

Competences for the professional field of heritage interpretation - mapping competences according to EQF levels -

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A Introduction

Many thousands of people are involved in the field of heritage interpretation in Europe, i.e. in the field of facilitating informal and non-formal learning to visitors at natural and cultural heritage sites, monuments, museums, zoos and gardens. But probably only a small fraction has ever heard about the discipline of 'heritage interpretation'. And only a limited number of people working in the heritage field ever had training in communication skills targeting non-captive audiences.

In many cases guides or curators started with a research oriented academic background in one of the heritage related disciplines such as biology, archaeology etc. Many entering this field of non-formal education are therefore acquiring such competences through learning by doing, asking more experienced colleagues and trial-and-error. In-service training in these competences to facilitate non-formal learning in heritage environments is often not easily available, and it is not easy to gain an overview of which competences are important.

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

This reference framework is mainly intended for those who are involved in developing training and higher education programmes in heritage interpretation which are part of continuous professional development (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.

Considering that time and budget may be limited, a range of competences at different levels of proficiency is needed in order to plan and deliver heritage interpretation in various contexts.

The InHerit competence matrix in chapter C 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.

The following section introduces some key concepts which are important to understand the logic of this matrix.

1 What is a 'competence'

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 definition¹, '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

¹ 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 (see Appendix: Definitions and explanations). In this document 'competence' is used as a technical term as defined above.

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:

1. First the range of real world contexts for the entire field of heritage interpretation is briefly outlined (section B The professional field of heritage interpretation).
2. Then the competences that play a role in this professional field are described within the framework of EQF levels (section C Competence areas in the field of heritage interpretation).
3. KSA 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 which a qualification and / or a training programme address.

Trainings and higher education programmes usually target a specific range of real world contexts (depending on which groups of learners are targeted). As a first step of curriculum development it is therefore recommended to select relevant generic competences from this matrix and then reformulate them in more specific terms.

2 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.²

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).

Additional generic competence areas in the field of heritage interpretation:

- Evaluation,
- Promotion & advocacy,
- Management,
- Training.

In practice an individual does not need to be competent in all these areas; which competence areas are relevant at what level of proficiency in order to be able to perform a range of tasks in a particular real world context depends on the specific position an interpreter holds.

3 Linking competences with the European Qualifications Framework (EQF)

The EQF outlines an overarching framework to be set up in Europe to facilitate comparison of qualifications and qualifications levels in order to promote geographical and labour market mobility as well as lifelong learning³. The core of the EQF is 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',

² 'Core competence area' refers to those competences that involve knowledge, skills and attitudes that are rather specifically tailored towards the field of 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.

³ European Commission (2008): Explaining the European Qualifications Framework for Lifelong Learning

'skills' and 'responsibility and autonomy' (see <http://ec.europa.eu/ploteus/content/descriptors-page>).⁴

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

4 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 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 consultant specialised in media interpretation working for different 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, there are also others from lower levels 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

4 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 includes also 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.

above example.

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.

EQF level	Core competence areas			
	Research	Planning	Personal delivery	Media delivery
3			Responding To make visitors of a place feel welcome.	
4	Phenomena To identify compelling phenomena that can be used for first hand visitor experience... Supporting infrastructure To check the site for... visitor accessibility. Impact assessment To identify... threats to the heritage assets... of bringing visitors.	Interpretation principles To follow basic interpretation principles and philosophy... Follow guidance/ instructions To integrate briefing and advice from a mentor or supervisor while preparing a guided walk... 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...)	Presenting To speak fluently...in a way that captures and holds attention.	<u>Optional (1 – basic media):</u> Text contents To write simple interpretive texts for a leaflet or panels about a familiar a 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. Visual contents To select appropriate photos and illustrations that highlight important features in relation to the interpretive narrative.
5	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. 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.	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 the 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.	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... Guiding/involving To lead groups up to larger size autonomously, responsibly, safely and comfortably... To induce and manage group processes for groups of people with diverse backgrounds... Responding (more to be selected...)	

EQF level	Generic competence areas			
	Evaluation	Promotion	Management	Training
3				
4	<p>To seek informal visitor feedback during delivery and flexibly adjust and optimise their own delivery.</p> <p>To employ simple methods of self-evaluation and improve the quality of personal interpretation delivery, e.g. in terms of visitor satisfaction.</p>	<p>Interpretive offers To promote a guided tour or an event locally by disseminating basic information through heritage and tourism organisations and local media.</p>	<p>Self-management To reliably deliver personal interpretation on time in an appropriate manner.</p> <p>To self-reflect on one's own level of competences in specific working contexts in heritage interpretation of lower complexity.</p> <p>To, identify professional development opportunities .</p>	
5		<p><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.</p> <p>To design promotional flyers and posters for interpretive products and events.</p> <p>To promote one's own site and its interpretive products through the internet</p> <p><u>Optional (2 – freelancers):</u> Business To promote one's own freelance interpretive guiding service towards potential customers.</p>	<p>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.</p> <p>To accountably comply with legal requirements for guided walks (e.g. taxes, insurances, legal liabilities and approval procedures).</p> <p><u>Optional (1 – basic media):</u> 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.</p> <p><u>Optional (2 – freelancers):</u> Business To manage one's own freelance interpretive guiding business.</p>	

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

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.

A curriculum outline⁵ then describes the appropriate learning environments that reflect typical real world situations from the range of contexts. Finally methods and methodologies of facilitating learning in a competence oriented way and course material needs to be devised that supports reaching 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 required 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 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 and lifelong learning of adult education staff.

Testing in practice will reveal how the competence matrix needs to be further developed and adapted for different purposes. This matrix should not be conceived as a static document but as a reference framework that will change over time as needs are identified.

⁵ Three examples for curriculum outlines are developed within the InHerit project in order to demonstrate this approach.

B 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.

1 Heritage interpretation in the context of education

Several definitions have been suggested within the profession of heritage interpretation. 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 and collections.

Characteristics (in comparison to other forms of education):

- Visitors should perceive interpretation as an interesting and enjoyable visitor service that enhances their heritage experience. Nevertheless heritage interpretation is a structured approach to facilitate learning processes (= educational activity).
- Interpretation works from the specifics of a site or collection towards more universal ideas, i.e. it focuses on concrete phenomena and selected facts, in order to facilitate wider and deeper understanding by embedding the specifics in meaningful contexts.
- Interpretation specialises in a range of non-captive target audiences,
 - through addressing their needs,
 - through raising expectations and fulfilling them,
 - through involving audiences in the learning process by relating the content to their knowledge, interests, feelings and values, by encouraging discovery, engaging senses and by stimulating critical reflection
- Interpretation often encourages the expansion of horizons of understanding and overcoming stereotypes.

The power of professional interpretation within non-formal education comes from its low-threshold accessibility, its high credibility and from its power to link the experience with the authentic place and / or object. Interpretation facilitating such first-hand experience makes things more real compared to, for instance media consumption elsewhere.

2 Range of contexts

This section is not intended as an exhaustive study of the field, but to give an idea of the range of contexts within which interpretation is delivered, and therefore defines the competences interpreters might need. When using the matrix for purposes of curriculum development, training needs analysis or job profiles, it is useful to check whether or not the following contexts need to be addressed in full. Often one can narrow down the range of contexts and describe the relevant competences in more specific terms.

- 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

Visitors can come from the local neighbourhood and others can be international tourists from other continents with very different cultural backgrounds.

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 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 there are also many that 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 very often they depend on external project funding.

In most countries NGOs and charities play an important role in the heritage and heritage interpretation sector. As the size of such non-profit organisations can vary considerably, so can 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 various privately owned heritage sites and museums, again of various sizes.

There are also consultancy and design companies active in this field, freelancers or medium-sized companies that offer the whole spectrum from architecture and interior design, to exhibition design and interpretation, 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 achieve 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 provide opportunities to reflect on the learners' identities, beliefs and ethics.

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'.

3 Range of interpretive products

An 'Interpretive product' is 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.⁶ 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.

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 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.

4 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 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.

⁶ '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 guided visit at 10:00 through the nearby nature reserve.

- 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 management, experts with diverse disciplinary backgrounds, civil society organisations and interested citizens.

Autonomy and responsibility:

- from delivering interpretation which has been developed by others under supervision with some autonomy and responsibility (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, office staff but also conservators and researcher) or people living in the vicinity who frequently encounter (potential) visitors.</p> <p>Their role is to provide some advice and guidance in a visitor-oriented manner regarding opportunities to enjoy the heritage and interpretive offers (c.f. 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.</p> <p>Every interpretive guide, including junior volunteers, who carries the responsibility for the safety and well-being of a group of adults or children.</p> <p>They are not fully competent to autonomously develop a personal interpretation programme, and need mentoring and supervision by an experienced interpreter.</p> <p>Typically level 4 competences would be achieved through some basic training or informal learning.</p>

5	<p>Interpretation staff (and sometimes 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 guide who are specialised in one thematic and spacial area.</p> <p>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.</p> <p>After some experience they can train, mentor and supervise volunteers and junior staff at their home site.</p> <p>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.</p> <p>They can also deal with specialised academic findings related to their own disciplinary focus.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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	<p>They work at the most advanced frontiers of the professional field further developing and innovating the philosophy, theory, principles and methodologies and techniques of heritage interpretation.</p> <p>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.</p> <p>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.</p>

C Competence areas in the field of heritage interpretation

1 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, to 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	(1) 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>(1) 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 based on popularised literature about the site or museum where one works or lives <p>Phenomena</p> <p>(2) 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>(3) To check the familiar site for potential problems of physical accessibility for visitors.</p> <p>Impact assessment</p> <p>(4) To identify easily predictable threats of bringing visitors to a place to its heritage assets and environment.</p>
5	<p>Heritage interpretation</p> <p>(1) To familiarize oneself with publications on heritage interpretation and to evaluate their relevance for ones own interpretive work.</p> <p>Content research</p> <p>(2) To identify appropriate material for interpretation in the field of ones 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.</p> <p>(3) To identify potential content elements based on exchange with experts in the subject and on literature research in the field of ones own thematic / regional specialisation and evaluate the material with regard to a site's interpretive potential.</p> <p>Phenomena</p> <p>(4) To evaluate unfamiliar sites within the field of ones own thematic / regional specialisation with regard to compelling and also less obvious phenomena that can be used for first-hand visitor experience.</p> <p>Supporting infrastructure</p>

EQF level	Overview on research competences in the professional field of heritage interpretation:
	<p>(5) To systematically assess a site for potential problems of physical accessibility and orientation for visitors.</p> <p>Impact assessment</p> <p>(6) 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.</p>
6	<p>Heritage interpretation</p> <p>(1) 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 ones own working context.</p> <p>Content research</p> <p>(2) To familiarize oneself with the academic heritage literature in a broader field of thematic or regional specialisation.</p> <p>(3) To evaluate original academic publications in the field of ones thematic / regional specialisation with regard to an unfamiliar site's interpretive potential.</p> <p>(4) To identify appropriate material for interpretation in the broader field of ones 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.</p> <p>Audience and stakeholder research</p> <p>(5) To commission and/or design and carry out simple visitor research.</p> <p>(6) To research the market for potentially competing interpretation products and themes and to identify niches regarding themes and target audiences.</p> <p>Site infrastructure</p> <p>(7) 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.</p> <p>Impact assessment</p> <p>(8) To systematically assess risks of bringing visitors and interpretive infrastructure for the integrity and authenticity of heritage assets including their environment.</p>
7	<p>Heritage interpretation</p> <p>(1) 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.</p> <p>(2) To search for relevant theoretical background and good practice on interpretation in order to develop a proper methodology for problem solving and specific challenges.</p> <p>(3) To familiarise oneself with important technical and academic literature from neighbouring disciplines that are linked to heritage interpretation.</p> <p>Content research</p> <p>(4) 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.</p> <p>(5) 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.</p> <p>Audience and stakeholder research</p> <p>(6) To analyse various stakeholders' perspectives and interests related to heritage sites/</p>

EQF level	Overview on research competences in the professional field of heritage interpretation:
	<p>phenomena/ objects.</p> <p>(7) To commission and/or design and carry out advanced visitor research.</p> <p>(8) 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.</p>
8	<p>Heritage interpretation</p> <p>(1) To critically reflect and advance heritage interpretation philosophy, theory and methodologies.</p> <p>(2) To research the common grounds and differences between heritage interpretation and neighbouring disciplines that can contribute to or benefit from heritage interpretation.</p> <p>(3) To research the contributions heritage interpretation can make for the society and policy making.</p>

2 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>(1) 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>(2) To integrate a briefing and follow advice from a mentor or supervisor while preparing a guided walk at a familiar place.</p> <p>Visitor orientation</p> <p>(3) To identify the needs of a given priority target audience and take them into account when preparing the tour.</p> <p>(4) To prepare questions, issues, inputs that provoke the target audience to reflect and to get involved.</p> <p>(5) To adapt ones own tour to meet the particular needs and interests of a special target audiences.</p> <p>Itinerary</p> <p>(6) To devise an itinerary that is suitable for the main target audience and does not negatively impact on heritage assets.</p> <p>Conceptualisation</p> <p>(7) To devise a simple interpretive narrative that structures the main content elements in relation to perceivable phenomena along an itinerary.</p> <p>Planning document</p> <p>(8) To write a basic outline interpretive plan that summarises the preparation for a simple</p>

EQF level	Overview on planning competences in the professional field of heritage interpretation:
	interpretive walk.
5	<p>Interpretation principles</p> <p>(1) 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.</p> <p>Following guidance</p> <p>(2) 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.</p> <p>Facilitation</p> <p>(3) To communicate, negotiate and solve problems within a project team and with important local stakeholders.</p> <p>Visitor orientation</p> <p>(4) To define a priority target audience, and to tailor all planning and conceptualisation towards this target audience.</p> <p>(5) To define secondary target audiences whose special needs will be systematically addressed.</p> <p>Itinerary</p> <p>(6) 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>Conceptualisation</p> <p>(7) To develop an interpretive theme within a familiar field (topic) for a familiar heritage site or place (where one is employed).</p> <p>(8) To conceptualise a narrative structure along the itinerary for the interpretive theme based on the available phenomena and other content elements.</p> <p>(9) 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.</p> <p>(10) To influence visitors' behaviour and manage visitor flows through interpretation and supporting infrastructure.</p> <p>(11) To propose an interpretive product (a form of personal or media delivery) suitable for the setting and target audience.</p> <p>Planning document</p> <p>(12) 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.</p> <p>(13) To calculate a budget for the implementation of the interpretive plan.</p>

EQF level	Overview on planning competences in the professional field of heritage interpretation:
6	<p>Interpretation principles</p> <p>(1) To follow interpretation principles and philosophy while using up-to-date interpretive planning methodologies, methods and instruments.</p> <p>Facilitation</p> <p>(2) To involve stakeholders via participatory planning processes, and to communicate, negotiate and solve problems in collaboration with the project team and employer (or customer).</p> <p>Visitor orientation</p> <p>(3) To define a target audience profile, and to tailor all planning and conceptualisation towards the selected priority and secondary target audiences.</p> <p>(4) To identify issues, phenomena, views and events fit for the purpose of involving and actively engaging visitors in heritage interpretation and dialogue.</p> <p>Itineraries</p> <p>(5) 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.</p> <p>Conceptualisation</p> <p>(6) To develop interpretive themes based on materials that are mainly related to one's own disciplinary specialisation, also for unfamiliar heritage sites or places.</p> <p>(7) 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.</p> <p>(8) 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.</p> <p>(9) To propose interpretive products and media suitable for the setting and the major target audiences.</p> <p>Planning document</p> <p>(10) 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.</p> <p>(11) To calculate a budget for the implementation of the interpretive plan.</p>
7	<p>Interpretation principles</p> <p>(1) To devise tailor made interpretive planning methodologies adapted to special and complex planning tasks (e.g. complex multiple media exhibitions for a range of diverse target audiences or master plans for complex sites and destinations) in various contexts.</p> <p>Facilitation</p> <p>(2) To involve experts from various disciplinary backgrounds as well as civil society and community stakeholders as appropriate through participatory planning processes.</p> <p>(3) 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.</p> <p>Visitor orientation</p> <p>(4) To devise innovative and tailor-made ways of involving and actively engaging visitors</p>

EQF level	Overview on planning competences in the professional field of heritage interpretation:
	<p>in heritage interpretation and dialogue.</p> <p>Itinerary</p> <p>(5) To develop multiple complementary itineraries based on the 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.</p> <p>Conceptualisation</p> <p>(6) To develop interpretive themes based on multi-disciplinary materials at a wide range of different types of museums, heritage sites, places or protected areas.</p> <p>(7) 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.</p> <p>(8) 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.</p> <p>(9) To devise a range of complimentary interpretive products and media suitable for the setting and all priority and secondary target audiences.</p> <p>Planning document</p> <p>(10) 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.</p> <p>(11) To produce and present a multiple target audience interpretive master plan comprising a limited number of heritage sites or museum units.</p> <p>(12) To calculate a budget for the implementation of a complex interpretive plan.</p>
8	<p>Facilitation</p> <p>(1) To involve management of several and diverse civil society organisations and community representatives as appropriate through participatory processes in master planning.</p> <p>Conceptualisation</p> <p>(2) To develop a thematic framework for a number of sites and museums.</p> <p>(3) 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.</p> <p>Planning document</p> <p>(4) 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.</p>

3 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> <ul style="list-style-type: none"> (1) To make visitors to a place feel welcome. (2) To provide guidance for visitors (to help them choose what they want to see/do and how to get there). (3) To respond autonomously and appropriately to priority audience segments with a similar range of different attitudes, views and feelings about local heritage and values.
4	<p>Presenting</p> <ul style="list-style-type: none"> (1) To speak fluently and articulate clearly in a way that captures and holds attention. (2) To explain topics and ideas of limited complexity in simple words and images that are easily accessible to non-expert audiences. (3) To make appropriate use of props and supporting media. (4) 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. (5) To play a minor role in costumed live interpretation under guidance of an experienced live interpreter. <p>Guiding/involving</p> <ul style="list-style-type: none"> (6) To lead groups up to medium size (up to 20) safely and comfortably through an itinerary. (7) To induce and manage group processes for small and mediums sized rather 'uncomplicated' groups. (To evoke and manage questions, issues, inputs and dialogues among a rather similar group of visitors.) <p>Responding</p> <ul style="list-style-type: none"> (8) To respond autonomously and satisfactory to priority and secondary audience segments with a similar 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 view. (9) To flexibly respond to the needs and interests of people while keeping on track regarding theme and timing. (10) To autonomously and flexibly respond to unforeseeable challenges (e.g. an emergency) in an appropriate way at one's site. (11) To appropriately answer questions on basic facts and core concepts related to the site's main thematic focus.

5**Presenting**

- (1) 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.
- (2) To develop and make appropriate use of props and supporting media that illustrate the content.
- (3) 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.
- (4) To help visitors with various and diverse backgrounds build in personal meanings and connections with the heritage resource.
- (5) To ensure that the interpretive presentation of a theme, despite inevitable simplifications for non-expert target audiences, is credible, appropriate and accurate.
- (6) To play a role in costumed live interpretation under the guidance of an experienced live interpreter.

Guiding/involving

- (7) To lead larger groups of more than 20 participants autonomously, responsibly, safely and comfortably through an itinerary.
- (8) 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.)

Responding

- (9) To provide guidance for visitors beyond ones 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.
- (10) To respond autonomously and appropriately to diverse audiences with a wider range of attitudes, views, and feelings about local heritage and heritage values.
- (11) To autonomously and flexibly respond to unforeseeable challenges (e.g. an emergency) in an appropriate way *in relatively safe environments*.
- (12) 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>	<p>Presenting</p> <ul style="list-style-type: none"> (1) 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. (2) 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). (3) To direct a team delivering advanced forms of multi-person interpretation, such as performances, costumed live interpretation with different characters. (4) To ensure that the interpretive presentation of a <i>theme which involves multiple perspectives</i>, despite inevitable simplifications for non-captive target audiences, is well balanced, credible, appropriate, transparent and accurate. <p>Guiding/involving</p> <ul style="list-style-type: none"> (5) To lead groups of an appropriate size autonomously and responsibly <i>in complex and potentially dangerous environments</i>. (6) To coordinate assistant guides in order to lead large groups safely and comfortably through an itinerary in a complex environment. (7) 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 divers group of visitors.) <p>Responding</p> <ul style="list-style-type: none"> (8) To respond autonomously and appropriately to diverse audiences with a range of different attitudes, views, and feelings about heritage and related values. (9) To appropriately answer questions on facts and concepts and ideas related to the site and its broader thematic context. (10) To autonomously and flexibly respond to unforeseeable challenges (e.g. an emergency) in an appropriate way <i>in potentially dangerous environments</i>.
<p>7</p>	<p>Presenting</p> <ul style="list-style-type: none"> (1) To ensure that the interpretive presentation of a <i>complex theme that involves multiple disciplines</i>, despite inevitable simplifications for non-captive target audiences, is well balanced, credible, appropriate and accurate. (2) To further develop and deliver guidance, tools and techniques in personal delivery skills for heritage interpretation. <p>Responding</p> <ul style="list-style-type: none"> (3) 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</p>	<p>not applicable</p>

4 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>(1) To write simple interpretive texts for a leaflet or panels about a familiar a 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>(2) To select appropriate photos and illustrations that highlight important features in relation to the interpretive narrative.</p> <p>(3) To produce photos of decent quality that highlight important features in relation to the interpretive narrative.</p> <p>(4) To produce illustrations of decent quality that highlight the important features in relation to the interpretive narrative.</p> <p>Media Design</p> <p>(5) To create simple interpretive layouts for panels or brochures that communicate well.</p>
5	<p>Text contents</p> <p>(1) 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>(2) To produce or select quality photos that highlight the important features in relation to the text and to process photos for print.</p> <p>(3) To produce interpretive illustrations that highlight important features and visualise concepts and relationships supporting the interpretive narrative.</p> <p>(4) To produce simple interpretive films that highlight important features and visualise concepts and relationships supporting the interpretive narrative.</p> <p>(5) 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>(6) To create interpretive layouts for panels or brochures that communicate well for multiple target audiences.</p> <p>(7) 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>(8) To design simple electronic media that integrate interpretive texts (written and spoken), sounds and visualisations supporting the interpretive narrative.</p> <p>(9) 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	<p>Text contents</p> <p>(1) To write, on the basis of an interpretive plan, multi-layered interpretive texts and storyboard dialogues <i>related to one's main academic and regional specialisations</i> that are tailored towards diverse media for different target audiences.</p> <p>(2) To ensure that the interpretive presentation of a theme <i>that involves multiple</i></p>

	<p><i>perspectives</i>, despite inevitable simplifications for non-captive target audiences, is well balanced, credible, appropriate, transparent and accurate.</p> <p>Visual and audio contents</p> <p>(3) To produce interpretive films with a team of actors that highlight important features and visualise concepts and relationships supporting the interpretive narrative.</p> <p>(4) 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.</p> <p>(5) To develop interpretive electronic reconstructions and animations, that highlight important features and visualise concepts and relationships and create an atmosphere supporting the interpretive narrative.</p> <p>Media Design</p> <p>(6) To design cost-effective and sustainable, multi-layered audio, audio-visual devices that go well with the interpretive narrative, artwork and ambiance of the place.</p> <p>(7) To design <i>simple</i> electronic media that integrate interpretive texts (written and spoken), sounds and visualisations supporting the interpretive narrative.</p> <p>(8) To design cost-effective and sustainable mounts for interpretive media that go well with the interpretive narrative, artwork and ambiance of the place.</p>
7	<p>Text contents</p> <p>(1) To write, on the basis of an interpretive plan, complex multi-layered interpretive texts and storyboard dialogues <i>related to interdisciplinary content</i> that are tailored towards diverse media for different target audiences.</p> <p>(2) To ensure that the interpretive presentation of a <i>complex, multiple disciplinary</i> theme, despite inevitable simplifications for non-captive target audiences, is well balanced, credible, appropriate, transparent and accurate.</p> <p>Visual and audio contents</p> <p>(3) To develop <i>complex interpretive virtual reconstructions and animations</i> for electronic media, that highlight important features and visualise concepts and relationships and create an atmosphere supporting the interpretive narrative.</p> <p>Media Design</p> <p>(4) To design state-of-the-art interactive electronic media that integrate interpretive texts (written and spoken), sounds and visualisations supporting the interpretive narrative.</p>
8	not applicable

5 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	(1) To reflect on lessons to learn from visitor encounters.
4	(1) To seek informal visitor feedback during delivery and flexibly adjust and optimise one's

	<p>own delivery.</p> <p>(2) 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.</p> <p>(3) To employ post-visit evaluation techniques that have been developed and will be analysed by an internal or external evaluator.</p>
5	<p>(1) To choose and employ simple methods of formative evaluation, testing and optimisation as part of interpretation planning and delivery for an interpretive product.</p> <p>(2) To prepare and perform peer-review processes.</p> <p>(3) To adapt and employ summative evaluation techniques jointly with an internal or external evaluator.</p> <p>(4) To commission to competent external interpretation evaluators in order to gain evidence of performance and suggestions for improvement.</p>
6	<p>(1) To define indicators and measurement methods in order to monitor the level of performance of interpretation regarding the effects on different audience segments.</p> <p>(2) To design methodologies and cost-effective methods of formative evaluation and testing in order to optimise interpretation planning and delivery.</p> <p>(3) 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.</p>
7	<p>(1) 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.</p>
8	<p>(1) 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.</p> <p>(2) To develop policy recommendations based on evaluation data.</p>

6 Promotion and advocacy

Appropriate promotion is an important and often underestimated part 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	<p>Interpretive offers</p> <p>(1) To raise interest and visitors' expectations of a place's heritage and its interpretive products through informal talks.</p>
4	<p>Interpretive offers</p> <p>(1) To promote a guided tour or an event locally by disseminating basic information using relevant distribution channels, such as heritage and tourism organisations and local media.</p>
5	Interpretive offers

	<ul style="list-style-type: none"> (1) To write promotional texts that are tailored to the priority target audience and raise appropriate expectations regarding interpretive products and events. (2) To design promotional flyers and posters for interpretive products and events. (3) To promote one's own site and its interpretive products through the internet. (4) To promote an interpretive product or an event appropriately through regional mass media, such as newspapers and radio by preparing a press release. (5) To develop interpretive souvenirs that pay tribute to the heritage site or object and are related to the interpretive narration and place characteristics. (6) To distribute promotional materials such as souvenirs available on site and locally. <p>Business</p> <ul style="list-style-type: none"> (7) To promote one's own freelance or small and medium-sized interpretive business towards potential clients.
<p>6</p>	<p>Interpretive offers</p> <ul style="list-style-type: none"> (1) To devise a promotion plan for interpretive products and programmes. (2) To write promotional texts that are tailored to various specified target audiences and raise appropriate expectations regarding interpretive products. (3) 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. (4) To promote interpretive products towards heritage tour operators. (5) To contribute to the development of the promotional campaign for a site, organisation or tourism destination. <p>Advocacy</p> <ul style="list-style-type: none"> (6) To ensure that the interpretive communication strategy is properly transferred into marketing strategies. (7) To promote professionalism in heritage interpretation within an existing organisation, a local community and a tourism destination. (8) To provide advice for marketing units at tourism destinations and heritage organisations on adequate promotion of interpretive sites. <p>Business</p> <ul style="list-style-type: none"> (9) To develop and implement a marketing strategy for one's own interpretive business.
<p>7</p>	<ul style="list-style-type: none"> (1) To develop and deliver guidance, tools and techniques for marketing interpretive heritage sites. <p>Interpretive offers</p> <ul style="list-style-type: none"> (2) To develop a marketing strategy for complex interpretive heritage sites, destination management bodies and heritage organisations. <p>Advocacy</p> <ul style="list-style-type: none"> (3) To promote professionalism in heritage interpretation at senior management and policy making level within a bigger organisation or a bigger destination.
<p>8</p>	<p>Advocacy</p> <ul style="list-style-type: none"> (1) To promote the profession of heritage interpretation at regional, national and international policy making bodies and civil society organisations.

7 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 closely related to 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> <ul style="list-style-type: none"> (1) To reliably deliver personal interpretation on time in an appropriate manner. (2) To self-reflect on one's own level of competences in specific working contexts in heritage interpretation of lower complexity. (3) To, identify professional development opportunities in order to acquire or enhance one's own competences in the field of heritage interpretation. <p>Compliance</p> <ul style="list-style-type: none"> (4) 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. (5) To accountably comply with legal requirements for guiding a group of adults and / or children.
5	<p>Self-management</p> <ul style="list-style-type: none"> (1) To reliably deliver tasks and deliverables on time in an appropriate manner. <p>Compliance</p> <ul style="list-style-type: none"> (2) 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. (3) 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). (4) 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. (5) To recognise which competences in the field of heritage interpretation are needed to effectively perform in a specific working context. <p>Personnel</p> <ul style="list-style-type: none"> (6) To coordinate a team of personal interpreters, volunteers and staff, with regard to cost-effective financial and human resources allocation, timing and monitoring quality. (7) To evaluate a person's level of competences in the field of heritage interpretation for working contexts of low complexity. (8) To evaluate whether it is more cost-effective / appropriate to invest in 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. (9) To coordinate maintenance works for interpretive facilities and supporting

infrastructure.

Project management

- (10) To coordinate the planning and delivery of media-based interpretive products of low complexity, such a self-guided trail, with regard to cost-effective financial and human resources allocation, responsibilities, monitoring and change management.
- (11) To coordinate works of low complexity ensuring that all fit together in order to facilitate a holistic interpretive visitor experience.
- (12) 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.
- (13) 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.
- (14) To negotiate specifications for commissioning external evaluation and interpretive plans of medium to higher complexity and to ensure an appropriate budget.

Business

- (15) 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. (c.f. media delivery).

6

Compliance

- (1) 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.
- (2) 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).
- (3) To supervise personnel regarding the planning and delivery of interpretation in compliance with legal requirements, the organisation's interpretation policy and professional ethics.
- (4) To recognise which competences in the field of heritage interpretation are needed to effectively perform in a wider range working contexts of higher complexity.

Personnel

- (5) 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.
- (6) To evaluate a persons level of competences in the field of heritage interpretation for working contexts of medium complexity.
- (7) 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.
- (8) 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

- (9) To coordinate the planning and delivery of media-based interpretive products of medium complexity, such as performances and exhibitions, with regard to cost-

	<p>effective financial and human resources allocation, responsibilities, milestones and monitoring and change management.</p> <p>(10) To coordinate works of medium complexity ensuring that all fit together in order to facilitate a holistic interpretive visitor experience.</p> <p>(11) 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.</p> <p>(12) 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.</p> <p>(13) To negotiate specifications for commissioning external evaluation and interpretive plans and master plans of high complexity and to ensure appropriate budgets.</p> <p>Business</p> <p>(14) To manage ones own freelance business or small company in interpretive guiding or a branch of interpretive media delivery such as writing, illustrations etc. (c.f. media delivery).</p> <p>Strategic</p> <p>(15) To derive realistic goals for interpretive learning and visitor management from the organisations' mission and goals while taking goals and interests of other stakeholders into account.</p> <p>(16) To develop strategies and guidelines for integrating site protection, visitor safety and interpretation.</p> <p>(17) 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.</p> <p>(18) To develop strategies in the areas of sponsoring, crowd funding, fees, donations acquisition and merchandising.</p>
7	<p>Compliance</p> <p>(1) 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.</p> <p>(2) To coordinate works of high complexity ensuring that all fit together in order to facilitate a holistic interpretive visitor experience.</p> <p>(3) 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.</p> <p>(4) To supervise personnel regarding the planning and delivery of interpretation in compliance with legal requirements, the organisation's interpretation policy at various sites and professional ethics.</p> <p>Personnel</p> <p>(5) 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.</p> <p>(6) To devise CPD plans in heritage interpretation for an organisation, setting targets for</p>

	<p>training and monitoring progress towards them.</p> <p>(7) To negotiate learning agreements with volunteers and staff and to advise people on career development in heritage interpretation.</p> <p>(8) To formally validate and certify the competences of a person in the field of heritage interpretation achieved through informal learning.</p> <p>Project management</p> <p>(9) 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.</p> <p>(10) 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.</p> <p>(11) 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.</p> <p>Business</p> <p>(12) 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.</p> <p>Strategic</p> <p>(13) To derive realistic interpretive learning goals and visitor management goals from any organisations' mission and aims while taking aims and interests of other stakeholders into account.</p> <p>(14) 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.</p> <p>(15) To develop strategies, policies and guidelines for integrating site protection, visitor safety and interpretation for various sites or branches of an organisation.</p>
8	<p>(1) 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.</p> <p>(2) 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.</p> <p>(3) 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.</p>

8 Training

This area of competence needs to be further elaborated.

EQF level	Overview on training competences in the professional field of heritage interpretation:
3	not applicable

4	not applicable
5	<ul style="list-style-type: none"> (1) To <i>adapt</i> training curricula in a competence-oriented way in order to suit the professional development needs of a group of learners <i>in-house</i> at one's own heritage site. (2) To deliver tailored <i>in-house training</i> to meet the needs of volunteers, junior staff and stakeholders at one's own heritage site. (3) To mentor volunteers and junior staff at one's own heritage site.
6	<ul style="list-style-type: none"> (1) 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. (2) 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. (3) To mentor heritage interpretation employees who work in a sector of heritage interpretation in which one is competent and experienced.
7	<ul style="list-style-type: none"> (1) To design curricula for competence-oriented higher education courses or programmes that are tailored students who intend to work in the field of heritage interpretation. (2) 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. (3) To deliver introductory courses at higher education level and / or advanced courses that help students to gain specialised competences. (4) To mentor heritage interpretation staff, including senior staff or business owners, who work in a sector of heritage interpretation in which one is specialised. (5) To formally validate and certify the competences of a person in the field of heritage interpretation achieved through formal, non-formal and informal learning.
8	<ul style="list-style-type: none"> (1) To assess the market for training in the field of heritage interpretation and produce appropriate training products.

D Appendix: Definitions and explanations

Competence a person's ability to effectively perform a task or activity in a specified range of real world contexts.

In order to fully specify a competence one needs to specify

- the range of real world contexts it refers to, and
- the performance (including the task that a person needs to be able to perform, the level of autonomy and responsibility of the performing person, and the quality of the envisaged result)

A word on terminology:

In educational sciences the word '*competence*' is a technical term with a holistic meaning (from which our definition has been developed). 'Competence' must not be confused with the term '*competency*', although both words are more or less interchangeable in everyday language. In educational science '*competency*' is another technical term with a different, more specific meaning that was popular some decades ago. Furthermore, the EQF uses the word '*competence*' in a very different way which denotes the level of 'autonomy and responsibility'.

In this document and the InHerit project the word '*competence*' always refers to the above defined concept which is in line with the current approaches in educational sciences in the context of competence oriented adult learning.

Learning outcomes are the result of a formal, non-formal or informal learning process. In education and training contexts three types of learning outcomes are usually distinguished: knowledge, skills and attitudes.

Competence-oriented learning outcomes comprise all learning outcomes in terms of knowledge, skills and attitudes required for a specified competence, i.e. for being able to effectively perform in a specified range of real world contexts.

Interpretation: several definitions have been developed within the profession. In the context of the EU's education policies and the wider field of educational science, interpretation can be defined as a non-formal approach to facilitate place-based learning for heritage site or museum visitors (see also page 9)

Interpretive: explanatory, informal and easy to follow in style, structured in a way which contributes to arouse interest, to relate the site or collection to the audience and to provide substantial insights on-site that reveal meanings and the significance of heritage assets in an enjoyable, engaging and enriching way.

Interpretive product: a whole entity of interpretation that can be 'consumed' during a site visit; such an entity comprises the interpretive content which is well structured according to an interpretive narrative and interpretive facilities that carry / transport the content. Examples for interpretive products are: a single panel or smart phone content at a singular point of interest, a thematic guided tour, a self-guided trail with a sequence of stops, or a complex exhibition at a museum or visitor centre that develops a theme through an interpretive narrative.

Interpretive facilities: physical structures that carry or support the interpretive content such as an exhibition or a self-guided trail with installations, selected media (such as captions or panels, displays, dioramas, audio devices etc.) as well as supporting infrastructure (such as orientation systems, footpaths, toilets, catering, places to rest etc.).

Interpretive theme: an overarching idea that an interpretation develops. This is to be distinguished from the 'topic' which is merely the subject matter, while an interpretive theme makes a meaningful main point about a topic. In the context of interpretation 'theme' is a technical term which must not be confused with 'topic' while in everyday language both words are more or less interchangeable.

Narrative: A spoken or [written account](#) of [connected events](#); a [story](#) "Narrative is a fundamental structure of human meaning making" (Bruner 1986). "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" (M. Rossiter 2009).

Interpretive narrative: the carefully structured content of an interpretive product, that aims to capture and hold an audience's attention and to facilitate effective revelations of new insights, perspectives and ideas. An interpretive narrative, either linear or non-linear, combines content elements to a meaningful whole, or a 'larger truth' (Tilden 1957).

Content element: a smaller piece of meaning that can be integrated into a narrative structure such as an original phenomenon, an image, a fact, a reference to a thing, a place, a person or an event, a property, a relation, a meaningful combination of those such as a short story, a concept or an idea that the interpreter decides to be included or left out the interpretive narrative.

Heritage: we use 'heritage' in a wide sense to cover 'all that has been handed down to us from the past'. It can denote natural and man-made phenomena and structures that have been created or shaped in the past, including the most recent past, e.g. works of contemporary art. Intangible heritage consists of non-material entities such as ephemera, customs, music, song and dance that need to be performed, as well as beliefs, places of memory, etc.

Phenomenon: a meaningful feature or structure of a site or an object that can be perceived by people using one or more senses. It gains its meaning(s) only in relation to a context.

Site: the place where heritage is located *in situ*, e.g. an archaeological excavation, a historic building and / or garden, architectural ensembles, land use artifacts and structures, battlefields or other places of memory. In a wider sense also national and regional parks, nature reserves or other protected areas, geo- and bio-topes can be considered as 'sites'.

Collections: places where pieces of natural and cultural heritage are collected such as museums and archives, zoos and botanical gardens.

Visitors / audience: people who visit the heritage site.

Visitors in this sense can come from the local community, e.g. the immediate neighbourhood or another city quarter, they may come for a day trip from the region or they can be domestic or international tourists.

In the context of interpretation these visitors come mainly in their leisure time, i.e. they are normally a non-captive audience. The content must be delivered in an easy-to-follow and attractive way for non-experts in the subject matter. No special knowledge, relationship to, or interest in the theme can be presupposed.