under the guidance of an experienced live interpreter.</p> <p>Guiding/involving</p> <p>To lead larger groups of more than 20 participants autonomously, responsibly, safely and comfortably through an itinerary.</p> <p>To induce and manage group processes for groups of people with diverse backgrounds. (To evoke and manage questions, issues, inputs and dialogues among a diverse group of visitors.)</p>



5	<p>Responding</p> <p>To provide guidance for visitors beyond one's own site (to help them choose what they want to see/do and how to get there) related to the main thematic focus of the site.</p> <p>To respond autonomously and appropriately to diverse audiences with a wider range of attitudes, views and feelings about local heritage and heritage values.</p> <p>To autonomously and flexibly respond to unforeseeable challenges (e.g. an emergency) in an appropriate way in relatively safe environments.</p> <p>To appropriately answer questions on facts, concepts and ideas related to the site's main thematic focus and its broader context, and connect the answer with a thematic message (e.g. as roving interpreter).</p>
6	<p>Presenting</p> <p>To deliver, based on an interpretive plan, an interpretive narrative in a flexible way that relates to a mixed and incoherent audience while keeping on track regarding theme, timing and learning goals.</p> <p>To facilitate interpretive experiences and learning processes through a range of different forms of personal interpretation (e.g. roving interpretation, guiding, talks, performances, costumed live interpretation).</p> <p>To direct a team delivering advanced forms of multi-person interpretation, such as performances, costumed live interpretation with different characters.</p> <p>To ensure that the interpretive presentation of a theme which involves multiple perspectives, despite inevitable simplifications for non-captive target audiences, is well balanced, credible, appropriate, transparent and accurate.</p> <p>Guiding/involving</p> <p>To lead groups of an appropriate size autonomously and responsibly in complex and potentially dangerous environments.</p> <p>To coordinate assistant guides in order to lead large groups safely and comfortably through an itinerary in a complex environment.</p> <p>To induce and manage group processes for groups of people with diverse backgrounds and controversial beliefs. (To evoke and manage demanding questions, controversial issues and inputs and critical dialogues among a very diverse group of visitors.)</p> <p>Responding</p> <p>To respond autonomously and appropriately to diverse audiences with a range of different attitudes, views and feelings about heritage and related values.</p> <p>To appropriately answer questions on facts, concepts and ideas related to the site and its broader thematic context.</p> <p>To autonomously and flexibly respond to unforeseeable challenges (e.g. an emergency) in an appropriate way in potentially dangerous environments.</p>
7	<p>Presenting</p> <p>To ensure that the interpretive presentation of a complex theme that involves multiple disciplines, despite inevitable simplifications for non-captive target audiences, is well balanced, credible, appropriate and accurate.</p> <p>To further develop and deliver guidance, tools and techniques in personal delivery skills for heritage interpretation.</p> <p>Responding</p> <p>To accurately respond to in-depth questions by an audience of academic experts in a discipline which is related to the heritage site, and to connect the answer with the interpretive theme, where appropriate.</p>
8	not applicable



Media delivery

This area of competences covers the competences which are required to produce interpretive media content and to design interpretive media based on an interpretive plan (or interpretive planning competences where no proper plan is available). Competences needed to direct media delivery,

e.g. to coordinate and supervise the different pieces of work, to write specifications, to brief various specialists and to supervise their performance, are covered in the area of 'management competences'.

More advanced media delivery tasks may require a range of competences that can also include some competences which belong to lower EQF levels.

EQF level	Overview on media delivery competences in the professional field of heritage interpretation:
3	not applicable
4	<p>Text contents</p> <p>To write simple interpretive texts for a leaflet or panels about a familiar topic at a familiar place one is affiliated to for a domestic average audience, based on clear directions about an interpretive narrative of limited complexity.</p> <p>Visual contents</p> <p>To select appropriate photos and illustrations that highlight important features in relation to the interpretive narrative.</p> <p>To produce photos of decent quality that highlight important features in relation to the interpretive narrative.</p> <p>To produce illustrations of decent quality that highlight the important features in relation to the interpretive narrative.</p> <p>Media Design</p> <p>To create simple interpretive layouts for panels or brochures that communicate well.</p>
5	<p>Text contents</p> <p>To write interpretive texts and storyboard dialogues layered for priority and secondary target audiences about a familiar place and topic.</p> <p>Visual contents</p> <p>To produce or select quality photos that highlight the important features in relation to the text and to process photos for print.</p> <p>To produce interpretive illustrations that highlight important features and visualise concepts and relationships supporting the interpretive narrative.</p> <p>To produce simple interpretive films that highlight important features and visualise concepts and relationships supporting the interpretive narrative.</p> <p>To produce three-dimensional interpretive installations, such as still and interactive models, dioramas that highlight important features and visualise concepts and relationships supporting the interpretive narrative.</p> <p>Media Design</p> <p>To create interpretive layouts for panels or brochures that communicate well for multiple target audiences.</p> <p>To design cost-effective and sustainable audio, audio-visual and/or electronic devices that go well with the interpretive narrative, artwork and ambiance of the place.</p> <p>To design simple electronic media that integrate interpretive texts (written and spoken), sounds and visualisations supporting the interpretive narrative.</p> <p>To design cost-effective and sustainable mounts for interpretive media that go well with the interpretive narrative, artwork and ambiance of the place.</p>



6

Text contents

To write, on the basis of an interpretive plan, multi-layered interpretive texts and storyboard dialogues related to one's main academic and regional specialisations that are tailored towards diverse media for different target audiences.

To ensure that the interpretive presentation of a theme that involves multiple perspectives, despite inevitable simplifications for non-captive target audiences, is well balanced, credible, appropriate, transparent and accurate.

Visual and audio contents

To produce interpretive films with a team of actors that highlight important features and visualise concepts and relationships supporting the interpretive narrative.

To develop sophisticated three-dimensional interpretive installations, such as innovative interactive models, that highlight important features and visualise concepts and relationships supporting the interpretive narrative.

To develop interpretive electronic reconstructions and animations, that highlight important features and visualise concepts and relationships and create an atmosphere supporting the interpretive narrative.

Media Design

To design cost-effective and sustainable, multi-layered audio or audio-visual devices that go well with the interpretive narrative, artwork and ambiance of the place.

To design simple electronic media that integrate interpretive texts (written and spoken), sounds and visualisations supporting the interpretive narrative.

To design cost-effective and sustainable mounts for interpretive media that go well with the interpretive narrative, artwork and ambiance of the place.

7

Text contents

To write, on the basis of an interpretive plan, complex multi-layered interpretive texts and storyboard dialogues related to interdisciplinary content that are tailored towards diverse media for different target audiences.

To ensure that the interpretive presentation of a complex, multiple disciplinary theme, despite inevitable simplifications for non-captive target audiences, is well balanced, credible, appropriate, transparent and accurate.

Visual and audio contents

To develop complex interpretive virtual reconstructions and animations for electronic media, that highlight important features and visualise concepts and relationships and create an atmosphere supporting the interpretive narrative.

Media Design

To design state-of-the-art interactive electronic media that integrate interpretive texts (written and spoken), sounds and visualisations supporting the interpretive narrative.

8

not applicable



Evaluation

This area covers the self- and external evaluation competences of interpretive product development and delivery. Evaluation of data, phenomena or materials are part of the research and planning areas. Evaluation of

different options and staff competences are covered by the management area of competences.

More advanced evaluation tasks may require a range of competences that can also include some competences which belong to lower EQF levels.

EQF level	Overview on evaluation competences in the professional field of heritage interpretation:
3	To reflect on lessons to learn from visitor encounters.
4	To seek informal visitor feedback during delivery and flexibly adjust and optimise one's own delivery. To employ simple methods of self-evaluation and peer-to-peer feedback in order to improve the quality of personal interpretation delivery, e.g. in terms of visitor satisfaction. To employ post-visit evaluation techniques that have been developed and will be analysed by an internal or external evaluator.
5	To choose and employ simple methods of formative evaluation, testing and optimisation as part of interpretation planning and delivery for an interpretive product. To prepare and perform peer-review processes. To adapt and employ summative evaluation techniques jointly with an internal or external evaluator. To commission to competent external interpretation evaluators in order to gain evidence of performance and suggestions for improvement.
6	To define indicators and measurement methods in order to monitor the level of performance of interpretation regarding the effects on different audience segments. To design methodologies and cost-effective methods of formative evaluation and testing in order to optimise interpretation planning and delivery. To design and carry out summative evaluation studies for interpretive products of a site that employ appropriate methods to measure the achievement of management objectives.
7	To design advanced evaluation studies that evaluate the learning outcomes and/or economic and societal impacts of a heritage organisation's interpretation policy regarding its mission and goals for one or more heritage sites.
8	To design advanced evaluation research that evaluates the impacts of heritage interpretation in relation to economic and societal goals and the effectiveness of policies and programmes at local, regional, national or EU level. To develop policy recommendations based on evaluation data.



Promotion and advocacy

Appropriate promotion is an important and often underestimated part of the professional field of heritage interpretation. It is the first step on the interpretive visitor

experience chain because the process of addressing the potential audience by raising initial interest and adequate expectations starts with promotional messages. Advocacy of interpretation and its benefits are also covered in this area.

EQF level	Overview on promotional competences in the professional field of heritage interpretation:
3	Interpretive offers To raise interest and visitors' expectations of a place's heritage and its interpretive products through informal talks.
4	Interpretive offers To locally promote a guided tour or an event by disseminating basic information, using relevant distribution channels such as heritage and tourism organisations and local media.
5	Interpretive offers To write promotional texts that are tailored to the priority target audience and raise appropriate expectations regarding interpretive products and events. To design promotional flyers and posters for interpretive products and events. To promote one's own site and its interpretive products through the internet. To appropriately promote an interpretive product or an event through regional mass media, such as newspapers and radio, by preparing a press release. To develop interpretive souvenirs that pay tribute to the heritage site or object and are related to the interpretive narration and place characteristics. To distribute promotional materials such as souvenirs available on site and locally. Business To promote one's own freelance or small and medium-sized interpretive business towards potential clients.
6	Interpretive offers To devise a promotion plan for interpretive products and programmes. To write promotional texts that are tailored to various specified target audiences and raise appropriate expectations regarding interpretive products. To design and produce brochures, flyers, posters for the promotion of diverse interpretive products of various sites that belong to a heritage organisation or are part of a tourist destination. To promote interpretive products towards heritage tour operators. To contribute to the development of the promotional campaign for a site, organisation or tourism destination. Advocacy To ensure that the interpretive communication strategy is properly transferred into marketing strategies. To promote professionalism in heritage interpretation within an existing organisation, a local community and a tourism destination. To provide advice for marketing units at tourism destinations and heritage organisations on adequate promotion of interpretive sites. Business To develop and implement a marketing strategy for one's own interpretive business.



7	<p>Interpretive offers</p> <p>To develop and deliver guidance, tools and techniques for marketing interpretive heritage sites. To develop a marketing strategy for complex interpretive heritage sites, destination management bodies and heritage organisations.</p> <p>Advocacy</p> <p>To promote professionalism in heritage interpretation at senior management and policy making level within a bigger organisation or a bigger destination.</p>
8	<p>Advocacy</p> <p>To promote the profession of heritage interpretation at regional, national and international policy making bodies and civil society organisations.</p>

Management

Almost every person who is involved in developing and delivering interpretation needs various management competences, such as self-management, ensuring compliance, project management etc. Thus a number of management competences are connected with all planning

and delivery of interpretation. Management competences in this document are closely related to the 'autonomy and responsibility' dimension of the EQF.

More advanced management tasks may require a range of competences that can also include some competences which belong to lower EQF levels.

EQF level	Overview on management competences in the professional field of heritage interpretation:
3	not applicable
4	<p>Self-management</p> <p>To reliably deliver personal interpretation on time in an appropriate manner. To self-reflect on one's own level of competences in specific working contexts in heritage interpretation of lower complexity. To, identify professional development opportunities in order to acquire or enhance one's own competences in the field of heritage interpretation.</p> <p>Compliance</p> <p>To prepare and deliver personal interpretation in compliance with an interpretive plan, the organisation's mission and goals and specific directions given by the supervisor. To accountably comply with legal requirements for guiding a group of adults and/or children.</p>
5	<p>Self-management</p> <p>To reliably deliver tasks and deliverables on time in an appropriate manner.</p> <p>Compliance</p> <p>To responsibly ensure compliance of interpretation products of low complexity, such as a guided walk or a self-guided trail, with professional ethics, an interpretive (master) plan, the organisation's mission, goals and policies and specific directions given by senior management.</p>



- 5 To accountably comply with legal requirements for interpretation products of low complexity, such as a guided walk or a self-guided trail (e.g. taxes, insurances, legal liabilities and approval procedures).
- To supervise volunteers and junior staff regarding the delivery of personal interpretation in compliance with legal requirements, the organisation's interpretation policy and professional ethics.
- To recognise which competences in the field of heritage interpretation are needed to effectively perform in a specific working context.

Personnel

To coordinate a team of personal interpreters, volunteers and staff, with regard to cost-effective financial and human resources allocation, timing and monitoring quality.

To evaluate a person's level of competences in the field of heritage interpretation for working contexts of low complexity.

To evaluate whether it is more cost-effective/appropriate to invest in continuous professional development (CPD) of one's own interpretation personnel or to contract an external consultant in order to achieve a specific task or address a specific challenge in a context of low to medium complexity.

To coordinate maintenance works for interpretive facilities and supporting infrastructure.

Project management

To coordinate the planning and delivery of media-based interpretive products of low complexity, such as a self-guided trail, with regard to cost-effective financial and human resources allocation, responsibilities, monitoring and change management.

To coordinate works of low complexity ensuring that all fit together in order to facilitate a holistic interpretive visitor experience.

To negotiate specifications, to write briefs and terms of reference and to supervise the compliance of components for interpretive products of low complexity, such as interpretive writing, illustrations, layout of print products, design, production and installation.

To negotiate specifications, to write briefs and terms of reference and to supervise the compliance of components for basic supporting infrastructure such as paths and orientation systems.

To negotiate specifications for commissioning external evaluation and interpretive plans of medium to higher complexity and to ensure an appropriate budget.

Business

To manage one's own freelance business or small company in interpretive guiding or a branch of interpretive media delivery such as writing, illustrations etc. (cf. media delivery).

6 Compliance

To responsibly ensure compliance of various interpretation products of medium complexity such as exhibitions with professional ethics, an interpretive (master) plan, the organisation's mission, goals and policies and directions given by the senior management.

To accountably comply with legal requirements for various interpretation products, such as performance events and exhibitions (e.g. taxes, insurances, legal liabilities and approval procedures).

To supervise personnel regarding the planning and delivery of interpretation in compliance with legal requirements, the organisation's interpretation policy and professional ethics.

To recognise which competences in the field of heritage interpretation are needed to effectively perform in a wider range of working contexts of higher complexity.

Personnel

To lead a small interpretation unit in charge of various interpretive products at one site, museum or protected area with one main disciplinary focus, regarding to cost-effective financial and human resources allocation, timing, and maintaining quality.

To evaluate a person's level of competences in the field of heritage interpretation for working contexts of medium complexity.



6

To evaluate whether it is more cost-effective/appropriate to invest in CPD for one's own interpretation personnel or to contract an external consultant in order to achieve a specific task or address a specific challenge in a context of high complexity.

To identify training and continuous professional development (CPD) needs for interpretation staff, to allocate budgets for CPD and to organise in-house training where appropriate.

Project management

To coordinate the planning and delivery of media-based interpretive products of medium complexity, such as performances and exhibitions, with regard to cost-effective financial and human resources allocation, responsibilities, milestones and monitoring and change management.

To coordinate works of medium complexity ensuring that all fit together in order to facilitate a holistic interpretive visitor experience.

To negotiate specifications, to write briefs and terms of reference and to supervise the compliance of components for interpretive products of medium complexity, such as interpretive writing for diverse audiences, exhibition design, production and installation.

To negotiate specifications, to write briefs and terms of reference and to supervise the compliance of components for supporting infrastructure of medium complexity such as interior design for smaller museums and visitor centres and landscape architecture.

To negotiate specifications for commissioning external evaluation and interpretive plans and master plans of high complexity and to ensure appropriate budgets.

Business

To manage one's own freelance business or small company in interpretive guiding or a branch of interpretive media delivery such as writing, illustrations etc. (cf. media delivery).

Strategic

To derive realistic goals for interpretive learning and visitor management from the organisations' missions and goals while taking goals and interests of other stakeholders into account.

To develop strategies and guidelines for integrating site protection, visitor safety and interpretation.

To negotiate with the senior management appropriate human and financial resources for cost-effective interpretation planning and delivery of non-personal and personal interpretation ensuring appropriate quality.

To develop strategies in the areas of sponsoring, crowd funding, fees, donations acquisition and merchandising.

7

Compliance

To responsibly ensure for various interpretation products at various sites, protected areas or museums compliance with professional ethics, interpretive (master) plans, missions, goals and policies and directions given by senior management.

To coordinate works of high complexity ensuring that all fit together in order to facilitate a holistic interpretive visitor experience.

To accountably comply with legal requirements (e.g. taxes, insurances, legal liabilities and approval procedures), also for complex interpretive sites and protected areas dealing with a comprehensive range of interpretation products, such as visitor centres, national parks, bigger museums with several permanent and temporary exhibitions.

To supervise personnel, at various sites, regarding the planning and delivery of interpretation in compliance with legal requirements, the organisation's interpretation policy and professional ethics.

Personnel

To lead a bigger interpretation unit in charge of a comprehensive range of interpretive products at several sites, museum branches or protected areas with multiple disciplinary contents, regarding cost-effective financial and human resources allocation, timing, maintaining quality and change management.

To devise CPD plans in heritage interpretation for an organisation, setting targets for training and monitoring progress towards them.

To negotiate learning agreements with volunteers and staff and to advise people on career development in heritage interpretation.



7 To formally validate and certify the competences of a person in the field of heritage interpretation achieved through informal learning.

Project management

To coordinate the planning and delivery of media based interpretive products of higher complexity, such as visitor centres and large, multi-layered exhibitions, with regard to cost-effective financial and human resources allocation, responsibilities, milestones and monitoring and change management.

To negotiate specifications, to write briefs and terms of reference and to supervise the compliance of components for interpretive products of higher complexity, such as interpretive writing covering multiple disciplinary and stakeholder perspectives for diverse audiences, exhibition design, production and installation.

To negotiate specifications, to write briefs and terms of reference and to supervise the compliance of components for supporting infrastructure of higher complexity such as architecture and interior design for bigger museums and visitor centres.

Business

To manage one's own freelance business or an SME company that offers services in interpretive planning, master planning and in leading the implementation of complex interpretation products.

Strategic

To derive realistic interpretive learning goals and visitor management goals from any organisation's missions and aims while taking aims and interests of other stakeholders into account.

To provide advice to senior decision makers in further developing their organisation's mission, goals, strategies and policies in order to make optimal use of interpretation opportunities.

To develop strategies, policies and guidelines for integrating site protection, visitor safety and interpretation for various sites or branches of an organisation.

8 To develop and deliver guidance, tools and techniques for managing the implementation of heritage interpretation for a larger heritage organisation which is in charge of many sites or protected areas.

To consult policy makers on regional to international levels on improving framework conditions for cost-effective planning and delivery of non-personal and personal interpretation ensuring an appropriate quality.

To consult policy makers on regional to international levels on opportunities to increase employment as well as societal and economic benefits through raising professionalism in heritage interpretation.



Training

EQF level	Overview on training competences in the professional field of heritage interpretation:
3	not applicable
4	not applicable
5	<p>To <i>adapt</i> training curricula in a competence-oriented way in order to suit the professional development needs of a group of learners in-house at one's own heritage site.</p> <p>To deliver tailored in-house training to meet the needs of volunteers, junior staff and stakeholders at one's own heritage site.</p> <p>To mentor volunteers and junior staff at one's own heritage site.</p>
6	<p>To <i>design</i> training curricula in a competence-oriented way in order to suit the professional development needs of a group of learners who work in the field of heritage interpretation.</p> <p>To deliver tailored training to meet the needs of learners who work in a sector of heritage interpretation in which one is competent and experienced.</p> <p>To mentor heritage interpretation employees who work in a sector of heritage interpretation in which one is competent and experienced.</p>
7	<p>To design curricula for competence-oriented higher education courses or programmes in the field of heritage interpretation.</p> <p>To design curricula for competence-oriented CPD courses and programmes at higher education level for learners working in the field of heritage interpretation and its management.</p> <p>To deliver introductory courses at higher education level and/or advanced courses that help students to gain specialised competences.</p> <p>To mentor heritage interpretation staff, including senior staff or business owners, who work in a sector of heritage interpretation in which one is specialised.</p> <p>To formally validate and certify the competences of a person in the field of heritage interpretation achieved through formal, non-formal and informal learning.</p>
8	To assess the market for training in the field of heritage interpretation and produce appropriate training products.



How to use the InHerit competence matrix

The InHerit competence matrix offers a reference framework for the entire professional field of heritage interpretation and allows the flexibility to address the diverse demands within the professional field.

This framework aims to provide guidance on which competences should be considered at different levels when developing curricula for formal vocational qualifications, higher education degrees or certified Continuous Professional Development (CPD) training courses related to the professional field of heritage interpretation. It can also be useful for structuring other non-formal and informal ways of professional development for heritage interpreters.

- Defining and comparing qualifications, professional development programmes and courses

Mapping and documenting competences on the EQF can have a significant advantage: it allows for flexibility to create various qualifications and degrees according to the needs of the labour market in different countries that can target a more limited or a wider range of real world contexts (e.g. interpreters specialised in nature interpretation with self-guided trails, interpretive guides for a specific archaeological site such as the Colosseum in Rome, interpretive consultants specialised in media interpretation working for various clients). A qualification may combine high level competences in a field of specialisation with more basic competences in other areas of competence.

In line with the logic of the competence-oriented approach the following procedure is recommended:

1st step – specification of professional development needs that the qualification aims to address: this includes specifying/defining the range of targeted learners, the range of their roles and the range of their working contexts.

Example for an interpretive guides training: a regional body identifies a need to qualify guides employed at various museums, natural and cultural sites as well as self-employed freelance guides active in the region. They should also be able to do limited research for a theme which they have an affinity to, and to plan their guided tours. At a number of some small sites these guides should also be able to deliver some basic interpretation using panels and leaflets. On the other hand the freelancers need to be able to manage their small guiding business.

2nd step – selection of those competences from the competence profile that are relevant for these specified professional development needs and contexts. They should be reformulated in a more specific way, where appropriate.

Example for a regional interpretive guides training: Even though the most important competences in this example are on EQF level 5, others from lower levels are also considered relevant. Not all competences at one EQF level need to be addressed by the new qualification, and some generic areas of competence are not covered at all by this example qualification.

The following two tables illustrate a possible selection of competences for a qualification for a level 5 interpretive guide that addresses the training and professional development need of the above example.



EQF level	CORE COMPETENCE AREAS:			
	Research	Planning	Personal delivery	Media delivery
3			<p>Responding To make visitors of a place feel welcome.</p>	
4	<p>Phenomena To identify compelling phenomena that can be used for first-hand visitor experience...</p> <p>Supporting infrastructure To check the site for... visitor accessibility.</p> <p>Impact assessment To identify... threats to the heritage assets... of bringing visitors.</p>	<p>Interpretation principles To follow basic interpretation principles and philosophy...</p> <p>Follow guidance/ instructions To integrate briefing and advice from a mentor or supervisor while preparing a guided walk...</p> <p>Visitor orientation To identify the needs of a given priority target audience and take them into account when preparing the tour. (more to be selected...)</p>	<p>Presenting To speak fluently...in a way that captures and holds attention.</p>	<p>Optional (1 – basic media):</p> <p>Text contents To write simple interpretive texts for a leaflet or panels about a familiar topic at a familiar place one is affiliated to for a domestic average audience, based on clear directions about an interpretive narrative of limited complexity.</p> <p>Visual contents To select appropriate photos and illustrations that highlight important features in relation to the interpretive narrative.</p>
5	<p>Content research To identify appropriate material for interpretation in the field of one's own thematic / regional specialisation that can provoke interest in and reveal the significance of the heritage topic.</p>	<p>Itinerary To develop itineraries based on the available phenomena, infrastructure and environment, taking into account the suitability for the targeted group of visitors, avoiding negative impacts on heritage assets, and considering the ambiance and factors that could enhance or disturb the experience.</p>	<p>Presenting To explain more complex topics that relate to a site's main themes, e.g. with conflicting perspectives... To develop and make appropriate use of props and supporting media To deliver an interpretive narrative in a flexible way that relates to the visitors' backgrounds...</p>	



5	To identify potential content elements based on exchange with experts in the subject and on literature research in the field of one's own thematic/ regional specialisation and to evaluate the material with regard to a site's interpretive potential.	<p>Conceptualisation</p> <p>To develop an interpretive theme within a familiar field (topic) for the familiar heritage site or place (where one is employed).</p> <p>To conceptualise a narrative structure along the itinerary for the interpretive theme based on the available phenomena and other content elements.</p>	<p>Guiding/involving</p> <p>To lead groups up to larger size autonomously, responsibly, safely and comfortably...</p> <p>To induce and manage group processes for groups of people with diverse backgrounds...</p> <p>Responding (more to be selected...)</p>
---	--	--	---

EQF level	GENERIC COMPETENCE AREAS:			
	Evaluation	Promotion	Management	Training
3				
4	To seek informal visitor feedback during delivery and flexibly adjust and optimise their own delivery. To employ simple methods of self-evaluation and improve the quality of personal interpretation delivery, e.g. in terms of visitor satisfaction.	Interpretive offers To locally promote a guided tour or an event by disseminating basic information through heritage and tourism organisations and local media.	Self-management To reliably deliver personal interpretation on time in an appropriate manner. To self-reflect on one's own level of competences in specific working contexts in heritage interpretation of lower complexity. To identify professional development opportunities .	
5		<u>Optional (1 – basic media):</u> Interpretive offers To write promotional texts that are tailored to the priority target audience and raise appropriate expectations regarding interpretive products and events. To design promotional flyers and posters for interpretive products and events.	Compliance To responsibly ensure compliance of interpretive guiding with professional ethics, an interpretive (master) plan, an organisation's mission, goals and policies and specific directions given by senior management.	



To promote one's own site and its interpretive products through the internet

Optional (2 – freelancers):

Business

To promote one's own freelance interpretive guiding service towards potential customers.

To accountably comply with legal requirements for guided walks (e.g. taxes, insurances, legal liabilities and approval procedures).

Optional (1 – basic media):

Project management

To negotiate specifications, to write briefs and terms of reference and to supervise the compliance of layout of print products, panel design, production and installation.

Optional (2 – freelancers):

Business

To manage one's own freelance interpretive guiding business.

Other course providers would focus on different aspects and include other competences, or similar competences at a lower or higher level, in their training programme. Course providers are flexible to tailor their offers to the needs of learners and employers in various contexts.

Through referring a qualification and training programme to the InHerit competence framework, the competences which a course promises to address in terms of developing the learners' ability to perform in a defined range of real world contexts, will become more transparent.

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.

- Curriculum development

Building upon a specified competence profile, the next step is to determine the relevant learning outcomes in terms of knowledge, skills and attitudes for every competence.

curriculum outline⁵⁵ then describes the appropriate learning environments that reflect typical real world situations from the range of contexts. Finally, methods and methodologies to facilitate learning in a competence oriented way and course material need to be devised, as a support to reach the aspired learning outcomes.

- Writing job profiles

Employers in the heritage interpretation field may find the InHerit competence matrix useful as a tool to systemically devise a job profile for an employee position or a contractor. It can be helpful to determine which competences are essential or 'nice to have', and which proficiency levels are needed. Again, the range of working contexts and the chosen competences should then be specified for a specific position in the organisation.

- Training needs assessment

InHerit competence descriptions might be useful for training

⁵⁵ Three examples for curriculum outlines have been developed within the InHerit project in order to demonstrate this approach.(see www.interpretingheritage.eu)



needs assessments for staff already employed. It can provide some direction for individual learning agreements and a more needs-driven approach to Continuous Professional Development and lifelong learning of adult education staff.

Some conclusive remarks

With this competence matrix the InHerit team developed a rather innovative approach of connecting competence-orientated professional development with the EQF, the European Qualifications Framework. Normally the EQF is used to map qualifications on levels in knowledge, skills and “competences” which rather describe levels of autonomy and responsibility.

This approach did not work for heritage interpretation. The InHerit team could not find a satisfactory answer to the question of what EQF level would be adequate for the position of a “heritage interpreter”. After long discussions it became clear that there are many different working contexts which require different sectors of knowledge and skills that can be more or less relevant for practices. Consequently, it does not make much sense to define for InHerit one single profession of the ‘heritage interpreter’. At a European scale the large professional field as a whole needs to be taken into consideration.

The solution has been to analyse the entire professional field and to map all competences that are relevant for this professional field on adequate levels of the EQF. This matrix is a first attempt. It will certainly miss some aspects, and there will be scope to improve some wordings as well as the structure and the assignments to competence areas.⁵⁶

At the same time, this approach focuses on competences which we defined as “a person’s ability to perform a particular task or activity in a specified range of real world contexts”. This definition is formulated from the perspective of practice

and the needs of heritage organisations, i.e. employers of interpreters. Knowledge, skills and attitudes as learning outcomes of training or higher education programmes are only a means to the end of becoming competent. For the InHerit team it was fruitful first analyse which competences are required to serve a need in the professional practice, and only then develop a curriculum outline that addresses these competences. This step provides a useful basis from which it is easier and more transparent to analyse the knowledge, skills and attitudes that correspond to these competences.

Maybe this approach to map competences of an entire professional field to the EQF levels can be fruitful for other professional fields as well. For the emerging field of heritage interpretation it was, at least, an interesting exercise to gain an overview over its breadth and diversity.

⁵⁶ The matrix is also available in form of two large tables on www.interpretingheritage.eu



CHAPTER 6

PROFESSIONAL DEVELOPMENT OF HERITAGE INTERPRETERS

Jaap van Lakerveld & Guy Tilkin





How can people be trained to become good heritage interpreters

Now that we have outlined the meaning of heritage interpretation, its principles, its goals and the success factors as well as the ethics involved, we turn to the ways in which heritage interpreters may be educated and trained. If any doubts still remain about whether a heritage interpreter is an educator, this doubt certainly does not apply to the educators and trainers of heritage interpreters. They are educators. To them it is important to know what may be applicable and effective ways of training and educating heritage interpreters. This chapter is devoted to this issue. First we reflect on the learning processes of the adult learners heritage interpreters. Then we describe the competence oriented approach we consider effective in educating adult (professional) learners.



Bjornlandet (SE)

Adult professional learning

Heritage interpreters, as stated above, in their own way may be considered educators and in many instances adult educators. Apart from being adult educators, or maybe

because they are, they may also be considered adult learners. They continuously develop. They develop their knowledge of the phenomena or sites they interpret; they develop in their ability to engage their visitors in processes of interpretation and learning. And last but not least they continuously develop their ability for lifelong learning and their own professional development. Their attitude can inspire visitors to be lifelong learners themselves.

Whether the interpreter is a professional or a volunteer, he or she is part of these lifelong processes mentioned. Throughout their lives as interpreters they develop competences that allow them to do their interpretative work, confronted with the ever changing needs and demands of their audiences, and in view of the technological, natural and societal developments. This chapter is devoted to this process of (lifelong) professional development.

Competence oriented learning and training approach

Competence based learning and competence based training and education do not rely on traditional teaching situations. Competence oriented learning is based on the idea that the learners learn by experience and discovery. This concept has an impact on how learners may be educated. The idea is that adult learners/trainees need to be actively involved in the learning situation. They learn best in meaningful contexts, and in co-operation and interaction with others and with their environment. Thus they enable themselves to acquire and construct knowledge, and check and cross-check their newly constructed ideas with those of others. Of course this implies no denial of the importance of teaching or training; it emphasises the necessity of teaching in a highly responsive and learner-centred way without neglecting the commitment of showing learners new horizons and perspectives and enthusiasm for things they may never have heard of yet. In the case of the professional development of heritage interpreters, they are the learners themselves and they are the ones who need training in order to become heritage interpreters or in



order to maintain or upgrade their competences as such.

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 the approach

The most distinctive features of a competence oriented approach may be summarized as follows:

Meaningful contexts

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.

You are working as the heritage manager in a small town. Together with the tourist office you are responsible for the organisation of guided tours through the city centre. These tours are usually standardised, but recently you were asked whether you might be willing to have a special guided tour for a group of medical doctors who happen to be in town for a conference. They would be very interested in a guided tour somehow related to their work, but since they intend to bring their partners, the tour should not be focused on medical aspects only. Select a small town you know, one suitable for this activity. Sketch an outline of how you would organise your tour. Present your tour outline to others and discuss its qualities.

Room for initiative and creativity

In order to acquire competence(s), learners should be given opportunities to take initiatives. This is a vital condition since competence implies taking initiatives, being creative and seeking to fulfil one's own ambitions. Competences are developed by the learners; the trainers facilitate this process with their suggestions, feedback and, incidentally, their input.

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 competences in their own learning itinerary. This is what social constructivism is about. Co-operation and interaction are both domains and vehicles of learning. In the case of heritage interpreters the others may include colleagues, peer learners, trainers, but also visitors/members of the target group or site context.

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.



During a visit to a natural park, a guide shows the visitors various animals and plants. One of them is the kingfisher, a beautiful blue bird.



Closed questions would be: “What kind of bird do you think it is?” or “Do you know where kingfishers have their nests?”. Closed questions will often lead to simple and brief answers. If, on the other hand, the guide asks questions like: “Why do you think a kingfisher is so blue?”, a discussion may spark off about whether it is blue, or whether it is just an effect of the sunlight on the feathers. People may wonder how the bird living in deep holes along riversides keeps itself so immaculately clean, some may argue that the visibility of the bird is a handicap for him while searching for fish or, on the contrary, might make him less visible for fish etc.

Reflective learning

Apart from a focus on the key competences, competence based learning also requires 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.

Reflective questions might be:

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

Personal learning

In the competence oriented theories learning is conceived as a process of constructing one’s own personal knowledge and competences. Information, knowledge and strategies only become meaningful for a person if they become an integral part of (or: if they are integrated in) 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.

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





Implications for trainers

From learning to act towards acting to learn, that is basically the core of the concept of competence oriented education. As indicated above, this implies that the learning process of the students/learners will be to a large extent experiential, explorative, constructive, interactive and reflective.

Some say the trainer has a different role than he/she used to have in a more traditional way of training/teaching; others say that the role may be similar but the order for taking the different roles has changed. We prefer the latter approach. All roles of teachers are included, but the emphasis on role and the sequence has changed.

Traditional teaching approach	Competence oriented approach
Identifies and formulates goals in terms of knowledge skills and attitudes	Formulates goals in terms of competences
Selects content	Organises a work/learning setting
Presents the content	Creates a rich learning environment that includes dilemmas or options
Explains the content	Provides realistic professional tasks and assignments
Provides learning tasks/ assignments	Provides inputs, organises dialogues
Gives feedback	Organises reflection, provides inputs
Assesses	Assesses demonstrations of competence
Provides feedback and suggestions for further	Provides feedback and suggests further action

The implications of competence oriented learning may be further elaborated according to the steps mentioned in the right column of the scheme above.

Formulates goals in terms of competences

The curriculum outlines presented contain these competences. They are formulated in the professional profiles included in this manual. The skills, attitudes and knowledge components are specified and so are the contexts in which the interpreters will have to perform.

Organises a work/learning setting

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

Creates a rich learning environment that includes dilemmas or options

Creating the environment is not enough for competence oriented learning. In order to accomplish that, it is necessary for the learner to experience the urge to solve questions, to get to know things, to be accurate etc. That is why, on top of a realistic setting, there is also a need for relevant and urgent professional opportunities, challenges, dilemmas, choices, expectations etc.

Provides realistic professional tasks and assignments

In order to make the learner (in the field of heritage interpretation) start the learning process, it is important that he/she knows what is expected, what the purpose is, what needs to be achieved etc. Tasks and assignments serve this purpose. They motivate the learner to give course to the actions and to perform in a task oriented way, trying to achieve the intended outcomes/products/services. The tasks and assignments given should be key tasks a heritage interpreter at his/ her level should be able to perform (for example: organising an exhibition, addressing a group, convincing your manager, creating a flyer, setting up a trail etc.).



Provides inputs, organises dialogues

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

If course participants/students are supposed to organise a guided tour through a palace such as Eltham Palace in London, they will wonder what might be the theme of such a guided tour, what would be relevant to an audience, how such an experience could be organised for visitors. It might be a tour either about the rich and famous or about the aesthetics of the building's architecture. And if these are themes, what would be the message behind the experience? Would it be a moral issue about wealth and poverty or a plea for beauty and conservation of the site? While having such discussions the students will familiarise themselves with the interpretative philosophy and its practical implications.

Organises reflection, provides inputs

After the process of active learning and working on the tasks/ assignments given, the process will require reflection. These reflections may refer to:

- the tasks/assignment (How did you interpret the task?)
- the actions taken (What did you actually do to fulfil the task?)
- the effects of the actions (What were the result of you actions?)

- the impact of the effects (How far did the effects stretch in terms of time and number of people involved?)
- the (group) process (How did you co-operate with others and others with you?)
- the learning outcomes (What have you learned from this?)
- the learning strategies (What could you do to improve your future learning?)
- the transfer to the own work situation (How can you apply in your work what you have learned?)
- future actions (What will be your next moves to promote your own professional development?)

Assesses demonstrations of competence

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

To demonstrate their competence in writing in an interpretative way, students are asked to write a panel to inform visitors about an excavation. It concerns an excavation of the Barbara Baths in the German town of Trier. The panel must be informative, it must be relevant to the visitors and should have an underlying theme or issue. The assessment will not only serve to assess the competences of the students; it will also further support their learning. They will see what themes others may have chosen and how they have turned those into text and visuals. They will be confronted with various themes (gender issues in the Roman Empire; hygiene as part of civilisation; social issues of people visiting the baths and those working there in ancient times etc.)



Provides feedback and suggests further action

Competence oriented trainers see the learning process as an ongoing process not necessarily limited to the course duration, so competence oriented learning will always include suggestions for further development of competence and how to achieve this.

A competence oriented course is meant to add to the level of competence of its attendants and to the further development of these competences. That is why such courses need to include elements of action planning aiming at what to do with the learning outcomes once participants are back in their own work contexts. Trainers may ask participants to write such an action plan, or to develop alternative scenarios of how their work might change in the future. By doing so, they are challenged to transfer what they have learned to their current and future work practices.

So far we have approached the methodology of a competence oriented curriculum basically as the methodology of an initial training course for heritage interpreters. However, the reality is that often the participants in programmes for heritage interpreters are, to some extent, already experienced in the field of heritage interpretation. So the approach will need to acknowledge the background and the already acquired competences of participants. In the field of professional development of any professional group we see trends towards lifelong learning oriented approaches. The model of attending an initial course and live your professional life happily ever after has long been left behind.

This is another reason to reflect upon our methodology and look at the implications of these changed views on professional development on our methodology.

Towards lifelong professional learning among heritage interpreters

Throughout recent history the ways in which professionals have been trained have evolved: from being more offer centred towards being more demand driven, from being expert centred to being learner centred, from being individually oriented towards team or organisation centred, from being incidental towards more permanent. The following section illustrates these trends.

Initial training for lifelong work

This is the traditional model in which people were trained for a job and then only further developed by experience.

In-service training courses

On the job professional development was traditionally organized as in-service courses aimed at updating knowledge and skills in people's field of work or in related subject matter/ disciplines. Courses usually aimed at updating the knowledge of individual people.

Team based in-service education

After a long tradition of training offered by universities and colleges and focused on individuals, the concept of team based in-service was explored. Learning was not only a matter of being trained, it was a matter of committing oneself, both as an individual and as a team. Team based learning became a common concept of professional development. The assumption was that by being trained as a team, people would be mutually supportive in applying what they had learned in their regular work.

From in-service education to in-service learning

Team based in-service was the dominant approach for



some years but then an awareness of the necessity to learn at the workplace, using internal resources, arose. After all, transfer of what had been learned to daily practice remained insufficient. In-service educators re-defined their positions and assumed the role of facilitators of learning. Gradually the emphasis shifted to more co-operative forms of in-service learning. Professional learning communities, study circles, networks and partnerships became frequently used terms.

Contextual professional learning

Whereas in-service learning can still be considered an activity that alternates with working – one learns and then one applies – the idea behind knowledge productivity is that change and innovation are not interruptions of stable periods in which practice doesn't significantly change. On the contrary, change and innovation are the 'normal' situation. The challenge became to optimize the work environment as a learning environment for all parties involved. Learning and working began to converge.

Learning beyond organizations

Learning so far was treated as something that happens basically within organizations or is organised by them. The reality is that much learning occurs between organisations, or between persons in a variety of contexts and interconnections. Professionals work in their organisations - in our case museums, parks or other heritage sites. At the same time, however, they take part in professional networks of various kinds. A few examples of networks that may extend beyond one's own organisation:

- Communities of practice
- Alumni networks, associations, networks, links, organisational partnerships
- E-learning environments
- Peers, professional friends, family
- Web logs, Skype, Facebook, LinkedIn, Twitter, etc.

Three prototypes of interpreters' curricula

Based on the views outlined above, the InHerit team has developed three prototypes of curricula for heritage interpreters. These three curricula are devoted to heritage interpreters in three distinct positions:

- The personal interpreter/ guide
- The copywriter/author of written or other information material including display, leaflets, multimedia etc.
- The site planner/site manager, the one strategically responsible for a heritage site.

From the curriculum outlines we developed for each of these positions, we have derived elements and composed a course out of them. The aim was to pilot this course among people actively involved in heritage interpretation in order to try out the competence oriented approach we chose and elaborated.



Villa Domiziano (IT)

Key features of the curriculum prototypes

To a large extent the programmes developed address experienced people. This increases the need to include ways



of doing entry assessments, or set up acknowledgement of prior learning and experience procedures, such as portfolio, reference system, etc.. Participants need to go through an intake process in which they are invited to demonstrate their previously acquired competences. The actual programme offered has to be responsive to their actual learning needs.

The changed approach to professional learning as perceived over the last decades has other implications as well. One should realise that learning does not only concern the individual, it also may involve teams/organisations and the methodology of the courses given should also include these wider professional contexts in the learning process. Learning is not confined to the organisation in which one works, it stretches much further. A lot of learning is done among organisations, or in other bodies, or associations of professionals. Learning is not only happening in or beyond organisations, it increasingly has a cyber-component. It includes the virtual world of Internet, of social media and all the apps and devices connected to it. For trainers this implies that a course should include:

- procedures of entry assessment and validation of prior knowledge and experience;
- furthermore, the programme needs to offer realistic contexts including the wider organisational contexts in which people work;
- the realistic setting must stretch even further by also including Internet and social media, like the professional work setting does.

Eventually the programme must include ways to make the learning process sustainable in the sense that it not only prepares for, but also allows to continue developing on the chosen paths. The Inherit project approach is a further elaboration of an approach developed within an adult lifelong learning project (GINCO). At this point, with the emphasis on sustainability, we close the circle and turn the professional development of heritage interpreters into a process of lifelong professional development.

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'. The CEDEFOP 2009 guidelines state that validation is "the confirmation by a competent body that learning outcomes (knowledge, skills and/or competences) acquired by an individual in a formal, non-formal or informal setting have been assessed against predefined criteria and are compliant with the requirements of a validation standard. Validation typically leads to certification".⁵⁷

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 recognise this learning. This is a priority in the EU's education and training actions. "The 2012 Council Recommendation on validation of non-formal and informal learning seeks to promote a more systematic approach to validation to increase the visibility and value of learning taking place outside formal education and training systems. A key objective is for EU member states to work together towards national arrangements for validation by 2018. This should make it possible for all citizens to have their non-formal or informal learning identified and documented, and if they so wish, assessed and certified"⁵⁸

Therefore the European Commission invests a lot in introducing a culture of validation of learning outcomes in Europe. "Learning outcomes are statements of what a learner is expected to know, understand and/or be able to demonstrate after the completion of a process of learning"

⁵⁷ CEDEFOP Glossary of Key Terms, <http://www.cedefop.europa.eu/>

⁵⁸ European Guidelines for validating non-formal and informal learning, CEDEFOP 2014



(ECTS - EU, 2004). Learning outcomes should provide comparable information about what learners have actually learned. They are a counter-concept of input-based or time-based systems such as ECTS.

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. A dialogue between the course organiser or trainer and the participant should result in a learning agreement containing the envisaged learning outcomes tailored to the participant.

Documentation

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

Assessment

Assessment is a referencing process, the process of comparing 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 and 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.

Assessment can be based on external evaluation, self-assessment, peer assessment or a combination of these processes. It can be a combination of written tests, practical exercises, demonstrations, interviews ... The credibility of the assessment is crucial: "The extent to which validation process outcomes can be transferred and exchanged very much depends on the extent to which the resulting document, portfolio, certificate or qualification is trusted by external parties and stakeholders."⁵⁹

Certification

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

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



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).⁶⁰ One could also link up with the European System of Credits for Vocational Education and Training – ECVET.

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

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

Negotiations between HI in-service training course providers and universities or university colleges should help establish integration and recognition in the NQF system. In this respect new approaches to credits, study points, partial certificates in the frame of a post graduate or a trajectory assessment system by a university college or even an ‘assessment centre’ could be pioneered.

LEVEL5

In the InHerit project pilot courses, the trainers also introduced a validation system called LEVEL5. The LEVEL5 developers assume that learning outcomes can be displayed by means of three components or dimensions: the knowledge component, the activity component 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.⁶¹

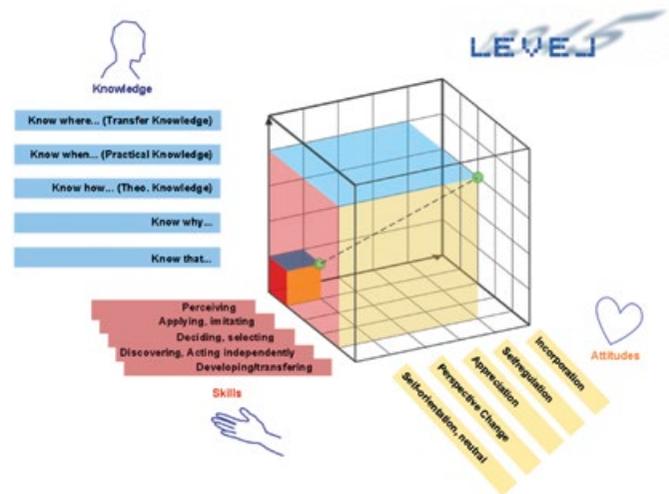


Fig. 1: The LEVEL5 cube

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



Fig. 2: LEVEL5 cyclic validation approach

1. Learning project description: the learning project is described in a predefined template.
2. Selecting topics: learning topics are chosen from the competence profile or the course objectives. Topics can be further explored at an in-depth level and can be tailored specifically for an individual learner.
3. Establishing an individualised reference system, developed on the basis of the three dimensions (cognitive, activity related and affective) for the five competence levels.
4. Assessment
Assessment concepts (self-, external and mixed assessment) and methods should be chosen according to the context and objectives.

5. Rating/documenting/visualising (online documentation system). After the assessment, the values from the competence levels 1 to 5 are recorded in the reference system and displayed as a LEVEL5 cube. The ratings are explained and documented and, if applicable, documented in a certificate. Results of learners and project characteristics are recorded internally.

Learners' certificates can be automatically generated (as editable PDF). Considering the large variety of training offers, contexts, target groups and activities in the adult education sector, one cannot expect a 'perfect' validation system in informal learning contexts to be developed from a ready-made validation system. Therefore, LEVEL5 is based on action theory principles and works with a rather



cyclic procedure: the user always has the opportunity to modify some elements of the validation system during the assessment and evaluation processes.

On the InHerit project website three LEVEL5 reference systems are presented in terms of level descriptors. For the 'interpretive guide' the indicators for the three dimensions are also listed. Based on these descriptions and indicators evaluation instruments can be created and lead to the assessment of the learner.

Two pilot courses

The approach as outlined in this chapter has been elaborated in two pilot programmes, each being an InHerit 3 days introductory course.

The course is conceived to serve a mix of roles/tasks and to introduce learners to the approach of heritage interpretation. It targets heritage staff and adult educators already working in the field of non-formal and informal adult learning at monuments, sites, natural protected areas and museums, who are, however, not yet familiar with the approach and methodology of heritage interpretation.



Ninfa Garden (IT)

The main goal of the course is to help participants develop the necessary competences for successfully introducing the concept of heritage interpretation in their own working context. This implies general knowledge about heritage interpretation and its principles, awareness raising about the benefits of interpretation in an heritage context, development of basic competences related to interpretation techniques and transfer competences.

The first Pilot was implemented in June 2015 in London. The heritage site selected for this purpose was Eltham palace, a large house within the Royal Borough of Greenwich, South East London, England. It is an unoccupied royal residence and owned by the Crown Estate. In 1995 its management was handed over to English Heritage which restored the building in 1999 and opened it to the public.[1] The internally Art Deco house is said to be a "masterpiece of modern design". The focus of this pilot course was on cultural heritage.

The second InHerit pilot course took place in Italy in November 2015 and was hosted and organised by the Istituto Pangea, in cooperation with the InHerit team. The courses headquarters and meeting rooms were in the Oasi Di Kufra hotel in Sabaudia, a small town in the Circeo National Park, about 100 km. south of Rome. The group explored the area during several excursions highlighting a beautiful garden, a Roman villa, the Circeo Park and its visitors' centre. As compared to the London example, his second pilot emphasized natural heritage rather than cultural heritage.

Through experiencing the sites, examples of interpretation, presentations, discussions and group work, the participants developed their interpretation competences and the course organisers tested the competence oriented InHerit training approach.

Both pilot courses revealed the tremendous power of the course concept to evoke an interest in heritage interpretation and to build the competences that come with it, either as a guide, a copywriter or a site planner. Both pilots showed that the courses had provided the participants with a most enjoyable



and useful learning experience. The level of appreciation for the course was really high. The training courses were highly valued and all inputs were seen as relevant. Still, the participants had a few comments. Basically they felt that they had been introduced in too many aspects at the time and some of them felt that time often was insufficient to give feedback to all participants. Although in the second pilot things were planned differently in order to prevent this, the problem was not completely solved yet. In evaluations of both trainers and participants it became obvious that little use had been made of the entry assessment/intake assessment data. Participants felt that more reflection time might be an improvement. So, apart from the overall high appreciation of the course, there may be room for improvement by paying more attention to the previous knowledge and experience of the learners and by more focusing on the individually needed competence acquisition. This requires some more attention to the intake, monitoring and assessment of participants' competences. Participants wanted more room for critical mutual feedback and for feedback from trainers upon their performance.

The overall impression of both pilots led us to conclude that in implementing the competence oriented approach of the InHerit project a few aspects need extra attention. The first one is the assessment of the prior knowledge and experience of participants in terms of competences. Find some time to make participants articulate their competence acquisition needs. Secondly: besides training, also provide some coaching like support to help learners develop competences. This stimulates the development of competences and, what is more, the awareness of this progress.

Therefore: see to it that the competences participants have to develop are programmed twice, so they will be able to experience progress in their development. Limit the initial instruction to a minimum so that participants will engage in hands on experience almost from scratch. After the experience the learners may be more aware of the relevance of the expert inputs once they appear. The expert will see that many participants do not need an exhaustive instruction before engaging in a valuable learning experience. Interesting

in this respect is the quite detailed analysis participants made of each other's performances during the guided tours. In fact the participants experienced this feedback as sometimes more to the point and more critical than the overall praise of the trainers.

The assessment and validation of learning outcomes require some extra measures. Given the comments made, we must realise that we cannot change things by adding things, unless we will at the same time reduce the number of topics we wish to include. In both pilot courses the participants emphasised the need to engage in reflection and share the ideas generated by it. Still a course needs to provide participants with the tools and formats to validate their competences. This process of validating the learning outcomes and forthcoming competences may best be supported by using competence reference systems as described above. Furthermore, this process of validation does require evidence of the acquired competences. This process of validation was made part of the InHerit project. To structure this process we used the validation system based on the LEVEL5 approach developed in various EU based projects (Provide, Vilma, Promote, Impact ...).



A timetable for Ötzi (Ötzi museum - Bolzano)

The pilots have supported the idea that courses like this add to the professional development of heritage interpreters. The outlines of the developed curricula seem valid, now

that the pilots have been completed. The competence oriented approach of the curriculum outlines was not yet fully turned into practice in either pilot, but the responses of the participants showed they would appreciate it. In this way we can see both pilots as highly supportive for the InHerit ideas, approach and programmes.

Epilogue

This chapter sketched the ways in which heritage interpreters may be trained. It provided an overview of the key features of competence oriented teaching and learning and the implications this has for the training of heritage interpreters. Not only the implication for its teaching methods were mentioned, also the implications for the ways in which professional learning of heritage interpreters may stretch beyond initial training and be turned in processes of lifelong professional learning. We mentioned the fact that three prototypes of training curricula for heritage interpreters were developed. These curricula are not included in this publication but they may be found and downloaded from the InHerit website: <http://www.interpretingheritage.eu>

The chapter was completed with an impression of the two pilot courses given in England and in Italy and some of the lessons learned while piloting the InHerit approach. We can conclude that in implementing the approach it is important to devote specific attention to attuning the course to the prior experiences and learning needs of the participants, and also to guidance and monitoring which makes the learners aware of their progress in developing their competence. Last but not least a competence approach must include ways to validate the competences either acquired before attending the course, and/or while taking part in it.

InHerit project partners

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

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

Please visit www.interpretingheritage.eu



Project co-ordinator

Alden Biesen



Vlaanderen
verbeelding werkt



ISBN : 9789081794145