

# IE Training policy

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## Background

### How did IE's training programme evolve?

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

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

Since 2017 more certification courses have been developed, along with some modules that aim on more specific facets of heritage interpretation.

More specifically, besides the original course for interpretive guides, IE's training programme currently includes a certification course for Interpretive Writers and another one for Interpretive Planners. These courses have been tested in more than six European countries by different IE certified trainers. Furthermore, the course for Certified Interpretive Planners has also been used as the basis for a course on interpretive planning for World Heritage Sites run in collaboration with UNESCO's Regional Bureau for Science and Culture in Europe.

Finally, along with the initial module for Interpretive Hosting which has been implemented several times before reaching its current status, two modules, one for Live Interpretation and another for Interpreters working with Children are in their pilot phase, whilst a fourth one, dealing with Gastro Interpretation is in its developmental stage.

## Drivers behind the development of the training programme

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

1. According to its Constitution, IE shall conduct training activities;
2. A membership representative of the European community is critical for IE.

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

Based on its previous (2016-2020) as well as the interim (2022-2025) strategy, IE's reasoned that economic independence shall be secured through income from membership fees. An exclusive IE training programme with an increasing number of IE-certified trainers had been and still is seen as one of the most critical ways of achieving this goal. The principle is IE gives trainers as much freedom as possible in running IE courses in return for participants taking out IE membership as a mandatory condition to join any course in the IE training programme. Since 2016 more than 1500 new members joined IE through its training programme.

## IE training attributes

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

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

At the launch of IE training programme IE designated training team laid several attributes of the IE training programme. However, the agreed attributes are by no means a finite subject and discussion is ongoing as IE's training programme develops. The agreed principles are the following:

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

## **To foster the IE network for quality interpretation**

IE's mission is to empower all who inspire meaningful connections with Europe's natural and cultural heritage to shape our common future. Its two key strategic goals are to grow a membership that supports, and is supported by, the association, and to anchor heritage interpretation at European and national levels.

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

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

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

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

IE courses' methods reflect the values Interpret Europe stands for. Thus, they go beyond teaching techniques and frame the heritage interpretation to wider context. Value-based heritage interpretation as the IE leading principle puts emphasis on reflecting values, participatory approach and sustainability. So do the activities of IE courses.

Trainers strive for promoting sustainability not only by their own examples, but also within the organizational aspects of each course like accessibility by public transport, low carbon footprint venue, choice of local food etc.

## **To have transparent and clear certification requirements**

A pre-determined set of criteria must be met in all IE certification courses for any participant to be certified. These criteria, along with details about the certification process, can be found in the training and certification plans produced for each course. They follow the same principles across all the IE courses and are written in a way to make the certification process as clear as possible. Training coordinator(s) are responsible for changing the certification requirements upon consultation with the training team.

## To follow the cooperative approach

To ensure that all IE training activities (modules and certification courses) have a maximum learning effect, they promote the building of safe environment based on trustful relationships between the participants, as well as between the participants and the trainer(s). In such environment exercises and discussions are based on individual progress building process rather than a good/bad, or right/wrong performance. This safe and collaborative environment is achieved through:

- Interactive activities;
- Exercises where participants have to work as pairs or teams;
- Peer evaluation;
- Inclusive discussions;
- Emphasising the trainer's role as a facilitator during the whole process.

Thus, even after the module or course ends, participants often keep in touch with their trainers (as well as the rest of the IE network) through multiple events, training or not, organised by the association, as well as social media, newsletters, etc.

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

## To offer challenges

The activities in an IE training event are designed to build on the pre-existing knowledge and the personal and professional experience the participants have. On the other hand, participants also need get slightly out of their comfort zone, since they are asked to develop and share different forms of interpretive outputs and to receive peer evaluation. This way, trainees face a challenge, but in an environment that feels safe, thanks to the group dynamics and the trainer's role as a mentor.

Being introduced to heritage interpretation and new approaches towards their clients, trainees are encouraged to find ways to re-think their usual attitudes when presenting heritage to the public. The courses are finished with homeworks, where trainees demonstrate ability to find their own solutions on how best to use heritage interpretation in their profession.

## To offer variety

IE courses and modules include a multitude of different training techniques, such as field and class-based exercises, work in pairs, group or individual work, facilitated discussions, study visits, participants presenting their work, peer assessment based on specific criteria and, in the case of certification courses, practical exams, written tests and homework tasks that may involve intense tutoring. Similarly, different aspects of each interpretive field are explored during the trainings.

## **To be supportive and inspiring**

IE courses strive to inspire its participants with value-based heritage interpretation. Therefore, all activities mirror and promote attitudes focused on participation, shared European values and sustainability, that we also expect trainees to adopt and disseminate.

Participants are encouraged to come with their own case studies to enrich the training while receiving support for their own projects. With acknowledging participant's talents and encouraging them to develop their skills, trainers offer personalised support also through the homework review.

Since the main source of inspiration comes from the trainers, and this is why in all training events they must be able to demonstrate at least one good example of the interpretive technique they are teaching, such as an interpretive talk or an interpretive panel.

## **To remain fresh and relevant**

IE training plans are not written in stone. The whole network of IE trainers tests them with every course or module they run and they can report their own findings about them to the Training Team. At the same time, the trainers are offered multiple opportunities to interact within IE's network and propose new ideas or solutions that could eventually be introduced to one of the training events. In such way the IE trainings shall reflect development in the field of heritage interpretation.

The network of trainers, consisting of all certified interpretive trainers with an active license, can bring forward suggestions for updating activities in the courses and modules. The final responsibility for such changes lies with the Training Coordinator and the development team of each training event, if such team exists to fine-tune the training plans and keep the trainers informed about any updating (see also 'Development of new courses and modules').

## **To be rewarding, meaningful, well-prepared**

All trainers follow a specific, tested and approved training and certification plan of a respective course or module they are running, and need to carefully follow the directions given to it. Furthermore, IE trainers must submit the outline (daily schedule) of their planned training event to the Training Coordinator, one month before the event begins.

IE certification courses are devised for professionals with prior experience on the specific technique of each course (guiding, writing, planning, etc.) who wish to improve their interpretive skills. Such profiles are considered both during development and execution of the courses. The trainers should use participants' prior knowledge and experiences as a basis to build further development of their skills and capacities.

In addition, all IE courses and modules should consist of activities with a clear purpose of development of pre-defined competencies. Each activity thus has clear aims and the courses are not just a series of entertaining games and presentations. To achieve this, the training and certification plan includes all information a trainer might need in order to run the course. It describes detailed directions about the purpose, participant requirements, daily schedule, activities, material needed, time/exercise, etc. to keep a homogenous, common way of running a course.

## **To open up professional opportunities**

The training programme is part of IE's mission "to empower all who inspire meaningful connections with Europe's natural and cultural heritage to shape our common future", as it offers interpreters the opportunity to improve their professional skills and expand their competences in all different aspects of heritage interpretation. Therefore, this must be the purpose behind all IE training events, and serve as the compass when creating each training plan and one criterion to evaluate the success of the curriculum.

IE supports all its trainers in being good and reliable partners for institutions who are interested in organising IE training events.

## How is IE's training programme organised?

### Training coordinator(s)

Training coordinator(s) is appointed by the board of directors to oversee the Interpret Europe training programme. Training coordinator (TC) checks quality of the training programme by approving individual trainings, issuing IE certificates. TC organizes course development and refinement, approves new Training and Certification Plans, as well as updates to the training policy. TC is responsible for the trainers' network and creates opportunity for trainer's active involvement in the IE training programme and IE trainers' network.

### Training team

The IE Training Team was established by Training Coordinators to:

- To support Training Coordinator(s) in development and promotion of IE's training programme, with special attention to the quality of courses, modules and trainers;
- To make all necessary efforts so that IE courses and modules always remain fresh, relevant and contemporary;
- To help organise a network of IE trainers and to advise them in organising the trainings;

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

### How is IE's training programme communicated?

Certified IE trainers are responsible for securing training opportunities, ideally with organising partners. In addition to this policy document, IE has produced three papers ('Communicating heritage interpretation to non-IE members' and 'Communicating Interpret Europe to non-IE members' and a collection of Frequently Asked Questions -FAQ,) which provide trainers with guidelines and detailed advice on how to do this, thus ensuring that each training event meets IE training requirements.

One specific requirement must be clear for all participants and with the organising partner, while communicating a training event:

- The IE training programme is open only for IE members. Consequently, course participants need to be registered as IE members and to pay the full annual membership fee before the beginning of the course. In case of special circumstances, a participant can still apply for membership and pay the membership fee until the end of the first day of the course they attend.

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

## How are the trainers for particular courses selected?

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

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

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

## Running and developing the programme

### The organisational and training process

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

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

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

Individual IE members can attend the course or module of their choice after completing the application procedure set by the IE trainer.

The IE trainer issues certificates of participation some participants might need for their employer or personal reference. Certificate of participation proves that a participant took part in the training course, it does not certify completion of a course.

Participants who joined a certification course (e.g. CIG) and who successfully completed all the tasks described in the appropriate course training and certification plan, receive an official IE certificate signed by the Training Coordinator and the trainer. This is issued upon trainer's announcement confirming the participant delivered all the tasks necessary to achieve certification. Apart from the certificate, certified participants receive a digital logo showing their certified status and the year it was achieved. All certified participants can use the digital logo. This is renewed annually for as long as certified trainees are active IE members and of good standing.

### **Training courses and modules**

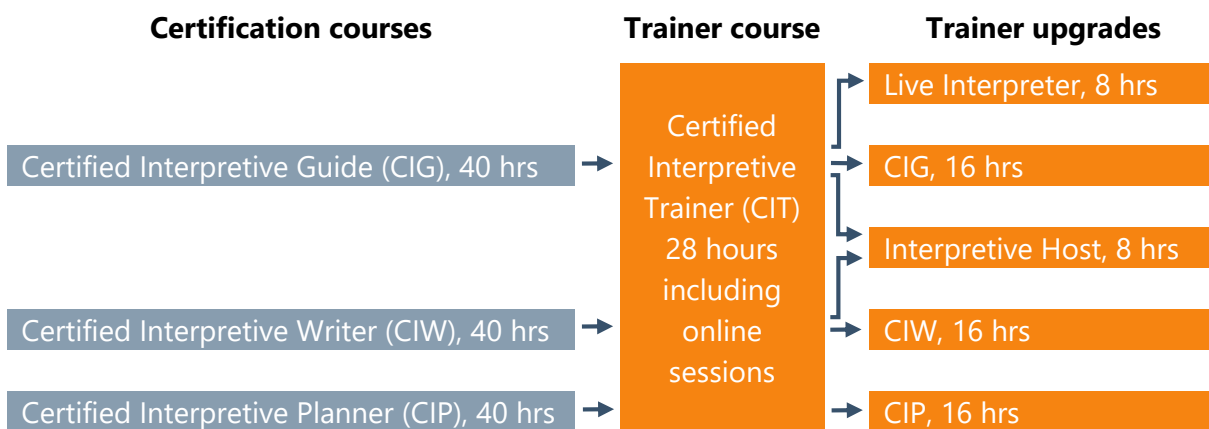
The training and certification plan for each certification course or the training plan for each training module specifies the volume and nature of training material to be prepared and used by the trainer. All IE training material is prepared by those who develop the event. The material is then tested in pilot events, approved by the Training Coordinator(s) and confirmed by the Board of Directors.

IE strongly encourages the translation of training material in different languages to facilitate the dissemination of IE training events Europe-wide. All training material must comply with the quality criteria established by IE for its training programme. Training and certification plans, as well as training plans and training material are continuously assessed and can be amended, but not more frequently than once a year.

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

1. Certification course (40 hours) including all requirements and successful certification;
2. The trainer course (28 hours) including all requirements and successful certification;
3. Respective trainer upgrade (16 hours).

To run a module, a trainer must fulfil steps 1 and 2 above and attend the particular 8-hour module upgrade.

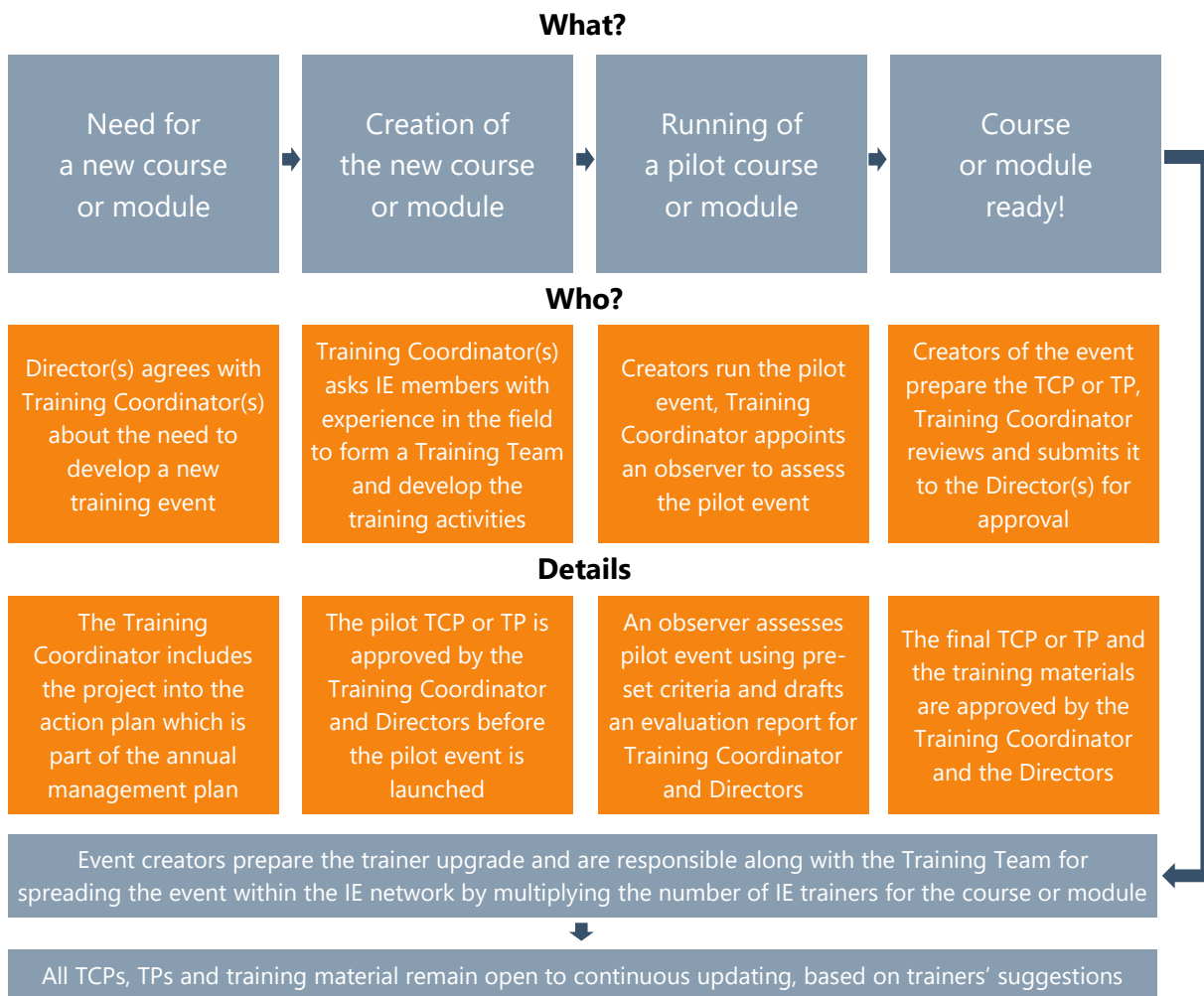


### Developing new courses or modules

All new courses and modules in IE's training programme are developed by the Training Team consisting of IE members with relevant previous interpretation and training experience, under the guidance of the Training Coordinator, and after confirmation by the Management (Board of Directors). Different training team members might be assigned to different sub-themes that develop respective courses and modules.

The core document used to devise and deliver each training module is a training plan (TP), while its counterpart for the certification courses (CIG, CIW, CIP, CIT) is a training and certification plan (TCP) which is drafted by the Training Team together with the Training Coordinator and confirmed by the Director/s.

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



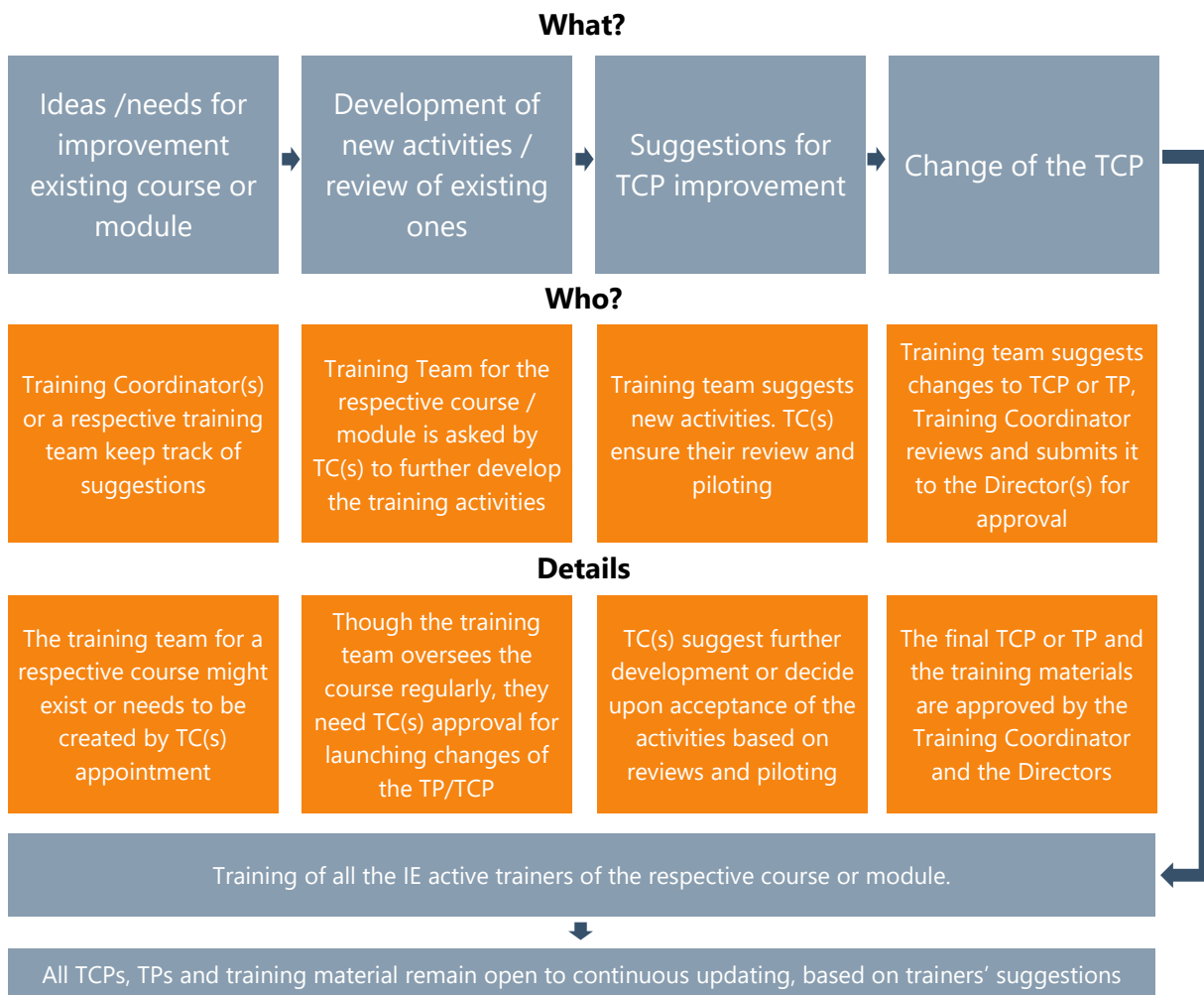
**Developing existing courses or modules**

Interpret Europe continuously oversees quality of the courses and modules. This is done through:

- Feedback from participants they fill after taking part in the training.
- Feedback from the trainers during regular trainers’ meetings.
- On-site reviews through peer-coaching.
- Course-specific reviews conducted e.g. through research, evaluation by external experts etc.

New ideas for a course / module improvement also come from the community of trainers.

Call for improvement of the existing courses or modules may come either from the Training Coordinators, the Training Team, IE Board of Directors or the trainers. The first step in a course or module further development is to set up transparent process that ensures that the decisions are based on experience gathered within IE and from running the previous courses while incorporating new ideas from the field of heritage interpretation.



## Training trainers

### How to become an IE trainer

Every year, IE organises and runs train-the-trainer courses. In order to sustain exchange within the IE trainer network these courses are held in English while the fees are aligned to the GDP of the trainees' countries of residence. To join an IE trainers' course, participants must be certified in at least one other IE certification course, have (ideally active) experience in the field they want to become trainers and have previous experience in adult training.

To teach a certification course, a trainer must hold the certificate of that particular course. This ensures that all trainers have experienced the sessions, exercises and requirements as participants in their own right before they use them to train others. It also ensures that trainers can get into an effective exchange about courses with their IE trainer colleagues. The same applies to modules although they don't include a certificate.

Participants in all IE courses and modules can have different backgrounds and do not necessarily need to have in-depth knowledge about heritage interpretation when they join an IE training event. However, trainer candidates need to prove that they have training experience as well as experience in the field they will be asked to deliver training courses or modules.

Certified Interpretive Trainers (CIT) receive general Interpret Europe trainers' training, which qualifies them to enter so called trainer upgrade focused on their respective course or module. Without having both qualifications trainers cannot run an Interpret Europe module or training. However, they might be asked by a certified trainer to perform the role of an assistant trainer.

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

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

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

IE Certified Interpretive Trainers receive their certificate, signed by the Director and the Training Coordinator and a digital logo they can use as long as they are active trainers.

## Conditions to keep the trainer license

Once receiving their CIT certificate, IE trainers also receive a trainer license which allows them to provide Interpret Europe training in the respective calendar year. Trainer license does not have form of a certificate, it is demonstrated by being kept in IE database of active trainers, which entitles trainers to: a) being published in the online list of IE trainers and b) receiving trainer's tag(s) for the respective year.

In order to keep quality of IE trainings, the trainers with active license need to:

- 1) Run IE courses either as a trainer or an assistant, at least 1 course in 2 calendar years.
- 2) Contribute to IE training programme and/or IE trainers' community in some of the areas:
  - a) Trainings
  - b) IE training programme development
  - c) Expertise

For activities in these areas trainers receive points. In order to keep their licence, they need to collect at least 20 points within a 2-year period. If they fail to do so, they will be asked for financial contribution to the training programme. Financial contribution is considered equal to keeping the activity status.

The following table shows what trainers need to do in order to keep their licence and what they need to do to acquire it back if they lost the trainer license:

<b>Two conditions to keep trainer license:</b>	<b>1) Run at least one IE course as a trainer or an assistant in 2 years</b>	<b>2) Keep the activity status (20 points / 2 years)</b>
License lost: 1–2 calendar years of not meeting the obligation	Assisting another trainer (on own cost).	Contribute to IE training program financially.
License lost: more than calendar 2 years from meeting the obligation	Taking part in CIT again or trainer status suspended.	Trainer status suspended if meeting the activity status discontinued.

Trainers FAQ details how to keep the activity status.

Trainers cannot promote themselves or act as IE trainers if they have no valid trainer license. Furthermore, an IE trainer can lose their status if the Board of Directors decide trainers acted against IE's mission or purpose, according to §2 of its Constitution, or if feedback forms from training events reveal considerable deficits.

## Assistant trainers

Assistant trainer is not a special status. Trainers may ad hoc ask other qualified IE members to become assistant trainers during their courses.

Certified graduate of each training can play the role of an assistant trainer in the course he/she was certified for if the number of participants does not exceed the maximum number of participants per trainer listed in respective TCP.

CIT graduate with an active trainer's licence can play the role of an assistant trainer if the number of the participants of the training does not exceed maximum number of participants per trainer listed in the respective TCP by 150%. Of course, this assistant trainer also needs to be graduate of the respective course.

Example: Maximum number of participants for the CIG course is 16 per certified trainer.

Number of course participants	Less than 16	17 – 24	25 – 32	32 – 40
Minimum of certified trainers	1	1	2	2
Assistant trainer – certified graduate of the CIG course	1	x	1	x
Assistant trainer – graduate of the CIG course + CIT graduate		1		1

## IE trainer trainers

IE trainer-trainers need to be experienced IE trainers with wide understanding of theory in the fields of education and interpretation. They are proposed by the Training Coordinator and must be appointed by the Board of Directors.