

“Training plan on European cultural heritage interpreter in rural areas”

**Rural Heritage** 2020-1-ES01-KA202-082577



**RURAL  
HERITAGE**

# METHODOLOGICAL GUIDE

*“RURAL HERITAGE INTERPRETER”*

2020 - 2022



Co-funded by the  
Erasmus+ Programme  
of the European Union

The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the authors' views and the Commission cannot be held responsible for any use which may be made of the information contained therein.





Project RURAL HERITAGE: Training plan on European cultural heritage interpreter in rural areas.  
Project ERASMUS+: 2020-1-ES01-KA202-082577.



# RURAL HERITAGE

Project RURAL HERITAGE: Training plan on European cultural heritage  
interpreter in rural areas

Project ERASMUS+: 2020-1-ES01-KA202-082577

## METHODOLOGICAL GUIDE

### *“RURAL HERITAGE INTERPRETER”*

NEW COMPETENCES & METHODOLOGY

INTELLECTUAL OUTPUT 1 (IO1)

2020 - 2022



Co-funded by the  
Erasmus+ Programme  
of the European Union

# IO1 - METHODOLOGICAL GUIDE OF THE NEW COMPETENCES ON RURAL HERITAGE INTERPRETER

## INDEX

<b>1. INTRODUCTION AND CONCEPTS.....</b>	<b>2</b>
<b>2. CURRICULUM OF THE NEW QUALIFICATION.....</b>	<b>8</b>
2.1. DESCRIPTION OF THE PROFESSIONAL PROFILE.....	9
2.1.1. General competence.....	9
2.1.2. Competence units .....	9
2.1.3. Associated Training Modules .....	10
2.1.4. Work fields and professional tasks.....	10
2.1.5. Professional field.....	12
2.1.6. Relevant jobs .....	12
2.1.7. Working conditions.....	12
2.1.8. Transversal competences (and personal characteristics) .....	13
2.2. DESCRIPTION OF THE COMPETENCE UNITS.....	14
2.2.1. COMPETENCE UNIT 1 (CU1): Design and development of interpretation activities on rural heritage .....	14
2.2.2. COMPETENCE UNIT 2 (CU2): Guide-interpreter of tangible & intangible rural cultural heritage .....	20
2.2.3. COMPETENCE UNIT 3 (CU3): Guide-interpreter of Natural Heritage and Cultural Landscapes. ....	28
<b>3. METHODOLOGY: NEW PEDAGOGICAL METHODOLOGIES FOR TRAINING ON INTERPRETATION OF EUROPEAN RURAL HERITAGE .....</b>	<b>35</b>
3.1. INTRODUCTION. GENERAL PRINCIPLES .....	35
3.2. DIDACTIC METHODOLOGY IN THE TRAINING OF HERITAGE INTERPRETERS .....	38
<b>4. GLOSSARY .....</b>	<b>42</b>

# 1. INTRODUCTION AND CONCEPTS



**RURAL  
HERITAGE**

# 1 INTRODUCTION AND CONCEPTS

Investment in education and skills are considered to be a core strategic asset for social and economic growth, innovation and increase of productivity. Qualification frameworks play a vital role in linking education objectives and programme. Qualifications are the formal outcome of an assessment and validation process by a competent authority and typically take the form of documents such as certificates or diplomas. They determine that an individual has achieved learning outcomes to given standards. The qualification profile or standard is a common, useful working tool to describe the qualification, which helps express ideas about skills, competences knowledge of a person after the completion of education i.e. provides an insight into the expected learning outcomes of the education and training process. Qualification profiles are the basis for the development of curricula for one or more programme.

3

Comparing descriptions of qualifications across Europe, it is clear that there is diversity of approaches regarding sources, degree of detail, form and structure as well as a lack of uniformity in the definition of learning outcomes. At the same time, there are similarities that enable us to build on development of transnational qualification\occupation profile - in the processes of qualification\occupation development, skills identification and referencing European Qualification framework.

## 1.1. ABOUT THE PROJECT “RURAL HERITAGE”

The RURAL HERITAGE project for innovation in VET proposes a training plan to support European policies that seek to make the European Cultural Heritage a factor of economic and social development. Rural cultural heritage offers great potential to revitalize rural areas where cultural tourism sector has an enormous potential for growth and job creation and there is a hidden tradition underexplored that must emerge to show the global heritage of Europe.

There is a need of interpreters capable of developing the tourism use of rural cultural heritage, in order to satisfy this growing demand. European VET system shows a clear need of tourism professionals specialized in rural cultural heritage, especially in interpretation and communication techniques.

An important role in vocational qualifications is also played by key competences that shape an individual's professional growth and enable them to perform various roles in society. Key competences are indispensable, not only for individual's working life but also from the point of view of personal development, inclusion in the wider social environment and lifelong learning.

It is important to support VET teachers through new competence units and innovative methodologies to facilitate knowledge and skills for tangible and intangible heritage interpretation in the future professionals. The project develops active and emotional teaching-learning strategies which will be eventually useful for the practice of heritage transmission in tourism activities.



The objectives of the project are:

- a) To contribute to professionalization and economic development based on heritage use in rural areas through a training plan and concrete intellectual outputs that can be used by trainers, students and rural population, enhancing access to training for all.
- b) To promote the European rural cultural heritage transmission and to contribute to improve the current professional qualifications thanks to the design of new competence units of "EUROPEAN RURAL HERITAGE INTERPRETER".
- c) To raise awareness of the importance of rural cultural heritage at the local, national and European levels and its mutual recognition, through the practice of heritage interpretation in tourism services.
- d) To encourage intercultural and intergenerational exchange as a way of European rural heritage approaching.

The project aims the involvement of target groups through a fluid exchange of experiences among a stakeholders' network and direct-indirect participants. The main target groups of the project are:

- 1) People from rural areas (non-qualified young and women, unemployed workers, tourism guides, entrepreneurs, owners of rural tourism hotels or companies, local authorities).
- 2) VET trainers, teachers and students from the formal and non-formal VET sector and the educational community and authorities.
- 3) Professionals related to tourism, heritage, environmental education, etc. and professionals of the rural development, regional and local administration, etc.

The project creates new professional competences, a European dimension and active-emotional methodologies that currently don't exist in VET, among other innovative strategies, all of which is included in this METHODOLOGICAL GUIDE (intellectual output 1-IO1) that describes the new competence units and the innovative pedagogical approach and whose main recipients are those included in the block 2 of the described target groups (VET sector).

## 1.2. ABOUT THE CONCEPT OF HERITAGE INTERPRETATION

The heritage interpretation purpose is relatively recent and can be traced back to around the middle of the last century with the first American theorists. The heritage interpretation, in its origins, was basically centred on the natural part of heritage, on the natural landscape, and little by little other concepts deriving from ecotourism or nature tourism, rural tourism and cultural tourism have been added, until today, when various fields related to heritage are covered.

From an academic point of view, one of the meanings of "heritage interpretation" is understood as the activity that facilitates the presentation of heritage to tourists, to visitors and/or to the general population, by means of different resources, methods and techniques, in such a way as to generate in the visitor a stimulation of the senses and feelings towards the interpreted heritage resource.



Interpretation, therefore, is based on cultural and/or natural evidence, material or immaterial, found in a given place, and seeks to promote, dynamize and conserve these elements in their original context. To this end, the aim is always the recovery *in situ* and the greatest possible contextualisation of heritage resources, giving the real meaning of the interpreted object or element.

Heritage Interpretation is an effective tool for communicating the meaning of heritage values, as stated in the White Paper on Environmental Education in Spain published in 1999 by the Ministry of the Environment, a document that is in line with international standards for Heritage Interpretation.

One of the first personalities and professionals who theorised and laid the foundations of Heritage Interpretation was **Freeman Tilden** (1883-1980), American writer and journalist, whom we should bear in mind when we talk about HI, who understood that "Interpretation is an educational activity which aims to reveal meanings and interrelationships through the use of original objects, by direct contact with the resource or by illustrative means, not merely to give information about the facts" definition to which we would add from our side "... stirring up sensations in the spectator in order to raise awareness of the historical value of the interpreted element".

When we talk about the interpretation of rural heritage, we do not intend to make a "point and apart" from the HI, but to proceed to establish a specific methodology for the rural environment and its heritage, which is specific and original to it. Our aim is to contribute to laying the foundations for the specificity that it deserves, in parallel with the methodology used in the interpretation of natural landscapes or relevant architectural elements of the urban environment.

We consider that European rural heritage must have its own space and specific methodology in the task of interpretation.

The European rural heritage interpreter is the professional who carries out a mediation action between the tourist or visitor and the meaning of the interpreted rural resource, so that visitors obtain a more complete experience and an attitude of empathy and respect towards the interpreted element is generated in them.

We share the view that if visitors come to understand the nature and characteristics of a place of heritage interest, they can enjoy it in a non-destructive way. On the other hand, we observe how valuable rural heritage elements, which are not subject to protection instruments (for example, buildings and houses built using traditional methods, techniques and materials), end up being destroyed or damaged by the owners themselves because they do not consider them to be relevant. This is where the work of the European Rural Heritage Interpreter can develop a pedagogical and awareness-raising task which, in addition to raising the awareness of tourists or visitors, can also raise the awareness of rural landowners.

*"In view of the growing number of visitors, the demand for the figure of Heritage Interpreter is increasing both from public administrations and private initiatives. The figure of Heritage Interpreter is understood as a person qualified to develop interpretative messages. A person capable of using Heritage Interpretation as a communication tool so that visitors to a space, place or element of heritage interest become interested in the heritage they are visiting and develop attitudes of*



*appreciation and custody towards it".* (Guide of recommendations for non-formal training in heritage interpretation - VI Seminar on Interpretation of Natural and Cultural Heritage CENEAM, Valsaín-Segovia, 9 -11 June 2011), a perfectly valid assessment for the European Rural Heritage Interpreter.

Interpretation has been talked about for more than seven decades, from an academic and training point of view, but very recently we have started to talk about the *interpretation of rural heritage* from a global point of view, including traditions or intangible heritage, historical heritage, ethnographic heritage and popular architecture, natural landscapes, but also anthropic landscapes.

It is the time to address, in a specific way, the training for the interpretation of Europe's rural heritage as a hallmark of identity, not only for the local communities who are the holders of that heritage, but for European society as a whole as a guarantor of the protection and safeguarding of that heritage. There are many benefits that we are convinced this vision can bring; heritage interpretation is a fundamental element of successful heritage conservation, it can inspire visitors to create a sense of individual and community pride, it makes visitors care about heritage; at the same time rural heritage interpretation will be the reason why visitors come to the heritage site and it helps visitors to create their own choice of ways to experience and learn about a site and its history.

The interpretation of heritage is one of the most important challenges for a modern heritage management". This is why the task of interpretation must become an essential part of heritage conservation and at the same time contribute to the social and economic dynamism of the rural environment.

### 1.3. ABOUT THE QUALIFICATION AND OCCUPATION PERSPECTIVES

The activity proposed in these Guidelines results in a profile of qualification that includes description of qualification: qualification level, scope, shared learning units etc. In this context, qualification profiles are developed to match future vocational qualifications in line with the new perspective on Cultural Heritage prosperity interpretation in several European countries, to enable people to acquire qualifications that will enable them to have satisfactory careers and career advancement or further education, and to develop vocational qualifications in accordance with provisions of the countries involved but also to promote lifelong learning principles for other age categories. The profile sets out the possible number of common learning outcome units.

Occupations in the traditional sense no longer follow the dynamics of the labour market. Instead, they express the complexity of the tasks that workers are required to perform, something that is constantly changing in the labour sphere. Increasingly rapid economic development, in particular the development of new technologies and services, is causing the constant upgrading of existing occupations and the development of new ones – or the upgrading and development of the vocational qualifications necessary to perform an occupation or a set of tasks within a given occupation.



This intellectual output, henceforth designated IO1, is based on the two analysis of VET Qualifications offer and analysis of competences for qualification profile Interpreter of Rural Heritage conducted in each Partner country.

The purpose of the Methodological guide of the new competences on Rural Heritage Interpreter is to set out the framework to develop new or update existing qualification at secondary level of education. The guide sets out to describe the structure and scope of the professional qualification and provides tips/recommendations to secure the appropriateness of particular international qualification.

International qualifications feed in the context of the development and implementation of two European initiatives: the European Qualifications Framework (EQF) and the European classification of skills/competences, qualifications and occupations (ESCO). The 2015 Joint Report of the Council and the Commission on the implementation of the strategic framework for European cooperation in education and training (ET 2020) specifies the need to increase transparency, comparability and recognition of skills and qualifications in EU. In order to realize these priorities, exchanging the information on economic indicators, technical development, socio-economic data and operational know-how of development of national qualifications is needed. It is also important to consider countries internationalization strategies and rationale for cooperation.

This guide does not aim to be a detailed manual for development of full so-called joint qualification for Interpreter of Rural Heritage and it is rather occupation profile and competences description orientated. Considering the individual countries, qualification frameworks and provisions of the regulatory bodies for development processes and recognition are different. The Guidelines describe some general principles and recommendations on procedures of the development of occupation profile at upper secondary level of education. The document also proposes a structure of the occupation profile for the occupation of interpreter of Rural Heritage. It contains forms to describe a qualification and form for the defined units of the learning outcomes as well as competences that are required.



## 2. CURRICULUM OF THE NEW QUALIFICATION



**RURAL  
HERITAGE**

## 2 CURRICULUM OF THE NEW QUALIFICATION

### 2.1. DESCRIPTION OF THE PROFESSIONAL PROFILE

We describe the new professional profile, that is, the different tasks that can be filled with the professional training, for whose identification we have used the occupational analysis and the inventory of the set of tasks that make up the occupation, based on the knowledge, skills and abilities necessary for its development.

The identification of the objectives of the professional profile and its competences is also based on a questionnaire designed by CPI (as partner expert on creation of new professional profiles), replied by different professional and experienced stakeholders involved in the subject of the project and in a previous analysis of the existing qualifications offer in the countries of the partnership.

Bellow we include the description of the main characteristics of the professional profile and the final competences based on those results.

If the aim is the rural heritage interpretation has to be realised as something that goes beyond the simple presentation of information and knowledge, there is no doubt that a certain communicative approach and a certain system of presentation and resource management must be employed.

**Title:** “Guide-Interpreter of the European Rural Heritage”

**Qualification level:** EQF 4

**Credits:** 12 (300 hours)

#### 2.1.1. General competence

- Carry out activities to revalue the European rural cultural heritage by turning it into a resource for the enjoyment of the population,
- using it as a tourist resource and designing and developing heritage interpretation activities focused on the rural areas,
- being able to analyse and identify elements with interpretive potential and their communication-interpretation to the visiting public through different interpretative media, techniques and supports for the interpretation of heritage, as a discipline and a tool to create some pleasant experiences for visitors (facilitating the connection between the visitors and the rural heritage) and an instrument of conservation of the rural heritage.

The rural heritage guide-interpreter is capable of accompanying individuals or groups in visits to rural areas interpreting, illustrating and presenting the values of their cultural and natural heritage and landscapes, in a safe way, respecting the applicable regulation of prevention of labour risks and security for the people as for the environment.

#### 2.1.2. Competence units

CU1: Carry out the design and development of heritage interpretation activities in rural areas.

CU2: Guiding and interpreting the tangible and intangible rural cultural heritage for tourists and visitors.

CU3: Guiding and interpreting the natural heritage and cultural landscapes for tourists and visitors.



### 2.1.3. Associated Training Modules

MODULE 1: Design and implementation of heritage interpretation activities in rural environment (75 hours)

MODULE 2: Guide-interpreter of the tangible and intangible rural cultural heritage for tourists and visitors. (150 hours)

MODULE 3: Guide-interpreter of the natural heritage and cultural landscapes for tourists and visitors. (75 hours).

### 2.1.4. Work fields and professional tasks

FIELDS OF WORK	PROFESSIONAL TASKS
<b>1. Analysis of information and identification of rural heritage resources with potential interest</b>	
SEARCH AND ANALYSIS OF INFORMATION	<ul style="list-style-type: none"> <li>- Identification and selection of accurate information sources on rural heritage.</li> <li>- Desk research and on-site research in rural areas including talks with local people</li> <li>- Search, selection and processing information on heritage resources.</li> <li>- Organization, processing and updating of information.</li> <li>- Interaction with the holders of the tradition and using various sources of information in the preparation of a management plan for the interpretation of cultural heritage.</li> </ul>
IDENTIFICATION OF RURAL HERITAGE RESOURCES POTENTIALLY INTERESTING	<ul style="list-style-type: none"> <li>- Analysis of the rural heritage resources (natural or cultural).</li> <li>- Identification of features with interpretive potential and interest from the point of view of tourism and heritage conservation</li> </ul>
ANALYSIS OF THE SPECIFIC TARGET GROUPS	<ul style="list-style-type: none"> <li>- Analysis of the audience (actual and potential).</li> <li>- Adapting information according to the type of audience.</li> </ul>
<b>2. Design interpretative products and tourist activities or services in relation to rural heritage</b>	
FIRST PROCESS OF INTERPRETATION	<ul style="list-style-type: none"> <li>- Determination of the most relevant inherent meanings of rural heritage resources</li> <li>- Creation of effective, creative and enjoyable interpretative messages adapted to the target groups</li> <li>- Selection of interpretative means and media to "connect" the visitors with the rural heritage.</li> </ul>
DESIGN OF INTERPRETATION ACTIVITIES AND PLANS	<ul style="list-style-type: none"> <li>- Selection of interpretative techniques to be used</li> <li>- Design of interpretative tourist activities or itineraries</li> <li>- Design and presentation of multimedia content and knowledge of contemporary approaches</li> <li>- Ability to use ICT for management and interpretation of natural and cultural heritage and distinguish ICT tools and choose the most suitable software for each planned activity</li> <li>- Elaboration of heritage interpretation plans as instruments for sustainable economic development and rural heritage conservation.</li> <li>- Performance of promotional activities to attract visitors</li> </ul>



<b>3. Planning and organizing</b>	
PLANNING/ORGANIZING	<ul style="list-style-type: none"> <li>- Planning the organizational activities (time scheduling, logistical, financial, security, etc.) for the implementation of the interpretation.</li> <li>- Managing financial activities and services (pricing of the service including calculation of costs, taxes, contributions and other charges) and take into account the concept of sustainable development</li> </ul>
<b>4. Management and implementation of interpretation activities, services or itineraries.</b>	
DEVELOPMENT OF HERITAGE INTERPRETATION WITH PEOPLE OR GROUPS	<ul style="list-style-type: none"> <li>- Receiving and wellcoming visitors, providing instructions in a clear and precise manner</li> <li>- Development of heritage interpretation which is enjoyable, organised, thematic and clear in message.</li> <li>- Interpret rural heritage and other cultural resources of the regional and local environment in itineraries, routes or visits, adapting to different contexts and profiles of types of groups or individual.</li> <li>- Guarantee the correct execution of the activity/service, creating opportunities for interpretation.</li> <li>- Support any other tourist or educational activity</li> <li>- Safely guide the group during the activity, preventing and solving conflicts.</li> </ul>
SUPPLY VISITORS AND OTHER TARGET GROUPS WITH INFORMATION AND INTERPRETATION MATERIAL	<ul style="list-style-type: none"> <li>- Setting up information, interpretation and promotional spaces</li> <li>- Supply interpretation information through different media</li> <li>- Supply visitors with interpretative and promotional materials</li> <li>- Information about local or regional rural places, events, etc</li> <li>- Cheking stocks of materials and exchanging them between tourist, information or other centres</li> </ul>
ASSESSMENT	<ul style="list-style-type: none"> <li>- Surveys and interviews participants</li> <li>- Evaluation of the activity</li> </ul>
<b>5. Administration and Communication</b>	
ADMINISTRATION & STATISTICAL AND ANALITICAL WORK	<ul style="list-style-type: none"> <li>- Arrangement of archive</li> <li>- Preparing and managing records</li> <li>- Collecting and monitoring data on visitors</li> <li>- Preparing statistical data</li> <li>- Formulating and producing summaries and oral-written reports</li> <li>- Advising visitors when deciding on rural products or services</li> <li>- Financial managment</li> </ul>
COMMUNICATION WITH VISITORS AND TOURIST AND CULTURAL ORGANIZATIONS IN A BROAD SENSE	<ul style="list-style-type: none"> <li>- Providing information and instructions in a clear and precise manner</li> <li>- Handeling complaints and commendations</li> <li>- Giving clear and accurate information and contacting people</li> <li>- Maintaining connections with the sources of information and institutions</li> </ul>
<b>6. Protection of health and environment/ Quality control</b>	
QUALITY ASSURANCE	<ul style="list-style-type: none"> <li>- Assuring quality of work</li> <li>- Working according the Ethical Code in tourism</li> <li>- Following regulations on safety and health at work</li> </ul>



### 2.1.5. Professional field

#### Professional environment

The rural heritage guide-interpreter carries out his/her professional activity in the area of tourism (as a form of sustainable rural development) dedicated to the interpretation of rural heritage and the accompaniment of tourists; in public or private entities, regardless of the size of the company, either on his/her own account or as an employee, regardless of its legal form. They carry out their activity depending, where appropriate, functionally and/or hierarchically on a superior. Their professional activity is subject to regulation by the competent administration. In the development of the professional activity, the principles of universal accessibility and universal design or design for all persons are applied in accordance with the legal regulations.

#### Productive sectors

It is included in the productive sector of tourism, specifically in accompanying and interpretation services for tourists during the promotion of rural cultural and natural heritage.

### 2.1.6. Relevant jobs

The most relevant occupations and jobs are the following:

- Guide-interpreter of rural heritage.
- Accompanying people and visiting groups.
- Assistant on rural heritage conservation and rural promotion.
- Support of environmental awareness programs.
- Local representative of a touristic agency or other mediator.
- Tourist group assistant in rural accommodation or other rural tourist services.

### 2.1.7. Working conditions

#### Means and equipment of production and work

- Flexible working hours
- Working outdoors and indoors
- Information desk with equipment
- Information technologies
- Office resources and equipment (PC, audio-visual equipment, electronic media, telephone, photocopying machine, etc.)
- Information promotional material
- Means of transport
- Cultural facilities and installations, interpretation centres, rural buildings for different uses and facilities in natural, cultural and tourist spaces in rural areas
- Reproductions and representations of heritage elements

#### Products, services and results

- Interpretative, relevant materials and information on heritage and other rural tourism resources,



- Interpretation, guidance, assistance and accompaniment services. Development of the itinerary, route, visit or service managed and supervised. Reception, accompaniment, assistance and guidance of individual and group tourists.

#### Materials and information used and produced

- All types of information, documentation and interpretative materials in printed, physical, ICT and online formats, on cultural and natural heritage and other rural tourism resources and services.
- Demonstrations, summaries, reposts, etc.
- General and specific bibliography. Plans and maps. Legislation on tourism, on the conservation of cultural and natural heritage and on sustainable rural development.
- Documents derived from the management of the visit or itinerary.
- First aid manuals.
- Action protocols and assistance and statistical reports.

#### *2.1.8. Transversal competences (and personal characteristics)*

- Polite and respectful conduct
- Communication abilities
- Tolerance, patience and adaptability
- Creativity
- Kindness, friendliness
- Empathy and emotional intelligence
- Persuasiveness, self-confidence
- Self-independence
- Reliability
- Sense of responsibility
- Involvement in rural environment
- Psychological and pedagogical abilities
- Charismatic
- Intuition
- Conflict management skills.
- Group management techniques
- Leadership
- Ability of risk management
- Ability of conflict management



## 2.2. DESCRIPTION OF THE COMPETENCE UNITS

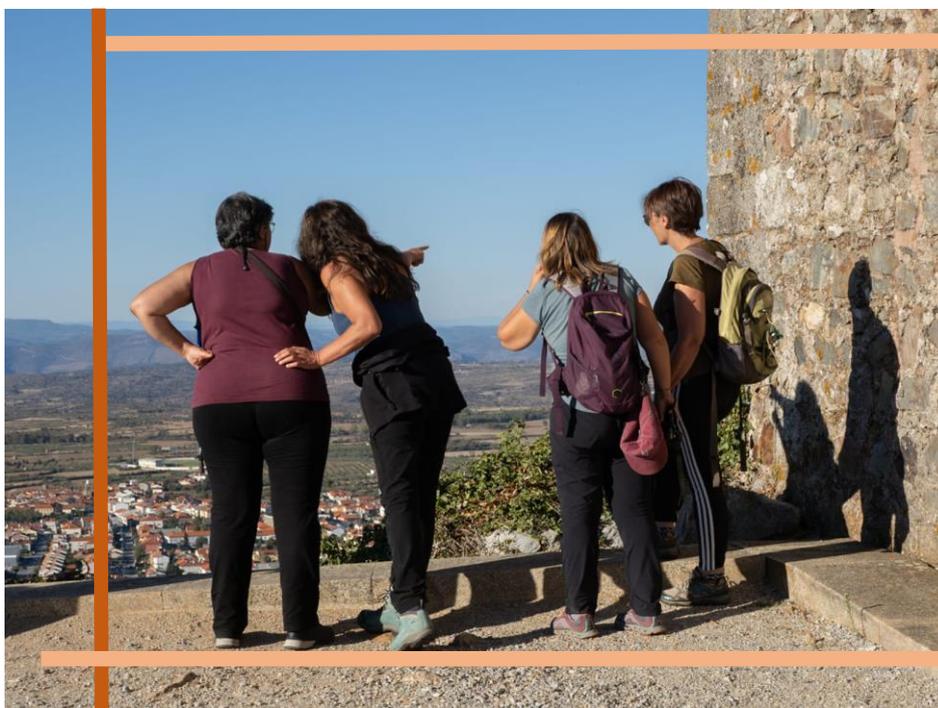
### 2.2.1. COMPETENCE UNIT 1 (CU1): Design and development of interpretation activities on rural heritage

#### 2.2.1.1. Introduction

Heritage interpretation is a strategic communication technique that, through comprehensible and attractive messages, seeks to connect the visiting public with the heritage resource to be known, in this case with the rural heritage (cultural and natural, tangible and intangible).

The purpose of interpretation is to reveal the meaning of a place or heritage element, in a relaxed and enjoyable atmosphere, in order to awaken a response of appreciation and commitment with conservation from visitors. It can also be described as the "art" of communicating heritage values *in situ* to non-specialist visitors and heterogeneous groups who visit the place in their leisure time.

14



Even though it was born as a method of intervention with the visiting public in Protected Natural Spaces, it has been extended to the field of tourism, offering the attraction of bringing the public closer to a place in a different way. Therefore, it can also be used in heritage management and conservation and in rural development, bringing the local population into contact with visitors through strategies in which both become protagonists.

There are three basic components that include all the different skills and competences that define the work of interpreters and which they should be able to apply with ability in order to create interpretation opportunities: competence in the knowledge of the audience, competence in the use of the interpretation techniques as well as the competence in the knowledge of the resource.

This competence unit includes the essential knowledge, skills, abilities and behaviours that are necessary to reach and the professional standards and training contents in these three basis components that interpreter must possess.



### 2.2.1.2. Objectives

The training of the interpreter of rural heritage will provide him the knowledge, skills and abilities necessary to:

- \* Contribute to revalue rural cultural heritage by turning it into a resource for the enjoyment of the population and using it as a tourist resource.
- \* Design and develop heritage interpretation activities using the possibilities of the rural areas.
- \* Master the procedures for the analysis of heritage resources, the identification of elements with interpretive potential and the process for their communication-interpretation to the visiting public through different interpretative products, services and activities or interpretative media.
- \* Use the different communication techniques, means and supports for the interpretation of heritage as a tool to create pleasant experiences for visitors and facilitate a connection between the interest of visitors and the meanings of the rural heritage, in general or its concrete aspects.
- \* Raise awareness of the importance of interpretation to improve and prevent the loss of rural heritage and to promote attitudes in favor to the conservation of the specific place and the rural heritage in general.

### 2.2.1.3. Teaching-learning hours

75 hours

### 2.2.1.4. List of learning outcomes (= final abilities)

#### 1. Analysis of information and identification of rural heritage resources with potential interest

##### KNOWLEDGE:

- Understand the meaning of heritage interpretation, its context, the environments for its application, and its potential as an instrument of communication and management and conservation in rural areas.
- Discover how the rural heritage can contribute to the sustainable economy through the activities of interpretation
- Have an updated knowledge of the heritage resources, as well as the documentary and oral sources and understand the importance of in-depth research and knowledge of the resource.
- Know the procedures for the analysis of heritage resources, the identification of elements/features with Interpretive potential, and the determination of the meanings of the resource.

##### SKILLS:

- Ability to investigate and evaluate the reliability and validity of sources of information.



## ATTITUDES:

- Conviction that the work of interpreting rural heritage contributes to improving rural heritage and promoting attitudes favorable to its conservation as well as improving the quality of life of the local population.

## **2) Design interpretive products and tourist activities or services in relation to rural heritage**

### KNOWLEDGE:

- Know the means and supports for interpretation, as well as the criteria for the selection of interpretive means.

### SKILLS:

- Be able to apply the interpretive process model to design interpretive products or services
- Analysis skills in order to define the elements with the greatest interpretive potential in the working area or territory.
- Be able to identify the target group
- Ability to identify the key idea of the place, its essence, or “the spirit of the place”, and to transform it into a message or idea around which an interpretive product orbits.
- Skills in selecting and deciding the opportunity to use various interpretive media, including their own intervention as an interpreter guide and interpretive planning.
- Ability to design interpretive itineraries, panels, signs, etc.
- Identify, understand and evaluate quality factors, indicators and standards.

### ATTITUDES:

- Positivism towards the enhancement and conservation of rural heritage.
- Respect towards traditional cultural values and rural heritage.

## **3. Planning/Organizing**

### KNOWLEDGE:

- Know the procedures for interpretive planning, and know how to develop an interpretation plan.
- know how to organize interpretative and guiding tour activities for different target groups according to timeline framework in a field of cultural and natural heritage and cooperation with other stakeholders in accordance with the local regulations.
- Know how to organize transport logistic and safety assurance
- Know how to manage financial activities

### SKILLS:

- Ability to prepare a work plan for the interpretation and plan the organizational activities (logistical, financial, security, etc.)
- Ability to organize different activities regarding interpretative topics, target groups.
- Ability to organize logistic activities regarding time framework, transport, and safety measures.



- Ability to manage financial activities and services (pricing of the service including calculation of costs, taxes, contributions and other charges) and take into account the concept of sustainable development
- Capacity to plan and organize different activities regarding to content, timeline framework, target groups, and other actors including different working methods and approaches and safety measures.
- Capacity to manage financial aspects of planned event in the context of rural heritage interpretation

#### **4) Management and implementation of interpretation activities, services or itineraries.**

17

##### KNOWLEDGE:

- Know the interpretive techniques as well as the criteria for the selection of the more adequate ones.

##### SKILLS:

- Ability to analyze the different types of audiences and to apply the essential methodology of interpretation and interpretive techniques to adapt the messages to different types of publics.
- Ability to generate opportunities for interpretation and carry out the interpretive process.
- Ability to develop powerful (effective) and creative (entertaining) interpretive messages that “connect” the visitor's interests with the inherent meanings of the resource.
- Skills to execute a variety of interpretative techniques in interpretative programmes, in media development and implementation, and in informal contacts.
- Ability to evaluate the effectiveness of interpretation, both in the transmission and assimilation of the interpretive message, as well as its impact.

##### ATTITUDES:

- Sensitivity to the needs, beliefs and values of both the target audience and the local population.
- Empathy with visitors



## 2.2.1.5. Evaluation criteria

Field of work (Scope of evaluation)	Evaluation criteria Skills and knowledge areas to be verified	METHODS	POINTS
<b>1. Analysis of information and identification of rural heritage resources</b>	<ul style="list-style-type: none"> <li>- Understand the concept of heritage interpretation and its main characteristics and list possible environments for its application.</li> <li>- Give examples of the potential use of HI as an instrument for heritage conservation and rural development.</li> <li>- Propose ideas on the use of rural heritage as a tourist resource through the interpretation.</li> <li>- Know the heritage values in rural areas with examples.</li> <li>- Debate and give positions for or against the use of Interpretation for the conservation of rural heritage as well as for the improvement of the life of the local population.</li> <li>- Explain the importance of traditional values and their conservation.</li> <li>- Investigate about resources using several information sources.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Active implementation</li> </ul>	20
<b>2. Design interpretative products, activities and services in relation to rural heritage</b>	<ul style="list-style-type: none"> <li>- Use the interpretive model and determine the main meanings to highlight around each interpretive feature.</li> <li>- Describe the main aspects to take into account when preparing an interpretation plan.</li> <li>- List and describe the different means and interpretive supports.</li> <li>- Create messages around certain tangible and intangible heritage resources for different target groups.</li> <li>- Identify natural and cultural elements/features with interpretive potential in specific cases.</li> <li>- Identify what could be the “essence or spirit” of a specific place around which to structure heritage interpretation activities.</li> <li>- Design interpretive panels about specific practical cases, around places or heritage resources</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Active implementation</li> </ul>	30
<b>3. Planning, organising and administration</b>	<ul style="list-style-type: none"> <li>- Prepare a work plan for the interpretation.</li> <li>- Identify the main characteristic of target groups.</li> <li>- Plan the organisational activities (logistical, financial, security, etc.) for the implementation of rural heritage interpretation.</li> <li>- Define a financial management plan (pricing of the service including calculation of costs, taxes, contributions and other charges) and take into account the concept of sustainable development.</li> <li>- Collect and monitor the data about the visitors, prepare forms to collect statistical data and make analytical work</li> <li>- Formulate and produce summaries and oral-written reports.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Active implementation</li> </ul>	20
<b>4. Implementation of interpretation activities, services or itineraries.</b>	<ul style="list-style-type: none"> <li>- Identify the suitability of a particular technique in relation to the resource, location, environmental circumstances and audience.</li> <li>- Decide the best interpretive means to use in different situations. Implement working tasks.</li> <li>- Develop interpretation activities in an effective, creative and entertaining way, using communication techniques and comprehensible attractive messages creating pleasant experiences.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Orally</li> <li>- Active implementation</li> </ul>	30
<b>Total points</b>			<b>100</b>
<b>Pass criteria: 60 points</b>			



### 2.2.1.6. Contents

1. Rural areas and its heritage as an environment for the application of Heritage Interpretation. Heritage interpretation as an instrument for:
  - Sustainable economic development through tourism.
  - Management and conservation of rural heritage.
2. What is a heritage interpreter?
  - Definition and context of heritage interpretation. Phases in interpretation (documentation and scientific interpretation, translation, and final interpretation in the public mind). Origin and evolution of heritage interpretation.
  - Essential characteristics of heritage interpretation: enjoyable, relevant, organized, thematic or clear in message.
3. Rural heritage resources.
  - Selection of rural heritage resources with significance and relevance.
  - Types of resources:
    - \* Cultural heritage resources (ethnographic heritage, traditional architecture, traditional buildings, archaeological, historical, artistic and cultural heritage, traditions and festivals, museums, etc.).
    - \* Natural heritage resources (natural spaces, landscapes, etc.).
    - \* General resources: geographical, productive, historical, economic and cultural context.
4. Target audience for interpretation:
  - General and non-captive public (tourists, visitors).
  - Basic methodological tools for the analysis of visitors (actual and potential).
5. Search, selection and processing of information on heritage resources:
  - Sources of information: identification, discrimination, contrast and selection.
  - Supports and means of access to information on rural heritage.
  - Organization, processing and updating of information. Adapting information according to the type of audience.
6. Methodology and techniques of interpretation as a set of communication techniques:
  - Creating connections between the visitor and the resource.
  - Interpretive techniques for tailoring messages to different audiences and creating opportunities for interpretation.
7. Procedures for the development of interpretation products:
  - Analysis of the heritage resource (natural or cultural).
  - Identification of features with interpretive potential
  - Determination of the meanings of the resource.
  - Creation of powerful (effective) and creative (enjoyable) interpretive messages that "connect" the visitors with the inherent meanings of the rural heritage resources.
  - Means and media for interpretation (personal and non-personal). Criteria for the selection of interpretive media.
8. Planning heritage interpretation. Elaboration of interpretation plans and design of interpretative activities. Control of time available for the activity.



## 2.2.2. COMPETENCE UNIT 2 (CU2): Guide-interpreter of tangible & intangible rural cultural heritage

### 2.2.2.1. Introduction

The European rural landscape, whether natural, landscape or/and architectural, can perfectly well be understood as a historical object of a wide and varied spectrum, which has been shaped over the centuries. **Intangible heritage and tangible heritage expressions go hand in hand and one cannot be understood without the other, they are parallel and, most of the time, interconnected.**



The rural world possesses a rich cultural heritage which, fortunately, in recent decades has been enhanced and its infinite richness has been taken into account. All the elements that make it up have become an essential driving force for development, giving meaning to the evolution of our societies as a whole and not only of the rural one.

Both tangible and intangible rural cultural heritage (popular architecture, historical centres, religious buildings, civil constructions, archaeological sites, traditions, festivities, traditional knowledges, etc.) have protection instruments at local, national, European and even at world level. We need professionals who, referring to the rural environment, have a deep knowledge of it and contribute to their interpretation under an innovative and specific approach for the rural environment, since its cultural idiosyncrasy remains invariable in a much more evident way than in urban environments.

Understanding a material cultural resource implies much more than a technical transmission based on data; this innovative and differentiating approach is given when, in addition to the above, we introduce the philosophy of life, the local language or the oral tradition, to interpret this tangible heritage element.

Heritage interpretation is a strategic communication technique that, through comprehensible and attractive messages, seeks to connect the visiting public with the heritage resource to be known, in this case with the rural heritage (cultural and natural, tangible and intangible).



### 2.2.2.2. Objectives

Interpretation is a tool to be developed by the professional in order to bring the visitor or tourist closer, from a sentimental and even spiritual perspective, to the heritage they are observing.

To do this, a code must be used that is understandable to visitors, allowing them to connect with the heritage and the environment, as well as to experience and understand what they are seeing. This is why the function or task of interpretation involves much more than the simple knowledge and facts transmission, since one of the main objectives is to provoke perceptions that lead to new sensations and even to reflect on hidden sensations that an inexperienced visitor would not be aware of feeling.

The main objective expected from the task of interpreting rural cultural heritage is that the interpreter is able to generate new sensations or bring out those sensations that are still hidden in the visitor when he/she is in front of the tangible heritage element.

The training of the guide-interpreter of tangible and intangible rural heritage will provide him the knowledge, skills and abilities necessary to:

1. Clearly relate the shown heritage element to the most intimate and personal aspects of the visitor through techniques that enable the interpreter to perceive aspects of the visitor's personality and use this knowledge to provoke emotions.
2. Have a good knowledge of the tangible and intangible rural heritage but not be tempted to offer simply information to the visitors (the interpreter must be convinced that the act of interpreting does not consist of simply providing information).
3. Conceive interpreting cultural heritage as one more, but very important, resource in the promotion of the place or territory in which he or she is located and of the presented object.
4. Generate provocative sensations in such a way as to stir the visitor's mind. This will give added value to the interpretation action and the visitor will understand it as a differentiating added value.
5. Recognize the cultural resource from a general perspective, knowing how to combine cultural and personality aspects of the population, of the natural landscape and, obviously, of the tangible cultural element itself.
6. Carry out researching work about the territory itself, knowing its population, its history, its traditions, including the oral ones, its language and particular way to talk, etc.
7. Adapt to the audience, knowing the visiting public (their social group, cultural level, geographical origin and even the age) which will allow him/her to adapt the discourse and ensure that the main objective is achieved.
8. Check any formalities to be fulfilled and authorizations to be requested, preparing the activity, plan and supporting materials.

### 2.2.2.3. Teaching-learning hours

150 hours (75 hours corresponding to tangible heritage and 75 hours to intangible)



#### 2.2.2.4. List of learning outcomes (= final abilities)

Knowledge, skills and attitudes to be achieved, divided in different scopes of work:

### 1. Identification and analyses of tangible rural heritage resources with potential interest

#### KNOWLEDGE:

- Understand that the development and implementation of interpretation activities of tangible heritage should be an integral part of an overall plan for rural heritage management.
- Understand the interpretation work on a tangible rural heritage resource as an ongoing effort in terms of research and training on that resource.
- Be familiar with the characteristics and importance of the individual units of the cultural heritage and the need to raise awareness and to preserve and transmit the rural cultural tradition.
- Have an updated knowledge of the rural heritage resources (popular architecture, historical centres, religious buildings, civil constructions, industrial heritage, archaeological sites, traditions, festivities, popular knowledge, etc.)
- Know the documentary and oral sources of information and understand the importance of in-depth research and knowledge of the resource.
- Know the procedures for the analysis of heritage resources, the identification of tangible/intangible elements/features with interpretive potential, and the determination of the meanings of the resource.

22

#### SKILLS:

- Ability to investigate and evaluate the reliability and validity of sources of information.
- Capacity to use the local oral tradition in the interpretive work and combine it with scientific information in a specific manner that may cause impact in the visitors.
- Ability to relate the different cultural elements found in the territory, as well as its tradition and intangible heritage.
- Ability to identify and analyze selected heritage units and tradition holders.

#### ATTITUDES:

- Conviction that the work of interpreting tangible rural heritage contributes to improving rural heritage and promoting attitudes favourable to its conservation as well as improving the quality of life of the local population.
- Proactivity in looking for new information about the tangible heritage resource, using as well the oral tradition as a source of information and taking into account the information provided by the oldest local population.
- Ability to blend in with the local population by understanding and empathising with them.

### 2) Design interpretive products and tourist activities or services in relation to tangible rural heritage

#### KNOWLEDGE:

- Know the characteristics of the territory in order to design an interpretative activity in a manner appropriate to the facilities, resources, means and physical characteristics of the territory itself.



- Have a wide knowledge of different cultural activities planned in the territory that may complement the interpretive activities.
- Know how to develop evaluation methods and techniques, with specific procedures to the visitors' specificities and to the element interpreted.

#### SKILLS:

- Skills to define the tangible elements with the greatest interpretive potential in the working rural territory.
- Ability to identify the key idea of the place or the essence around tangible heritage elements, and transform it into the main message or idea for interpretive product.
- Capacity to enhance the visitor experience, respect and public understanding of the significance of the cultural heritage site, its values and the importance of its conservation.
- Skills in selecting and deciding the opportunity to use various interpretive media, including their own intervention as an interpreter guide
- Ability to design interpretive itineraries, panels, signs, etc. and combine them with other public or private resources.
- Ability to interpret the evaluation conclusions done by the visitors.

23

#### ATTITUDES:

- Positivism towards the enhancement and conservation of the different types of tangible rural heritage.
- Respect towards traditional cultural values and tangible rural heritage.
- Empathy with visitors
- Positive attitude about the evaluation conclusions both the interpretive activity and the heritage resource.
- Propose and promote infrastructures that are proportional and in keeping with the resource on which the interpretation activity is carried out. Out-of-context infrastructures lead to poor or inadequate interpretation.

### **3. Planning/Organizing**

#### KNOWLEDGE:

- Understand the importance of proper planning interpretation activities
- Know the procedures for interpretive planning and know how to develop an interpretation plan.
- Knowledge of the basics of work organization at the level of timing, logistics, finance, marketing, promotion.
- Know how to purpose other cultural activities or cultural events, to both public and private entities, that may contribute to the territory development and cultural heritage promotion.
- Know how to organize different tour activities, for different target groups, according to timeline framework and cooperation with other stakeholders in accordance with the local regulations
- Know how to organize transport logistic and safety assurance.
- Know how to manage financial activities.

#### SKILLS:

- Ability to manage financial activities and services.
- Ability to combine the interpretive itineraries and/or routes with other local cultural activities.



- Capacity to consider the potential impact of visitor numbers on the cultural value, physical characteristics, integrity and natural environment of the site should be fully considered.
- Capacity to plan and organize different activities regarding the timeline framework, target groups, and other actors including different working methods and approaches and safety measures.
- Capacity to manage financial aspects of planned events in the context of rural heritage interpretation.
- Capacity to adapt to last moment changes.

#### **4) Management and implementation of interpretation activities, services or itineraries.**

##### KNOWLEDGE:

- Conceive rural heritage interpretation as a right, in which the multitude of stakeholders should participate.
- Know the interpretive techniques as well as the criteria for the selection of the more adequate ones.

##### SKILLS:

- Ability to identify the particularities of visitors, being able to classify them culturally and demographically.
- Ability to adapt to the characteristics of visitors by offering alternative routes to the usual or standard ones, so that the emotional or sensitive impact on visitor is greater and at the same time the impact on the terrain, physical area or heritage element would be less.
- Ability to develop effective and entertaining messages that “connect” the visitor's interests with the resource.
- Be proficient in a variety of communication skills for different stakeholder interaction needs
- Capacity to clearly and interestingly interpret the rural cultural heritage and communicate with other stakeholders
- Skills to execute a variety of interpretative techniques in interpretative programmes, in media development and implementation, and in informal contacts.
- Correctly provide high quality (including raising awareness of the importance of preserving cultural heritage) interpretive guided tours at a selected location for different target groups.
- Ability to evaluate the effectiveness of interpretation, both in the transmission and assimilation of the interpretive message, as well as its impact.
- Capacity to adapt to last moment changes.

##### ATTITUDES:

- Proactivity in deciding on different specific interpretation circulation routes in order to minimise impacts on the physical integrity of the site or to dynamize other lesser-known spaces.
- Sensitivity to the needs, beliefs and values of both the target audience and the local population.
- Empathy with visitors
- Engagement in guaranteeing an interpretation service in accordance with all audiences and sensibilities.
- Convinced that the task of interpretation of the tangible rural heritage is as one of the first steps to contribute to the heritage safeguarding.



- Empathy, from a cultural point of view, with the environment, both with its population and with its cultural heritage.
- 

### 2.2.2.5. Evaluation criteria

Fields of work (Scopes of evaluation)	Evaluation criteria Skills and knowledge areas to be verified	METHODS	POINTS
<b>1. Analysis of information and identification of tangible/intangible cultural heritage resources</b>	<ul style="list-style-type: none"> <li>- Updating information about the interpretive resource and selection the accurate information sources on cultural rural heritage.</li> <li>- Use the oral tradition knowledge in the interpretive actions.</li> <li>- Search, selection and processing information on heritage resources.</li> <li>- Organisation and processing information.</li> <li>- Identification of new interpretive examples form the point of view of tourism and heritage conservation.</li> <li>- Analyse the tradition and intangible traditions connected with the tangible heritage resource.</li> <li>- Use the demographic and age data to adapt the interpretive activities to the visitors' particularities.</li> <li>- Adapt information according to the type of audience.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Active implementation</li> </ul>	20
<b>2. Design interpretative products and tourist activities or services in relation to cultural rural heritage</b>	<ul style="list-style-type: none"> <li>- Creation of effective, creative and enjoyable interpretative messages adapted to the target groups.</li> <li>- Selection of interpretative means and media to "connect" the visitors with the rural heritage.</li> <li>- Take into consideration the conclusions when evaluate the interpretive activities.</li> <li>- Selection of different interpretive techniques adapted to the special visitors' needs.</li> <li>- Design of interpretative tourist activities or itineraries to reduce the impact on the rural heritage resource.</li> <li>- Design and presentation of multimedia content and knowledge of contemporary approaches, including the ICT tools.</li> <li>- Consider the heritage interpretation as the first step for the sustainable economic development and the rural heritage conservation.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Active implementation</li> </ul>	30
<b>3. Planning, organizing and administrative work</b>	<ul style="list-style-type: none"> <li>- Interact with the holders of the tradition and use various sources of information in the preparation of a plan for cultural heritage interpretation.</li> <li>- Plan organizational activities (time scheduling, logistical and financial, security, etc.)</li> <li>- Adapt the interpretive activities with other local activities related to the rural heritage.</li> <li>- Collect and monitor the data about the visitors, prepare forms to collect statistical data and make analytical work</li> <li>- Formulate and produce summaries and oral-written reports.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Active implementation</li> </ul>	20

25



<b>4. Implementation of activities, services or itineraries in a safe way.</b>	<ul style="list-style-type: none"> <li>- Provide instructions in a clear way having in consideration the visitors' profiles.</li> <li>- Interpret the tangible rural heritage by adapting to different contexts and visitors' profiles.</li> <li>- Support any other tourist or educational activity.</li> <li>- Supply interpretation information through different media and promotional materials.</li> <li>- Collect information about regional rural places and other cultural events.</li> <li>- Know regulations on safety and health at work and environmental protection</li> <li>- Draw conclusions of surveys for evaluating an activity.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Orally</li> <li>- Active implementation</li> </ul>	30
<b>TOTAL points 100</b>			
<b>Pass criteria: 60 points</b>			

### 2.2.2.6. Contents

1. The tangible and intangible rural cultural heritage as basic local elements for:
  - Sustainable economic development through tourism.
  - Management and conservation of rural heritage.
  - General awareness about the importance of tangible rural heritage.
2. In what consist the tangible rural heritage interpretation?
  - The three fundamental pillars of Heritage Interpretation: knowledge of the resource, knowledge of the audience and interpretation techniques.
  - Importance of the knowledge of the resource: the tangible and intangible heritage
  - Creating connections between the visitor and the resource.
  - Interpretive techniques using tailored messages to different audiences.
3. Tangible cultural rural heritage resources.
  - Definition and context of the tangible cultural heritage
  - Essential characteristics of tangible rural heritage.
  - Selection of rural heritage resources with significance and relevance.
  - Types of resources:
    - \* Archaeological and monumental heritage in rural areas (Buildings, monuments, bridges, castles, churches, hermitages, archaeological sites, historical ensembles, etc.)
    - \* Popular architecture (villages, houses, cellars, pigeon lofts, farms, etc.) and traditional handicrafts.
    - \* Ethnographic museums
    - \* Industrial heritage in rural areas (mining, warehouses, old factories, mill etc.)
  - Examples of European tangible rural heritage.



#### 4. Intangible cultural rural heritage resources.

- Definition and context of the intangible cultural heritage
- Essential characteristics of intangible rural heritage.
- Selection of rural heritage resources with significance and relevance.
- Types of resources:
  - \* Traditions, customs and social uses.
  - \* Rituals and festive acts.
  - \* Dances and traditional music. Singing traditions.
  - \* Traditional games and sports
  - \* Oral expressions and languages
  - \* Legends, stories, myths, etc.
  - \* Knowledge and uses related to nature and universe.
- Examples of European intangible rural heritage.

#### 5. Levels of protection of tangible/intangible cultural heritage:

- UNESCO World Heritage Sites
- European, national, regional and local

#### 6. Search, selection and processing of information on heritage resources:

- Sources of information: identification, discrimination, contrast and selection.
- Support and means of access to information on tangible rural heritage.
- Organization, processing and updating of information. Adapting information according to the type of audience.

#### 7. Development of interpretation products:

- Analysis of the potential tangible rural heritage resources.
- Creation of powerful (effective) and creative (enjoyable) interpretative messages that "connect" the visitors with the inherent meanings of the rural heritage resources.
- Means and media for interpretation (personal and non-personal). Criteria for the selection of interpretive media.
- Evaluation of interpretive programs and services



## 2.2.3. COMPETENCE UNIT 3 (CU3): Guide-interpreter of Natural Heritage and Cultural Landscapes.

### 2.2.3.1. Introduction

The Guide Interpreter of Natural Heritage and Cultural Landscape is a professional figure in the tourism sector who is in charge of presenting to visitors the essential natural characteristics of the area and its main related elements of cultural interest, revealing the meaning of a specific territory, landscape or element, in a relaxed and enjoyable atmosphere. The guide accompanies individuals or groups on visits to areas of environmental interest, illustrating their natural, anthropic, cultural and landscape aspects and peculiarities. Guides carry out their activities in protected and unprotected areas, and their main tasks range from accompanying people in nature, to interpreting the place, to disseminating information, to carrying out environmental and cultural education activities. More specifically, a Guide Interpreter of Natural Heritage and Cultural Landscapes is someone who, as part of their professional activity, safely accompanies individuals or groups to explore and know both natural and man-made environments on foot or by other means of transport, providing the necessary technical assistance and carrying out heritage interpretation (environmental, cultural or landscape interpretation).

28



The professional activity includes identifying, describing and interpreting the environmental, natural, anthropological and cultural aspects of a given territory with naturalistic, eco-environmental, ethnological, heritage and/or landscape peculiarities. The final objective is to make visitors discover the natural elements and characteristics, ecological relationships, historical and cultural aspects,

traditions and landscape attractiveness of a territory, and to provide elements of sustainability and environmental and cultural education.

The work of the Natural Heritage and Cultural Landscapes interpreter focuses in a special way on the interpretation of the landscapes, where the interrelations between the two aspects, natural and cultural or man-made, can be clearly appreciated, as well as the way in which people have modified the landscape, creating the so-called "cultural landscapes".

The guide has an in-depth knowledge of their area with particular reference to its natural and cultural aspects in order to identify and prepare itineraries of interest to visitors.

The Guide Interpreter seeks to combine the cultural attractiveness of an area with the natural attractiveness, offering interpretative paths aimed at deepening knowledge of the local identity from both the cultural and naturalistic points of view.



### 2.2.3.2. Objectives

The training of the guide-interpreter of natural heritage and cultural landscape will provide him the knowledge, skills and abilities necessary to:

- Contribute to the appreciation and conservation of a territory, with special focus on its natural elements or characteristics.
- Design and develop heritage interpretation activities and itineraries of natural and cultural interest, identifying the place or the route on the basis of the territorial characteristics and its heritage, as well as the visitors' needs.
- Accompany visitors on excursions, providing the necessary assistance to individuals and groups and illustrating the natural and cultural aspects of the territory.
- Checking any formalities to be fulfilled and authorisations to be requested, preparing the programme and the supporting materials.
- Increase the knowledge and awareness of visitors by interpreting the natural and cultural characteristics of the territory to them.
- Contribute to the development of a territory by attracting more visitors curious to know more about its natural and cultural aspects.
- Interpreting the landscape, where the interrelations between natural and cultural or man-made aspects can be appreciated, as well as the way in which people have modified the landscape, creating the so-called "cultural landscapes".

### 2.2.3.3. Teaching-learning hours

75 hours

### 2.2.3.4. List of learning outcomes (=Final abilities)

Knowledge, skills and attitudes to be achieved, divided in different scopes of work:

#### 1. Identify and analyse naturalistic and landscape attractions.

##### KNOWLEDGE

- Knowing how to analyze and identify the main elements of the Natural Heritage and Cultural Landscapes of a territory.
- Knowledge about Natural Parks, Nature Reserves, Geosites and other protected natural areas, landscape plans and strategies for biodiversity conservation.
- Understand the signs in the landscape of natural processes and also of the modification of the landscape due to human activities

##### SKILLS

- Identify the key elements/characteristics of a place.
- Identify the heritage attractions of a territory that can be correlated with natural and environmental paths, in order to deepen the knowledge of elements of local identity not only from the naturalistic point of view but also historical and cultural.
- Identify the key elements/characteristics of a place and be able to communicate them.
- Analyze and describe the natural heritage and cultural landscapes of a territory.



- Research and analysis skills in reference to the natural heritage and landscapes of a territory.
- Know and analyze the natural context of a territory.
- Be able to interpret the landscape as result of natural and man-made processes.

### ATTITUDES

- Be convicted of the value of interpretation for territory valorisation.

## **2. Design interpretative activities/services in relation to natural heritage and landscape.**

### KNOWLEDGE

- Know the basis of interpretation, with special focus on natural heritage and landscape.
- Know the organizational techniques and methodologies for tourist trails.
- Know the theories and tourist techniques for drafting an itinerary and planning excursions.
- Understand the value and potential of interpretation in relation to the development of a territory.

30

### SKILLS

- Analysis skills in order to identify and define the elements with the greatest interpretive potential and the essence of a natural territory or place
- Ability to create a message or idea around which the activity or itinerary will orbit.
- Ability to design interpretive itineraries or activities including the processes and services needed to deliver them.
- Analyze support activities and use tools and methodologies for risk management.
- Be able to understand and speak to different targets with different needs and expectations.
- Identify, understand and evaluate quality factors, indicators and standards.

### ATTITUDES

- Attention and sensitivity to the needs of the target (visitors) and local population.

## **3. Plan, organize and manage a guide activity/service.**

### KNOWLEDGE

- Know the principles of planning activities in relation to nature and cultural interpretation of a territory.
- know how to plan, organize and monitor activities for different target groups according to timeline framework in a field of natural heritage
- know how to organize transport logistic if necessary and safety assurance
- Know how to manage financial activities
- Know the logistic resources: equipment and work environment.



## SKILLS

- Planning and monitoring of the activity.
- Planning capacity of tourist trails based on the type of users of the service.
- Knowing how to check the feasibility of the activity.
- Ability to identify equipment and materials and assess their adequacy.
- Select and apply control indicators for the quality of tourist activities.

## ATTITUDES

- Proactivity in the development of new projects or participation in already existing projects related to natural/cultural interpretation.

## **4. Correct execution of the interpretative activity/service and safely guide the group**

### KNOWLEDGE

- Know the principles of executing successful activities in relation to nature and landscape interpretation of a territory.
- Know how to use organizational techniques and methodologies for tourist trails.
- Know the landscape interpretation techniques.
- Production and provision of the service.
- Understand the cartography, topography and orientation techniques.
- Know the hiking theories and techniques.
- Have some notions of Botany, Zoology, Ecology, Biodiversity, Environmental protection and Anthropogenic Geography of the reference territory and of meteorology and climate (aimed at understanding potentially dangerous situations and safety measures).

### SKILLS

- Be able to use different interpretative tools and methodologies (digital, physical etc.) to positively engage with people.
- Development of the interpretative activity, users' assistance and management of any unforeseen events.
- Ability to rationally adapt and modify the activity on the basis of unforeseen events.
- Ability to use cartography, topography and orientation.
- Ability to meet deadlines and schedules
- Management of tools and methodologies for risk management, visitors' safety and relationship and conflict management.
- Ability to communicate in relation to the different characteristics, types and expectations of visitors.
- Ability to lead the group even in the event of unforeseen events.
- Ability to evaluate the psychophysical abilities of users and manage risk according to the type of visitors and to the context.
- Ability to organize rescue with competent and available services on the territory.



## 2.2.3.5. Evaluation criteria

Fields of work (Scopes of evaluation)	Evaluation criteria Skills and knowledge areas to be verified	METHODS	POINTS
<b>1. Analyse and Identify resources/ Design interpretative activities of natural heritage and landscapes</b>	<ul style="list-style-type: none"> <li>- Identify the main cultural and natural elements of a territory to be potentially included in future interpretive activities.</li> <li>- Map natural/cultural attractions/activities of a territory and identify and describe their main characteristics.</li> <li>- Present a list of possible activities/actions to implement in the future related to natural/cultural interpretation.</li> <li>- Propose a route that includes natural and cultural attractions/activities of a territory.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Active implementation</li> </ul>	40
<b>2. Planning, organizing and administration</b>	<ul style="list-style-type: none"> <li>- Explain how different stakeholders of a territory interact and how they can successfully work in a network.</li> <li>- Develop an operational plan for an interpretive activity (goals, target audience, resources needed etc.).</li> <li>- Identify different tools/methodologies to use during an interpretive activity.</li> <li>- Design different ways to transmit the same message to different target groups (children, youths, adults...).</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>- Active implementation</li> </ul>	40
<b>3. Execution, communication and safely guiding</b>	<ul style="list-style-type: none"> <li>- Transmit effectively the importance of the place and the conservation of the natural and cultural elements of a territory.</li> <li>- Explain effectively how the interpretive work can impact territory conservation and development.</li> </ul>	<ul style="list-style-type: none"> <li>- In writing</li> <li>-Orally</li> <li>- Active implementation</li> </ul>	20
<b>TOTAL points</b>			<b>100</b>
<b>Pass criteria: 60 points</b>			



## 2.2.4.6. Contents

1. Principles and general knowledges
  - a. Principles of territory conservation and development
  - b. The stakeholders of a territory: who they are, what they want and how they relate.
  - c. Principles of environmental education and heritage interpretation
2. Natural Heritage and Cultural Landscape resources:
  - a. Types of natural protected areas (Parks, Nature Reserves, Geosites) and its management and conservation. Strategies for Biodiversity.
  - b. Types of landscapes. Cultural landscapes: definition, examples etc.
  - c. The interpretive practice and different interpretive activities related to natural heritage and cultural landscape.
  - d. The landscape interpretation. Techniques.
  - e. Selection of rural heritage resources with significance and relevance.
  - f. Notions of Botany, Zoology and Anthropic Geography, Ecology, Biodiversity, etc
  - g. Elements of meteorology, cartography, topography and orientation techniques.
3. How to design a successful interpretive activity
  - a. Different target profiles, needs and expectations
  - b. Tools and methodologies to successfully engage with people
  - c. Quality control of the activity
  - d. Design interpretative paths, routes or itineraries of natural heritage.
  - e. Pathways and signs
4. Planning and monitoring of the activity.
  - a. Equipment for excursions (classification, management and maintenance).
  - b. Factors (dimensions) and quality indicators.
  - c. Planning of Excursions.
5. Development of itineraries and other activities
  - a. Principles of executing successful activities in relation to nature and landscape interpretation of a territory.
  - b. Communication.
  - c. Group management techniques and conflict management techniques.
  - d. Risk Management. The risks of hiking and the protection of the person. Elements of meteorology and climate (aimed at understanding potentially dangerous situations and safety measures). Services and competent Authorities in case of accidents or illnesses.
6. Best practices
  - a. Examples of best practices of interpretive activities related to natural heritage and cultural landscape



# 3. METHODOLOGY



**RURAL  
HERITAGE**

## 3 METHODOLOGY: NEW PEDAGOGICAL METHODOLOGIES FOR TRAINING ON INTERPRETATION OF EUROPEAN RURAL HERITAGE

### 3.1. INTRODUCTION. GENERAL PRINCIPLES

The *pedagogical approach* proposed by the RURAL HERITAGE project, based on a practical and emotional involvement of the student and on the working dynamics of heritage interpretation themselves, is one of the reasons why the project is innovative, as well as for the creation of new professional competences in rural heritage interpretation.

Although heritage interpretation has been developed for years, its practical and specialized training is not included in a sufficiently deep way in the offer of professional qualifications in tourism and environmental education existing in the different European countries.

RURAL HERITAGE aims to create professional competences for specialists in rural heritage interpretation and to provide a European dimension that does not exist in the existing supply of qualifications.

The project aims to complement the current training offer by further developing training in rural heritage interpretation practices and techniques as well as the enormous potential cultural value of the rural environment and the diversity of tangible and intangible heritage of different European regions and countries as a point of interaction for inclusive, cohesive and sustainable societies.

#### *Basic principles of methodological/didactic action*

As important methodological guidelines to be applied, we list below a series of general principles to be taken into account when developing the didactic programs of the different training modules, which are largely based on applying in the classroom the same fundamentals on which the professional practice of interpreting will be based:

- \* Adaptation to the target audience, in this case the students, based on prior knowledge of the group.
- \* Consideration of students' prior knowledge as a starting point for the acquisition of new learning and adaptation of the training process to the characteristics of the students.
- \* Connection of students' learning with the reality of their own environment with the aim of achieving competency-based learning.
- \* Creation of a pleasant and trusting atmosphere that encourages the active participation of the group in the training context.
- \* The teaching-learning process should be entertaining, enlightening, inspiring and provocative, developing didactic activities that awaken curiosity, self-discovery, creativity and a critical spirit.
- \* Active and participatory training based on experiences and experiences, with the greatest possible direct contact with the environment, in this case the rural environment and its natural and cultural heritage.
- \* Competency-based learning, trying to apply theory to practice.



- \* Use of new information and communication technologies as an educational teaching resource and as a means of searching for and selecting information and updating knowledge.
- \* Variety in assessment activities and instruments, using them as part of the learning process.
- \* Approaching the cultural diversity of Europe's rural heritage as well as the common cultural identity, fostering respect and social integration.

It is important not to forget the *objectives of the training activities* for future heritage guide-interpretors, which are summarized below, before going on to review the methodology used to meet these challenges.

Training in heritage interpretation basically aims to facilitate and train the specialist in rural heritage interpretation in:

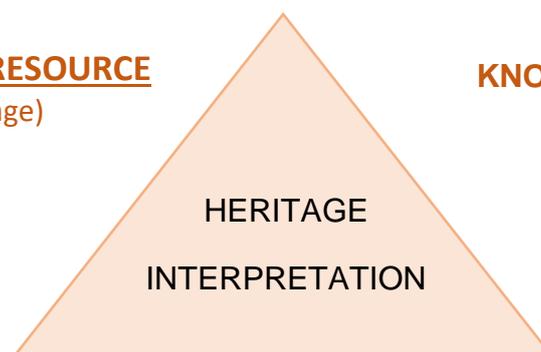
- An understanding of the meaning of heritage interpretation, its context, the settings for its application, and its potential as a tool for communication and on-site management.
- Mastery of methodological tools for visitor analysis (actual and potential).
- The analysis of the heritage resource (natural or cultural), the identification of features with interpretative potential, and the determination of the meanings of the resource.
- The use of essential methodology and interpretative techniques to adapt messages to different types of audiences, select the most appropriate interpretative media and finally plan and evaluate interpretative interventions.

### *The three pillars of the heritage interpretation that methodology will promote*

When a guide-interpretor develops interpretation there are three aspects which must be applied with ability therefore the three basic skills that define the work of interpreters and have been validated for use in professional standards must be encouraged by the teaching methodology implemented.

**KNOWLEDGE OF THE RESOURCE**  
(cultural and natural heritage)

**KNOWLEDGE OF THE AUDIENCE**



**APPROPRIATE TECHNIQUES**  
(Interpretation techniques)

When the future guide-interpretors develop interpretation the three aspects must be applied with ability. **These three basic groups of competences that define the work of interpreters must be promoted by the teaching methodologies used in professional standards.**



## 1) Competence in the knowledge of the resource

Knowledge of the resource is the basis upon which all the rest of the interpretive process is built. The messages that interpreters elaborate and transmit are a synthesis of that knowledge, the tip of the iceberg of everything that interpreter knows. Let's remember one of the main principles of the interpretation: *interpretation is revelation based on information, but information alone is not interpretation* (Freeman Tilden's second principle, 2006).

If interpreters have to properly translate the meaning of heritage resources at a site, they must have enough knowledge of these resources to be able to speak clearly. The job of interpreters is to facilitate a connection between the interest of visitors and the meanings of the resource- an impossible task without a solid and accurate knowledge of the resource.

Interpretation relies on multi-disciplinary knowledge to provide different audiences with relevant, and meaningful connections to heritage resources. Knowledge of the cultural diversity of European rural heritage as well as the common cultural identity is essential, fostering respect and social integration.

Interpreters must understand multiple points of view regarding the resource as well as the place's past and current conditions and possess the skills to interpret them for all visitors. Interpreters must make public understand many opinions and perspectives on each issue and encourage visitors to see the resources from different perspectives hence the importance of a methodology that enhance critical spirit.

Methodology used to teach interpretation of heritage will promote the in-depth research and knowledge of the resource (up to date, accurate and understandable) using the philosophy, methodology and assumptions of the professional disciplines to investigate and evaluate the reliability and validity of sources of information.

## 2) Competence in the knowledge of the audience

To develop a relevant interpretation for different audiences, knowledge of their characteristics, interests, expectations and multiple points of view is necessary. Knowledge of life stages, including different forms of audience learning and functional development among different audience members, is critical to meeting the varied expectations and interests of this audience. Understanding the many motivations for visiting a place of heritage value and being aware of the attitudes that visitors have about the resource can be very important elements in making interpretation relevant to as many visitors as possible.

All audiences who want to visit or read about a site are seeking something of value for themselves. They expect something special. Many have a personal sense of what the

Interpreters must recognize and respect the specific personal values and interest visitors associate with resources.

## 3) Competence in the use of appropriate techniques

Interpretation has a wide variety of techniques such as Interpretative techniques

There are many interpretative techniques such as: storytelling, mentioning important texts, development of practical activities, use of humour, use of imagination, comparisons and analogies, irony, demonstrations, mystery, personification of elements, use of the senses, question and answer strategy, debates, proverbs, going from the particular to the general, etc.



Skilfully execute this variety of interpretative techniques is essential and that is why the didactic methodology will put in practice them. Whichever technique is selected, all of them must be motivating, thought-provoking, participatory, emotional, etc.

## 3.2. DIDACTIC METHODOLOGY IN THE TRAINING OF HERITAGE INTERPRETERS

The proposed *teaching-learning methods* are based on active, creative and emotional methodologies that place the student at the center of the process and on the other hand, as mentioned above, on the implementation of the techniques of heritage interpretation and environmental education, which are particularly useful for training in heritage transmission.

38

We can structure the didactic methodology in two independent blocks which in turn interrelate with each other:

### 1) APPLICATION OF OWN TECHNIQUES AND METHODS OF HERITAGE INTERPRETATION:

The teaching techniques used for the training of future interpreters will be based on the following inspiring principles of heritage interpretation (according to the principles of Tilden and, years later, Larry Beck and Ted Cable in their work “Interpretation for the 21st Century - Fifteen Guiding Principles for Interpreting Nature and Culture”, published in 1998):

- They will seek to go beyond the transmission of knowledge and information, seeking to reveal deeper meanings as well as to educate, inspire and provoke the learner.
- Awareness and intervention in the environment. Action-oriented learning is proposed, bringing into play knowledge, skills and personal attitudes, i.e. the elements that make up the different competences that will enable ethical and critical intervention in the interpretation, use, enjoyment and conservation of cultural heritage.
- Consideration of rural heritage from an integrating conception, helping to establish relations between knowledge of the heritage and its management and conservation.
- Combining traditional teaching methods with innovative proposals that generate learning environments that enrich the training process, taking into account the possibilities offered by new information and communication technologies. Although new technologies can reveal the world in new and exciting ways, its incorporation into interpretative programs should be done with restraint.
- The different topics will be presented in a comprehensive approach applying communication and interpretation techniques and promoting purposefully designed interpretive activities and programs. Before applying interpreting designs, basic communication techniques will be introduced and put into practice. Quality interpretation is based on the communication skills and knowledge of the interpreter and these attributes must be developed (and will need to be continually updated and encouraged).
- Passion, as an indispensable ingredient for effective interpretation (passion for the feature being interpreted and for those who come to be inspired by it) will also be a fundamental element in the teaching-learning process.



The *TORE method* is an essential core part of interpreting training. It is a basic model that has become a kind of "world standard" for professionalism in interpretation and has been adapted to interpretation programs all over the world.

Each letter brings with it a system of methods and techniques that an interpreter must understand and use to bring quality to his or her interpretation:

- **Thematic:** It is developed around a powerful theme, a main idea that organizes and gives meaning to other information.
- **Organized:** information is easy to follow and process. Categorizing makes it easier for people to remember a communication process with a limited number of ideas (approximately 5) related to the main topic.
- **Relevant:** it has meaning for the recipient, i.e. it relates to his or her experiences and knowledge.
- **Entertaining:** that entertains, holds attention and amuses.

## 2) ACTIVE, CREATIVE and EMOTIONAL METHODOLOGIES

These methodologies place the student at the center of the process and make him/her the protagonist of discoveries, emotions and experiences, instead of just simply receivers of information. Teaching strategies are proposed for active and emotional learning that improve understanding and are effective in the development of high cognitive skills.

These methodologies will subsequently be useful for the practice of heritage transmission and interpretation in tourism activities that seek to show heritage sites or resources to the public by establishing connections between the heritage (tangible and intangible) and the visiting public.

Both intellectual and emotional connections are essential, especially to achieve committed attitudes of support from visitors in the care and conservation of heritage. This is what in advertising is called emotional persuasion, "the emission of sensations that connect directly with unconscious emotions" (Joan TORRES, 2007). The Heritage Interpretation uses these tools to seduce, without renouncing to inform and strengthen the critical spirit, and to induce behaviour in favour of conservation.

For this reason, the methodology that develops artistic and creative techniques (creative, sensorial, sensory and mental techniques) is considered interesting so that the future interpreter can be a facilitator of exciting, fun and pleasurable experiences when it comes to bringing visitors closer to the rural environment and its rich heritage, achieving a deeper knowledge and a real emotional bond between the visitor and the place, through different artistic techniques (i.e. setting, scenography, music, theatre, artistic creations, photography, literature, etc.).

This is the innovation that this project brings, trying to overcome the transmission of heritage in a merely expository and informative way, using artistic and emotional skills to overcome this usual approach and create intense creative experiences.

Contrary to the often widespread idea that art or creativity are not easily learned, we believe that the learning of these techniques can and should be promoted, and also serve to raise awareness of the social importance of human development through culture, heritage or art.



On the other hand, according to heritage interpretation experts, the interpretation discipline should "stimulate people's capacities and boost a desire to feel the beauty of environment, to elevate the spirit and encourage the conservation of what is interpreted".

Furthermore, when we highlight the importance of communication, we are referring to the whole range of communication skills that go beyond speeches or masterly explanations and often rely on creativity and artistic expression.

### *Teaching methodology in heritage interpretation training*

Below we list some important aspects to bear in mind in relation to teaching methodology in heritage interpretation training (which largely follows the recommendations set out by *Jorge Morales*, consultant and trainer, expert in Heritage Interpretation):

40

- Theoretical lectures should be illustrated with examples and case studies and supported by slides, PowerPoint and interpretative material (handouts, scripts, panels, etc.).
- Whenever possible, practical outings or excursions will be organized for learning in direct contact with the environment.
- Practical work carried out in an authentic or simulated location: Identifying and locating rural cultural heritage elements, interpreting them, etc.
- Combination of theoretical classes with practical work in small groups, pairs or individually, to gather information and analyze concepts. Teachers' explanations should be measured out and the process should be as enjoyable and entertaining as possible.
- Discussion and debriefing with the mentor/trainer/teacher. Sharing of the work, with participation and debate among all. The teacher's tasks will be to guide, reorient and recapitulate the concepts analyzed and the conclusions drawn by the students and, if appropriate, to contrast with other approaches.
- Theoretical presentation of procedures and guidelines for the design of media and activities (how to design a guided tour, how to design an interpretative sign, etc.), followed by practical work, also individually, in pairs or in groups, for the design of interpretative media and activities, based on simulated scenarios or real cases.
- Visits and approaches to cases of interpretation: the work of a professional interpreter-guide, a self-guided trail, a visitor center with exhibitions or any other interpretation equipment. Application of "check lists" or "analysis guidelines" provided by the teacher to assess the suitability of the equipment or service to the professional criteria of interpretation.
- Discussions and sharing of the analysis carried out during the visit to the cases.
- Practical exercises in interpretive design, implementation and planning.
- Application of interpretation evaluation techniques.



Face-to-face training in direct contact with the environment is always more advisable. In the case of non-face-to-face training, practical exercises should be included in the different training modules and should be sufficiently clear for the trainees to be able to execute them correctly, including:

- Theoretical lessons with as many examples as possible.
- Very clear instructions for the practical exercises.
- Presentation of the results.
- It is also important to integrate some form of personalized tutoring into this non-presential learning Modality.



## 4. GLOSSARY



**RURAL  
HERITAGE**

## 4 GLOSSARY

---

**adult education** General or vocational education provided for adults after initial education and training for professional and/or personal purposes, and which aims to:

- provide general education for adults in topics of particular interest to them (e. g. in open universities);
- provide compensatory learning in basic skills which individuals may not have acquired earlier in their initial education or training (such as literacy, numeracy) and thus to;
- give access to qualifications not gained, for various reasons, in the initial education and training system;
- acquire, improve or update knowledge, skills or competences in a specific field: this is continuing education and training.

Comment: adult education is close to, but not synonymous with continuing education and training.

Source: adapted from European Training Foundation 1997; Cedefop, 2004.

---

**assessment of learning outcomes** Process of appraising knowledge, know-how, skills and/or of learning outcomes competences of an individual against predefined criteria (learning expectations, measurement of learning outcomes). Assessment is typically followed by certification.

Comment: in the literature, 'assessment' generally refers to appraisal of individuals whereas 'evaluation' is more frequently used to describe appraisal of education and training methods or providers.

Source: Cedefop, 2004.

---

**awarding body** A body issuing qualifications (certificates, diplomas or titles) formally recognising the learning outcomes (knowledge, skills and/or competences) of an individual, following an assessment procedure.

Source: Cedefop, 2008.

---

**basic information and communication technology (ICT) skills** The skills needed to use efficiently the elementary functions of assess, store, produce, present and exchange information, and to communicate and participate in collaborative networks via the Internet.

Comment: basic ICT skills are now part of key skills/key competences.

Source: European Parliament and Council of the European Union (2006); Cedefop, 2012.

---



---

**benefits of education and training**

Socioeconomic added value of education and training.

Comments:

- benefits of education and training can be private, namely received by individual persons, enterprises or institutions, or public, benefiting a whole region, economy or society;
- benefits can be monetary (such as wages) or socioeconomic (health, wellbeing, social cohesion, reduced crime, employment, productivity, growth).

Source: Cedefop.

---

**certification of learning outcomes**

Process of issuing a certificate, diploma or title formally attesting that a set of learning outcomes (knowledge, know-how, skills and/or competences) acquired by an individual have been assessed by a competent body against a predefined standard.

Source: Cedefop, 2008.

---

**comparability of qualifications**

Extent to which it is possible to establish equivalence between of qualifications the level and content of qualifications (certificates, diplomas or titles) at sectoral, regional, national or international levels.

Comment: comparability of qualifications improves individuals' employability and mobility. This term must not be confused with 'equivalence of qualifications' (which refers to the similarity of value of certificates or diplomas).

Source: Cedefop, Bjørnåvold, Tissot, 2000.

---

**compensatory learning**

Learning intended to fill the gaps accumulated by individuals during education or training, mainly to enable them to take part in training.

Source: Cedefop, 2004.

---

**competence**

Ability to apply learning outcomes adequately in a defined context (education, work, personal or professional development).

or

Ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development. Comment: competence is not limited to cognitive elements (involving the use of theory, concepts or tacit knowledge); it also encompasses functional aspects (including technical skills) as well as interpersonal attributes (e.g. social or organisational skills) and ethical values.

Source: Cedefop; European Parliament and Council of the European Union, 2008.

---



---

**continuing education and training**

Education or training after initial education and training – or after entry into working life aimed at helping individuals to:

- improve or update their knowledge and/or skills;
- acquire new skills for a career move or retraining;
- continue their personal or professional development.

Comment: continuing education and training is part of lifelong learning and may encompass any kind of education (general, specialised or vocational, formal or non-formal, etc.). It is crucial for employability of individuals.

Source: Cedefop, 2004.

---

**credit system**

An instrument designed to enable accumulation of learning outcomes gained in formal, non-formal and/or informal settings, and ease their transfer from one setting to another for validation. A credit system can be designed by describing:

- an education or training programme and attaching points (credits) to its components (modules, courses, placements, dissertation work, etc.); or
- a qualification using units of learning outcomes and attaching credit points to every unit.

Source: Cedefop, 2008.

---

**curriculum**

Inventory of activities related to the design, organisation and planning of an education or training action, including definition of learning objectives, content, methods (including assessment) and material, as well as arrangements for training teachers and trainers.

Comment: the term curriculum refers to the design, organisation and planning of learning activities while the term programme refers to the implementation of these activities.

Source: Cedefop, 2008; Landsheere, 1979.

---

**digital competence / digital literacy**

Ability to use information and communication technology (ICT).  
 Comment: digital competence is underpinned by basic skills in ICT: use of computers to retrieve, assess, store, produce, present and exchange information, and to communicate and participate in collaborative networks via the Internet.

Source: Cedefop, 2008; European Parliament and Council of the European Union, 2006.

---

**distance education and training**

Education and training imparted at a distance through communication media: books, radio, TV, telephone, correspondence, computer or video.

Source: based on ILO, 1979.

---



**education or training provider**

Any organisation or individual providing education or training services.

Comment: education and training providers may be organisations specifically set up for this purpose, or they may be other bodies, such as employers who provide training as part of their business activities. Training providers also include independent individuals who offer services.

Source: Cedefop, 2008.

**e-learning**

Learning supported by information and communication technologies (ICT). Comments:

- e-learning is not limited to 'digital literacy' (acquiring ICT skills). It may encompass multiple formats and hybrid methods: using software, Internet, CD-ROM, online learning or any other electronic or interactive media;
- e-learning can be used as a tool for distance education and training but also to support face-to-face learning.

Source: Cedefop, 2008.

**emerging/new skills**

Abilities for which demand is increasing in existing or new occupations.

Comment: identification of new/emerging skills needs is crucial to prevent skill gaps and shortages, foster employability of citizens and meet needs of the economy.

Source: Cedefop.

**employability**

Combination of factors which enable individuals to progress towards or get into employment, to stay in employment and to progress during their careers.

Comment: employability of individuals depends on:

- personal attributes (including adequacy of knowledge and skills);
- how these personal attributes are presented on the labour market;
- environmental and social contexts (incentives and opportunities offered to update and validate their knowledge and skills); and
- the economic context.

Source: Cedefop, 2008, adaptado de Scottish Executive, 2007; The Institute for Employment Studies, 2007.

**europass**

Portfolio of five documents helping citizens to better communicate their skills and qualifications when applying for job or study in Europe. The Europass CV and the Language Passport are completed by citizens themselves; the other three documents can be issued to citizens who achieve a mobility experience in another European country (Europass Mobility) or who complete a formal



---

programme of vocational education or training (Certificate supplement) or of higher education(Diploma supplement).

Comment: Europass promotes an adequate appreciation of learning outcomes acquired in formal, non-formal or informal settings.

Source: Cedefop.

---

### **European credit system for Vocational Education and Training (ECVET)**

Technical framework for transfer, validation and, where appropriate, accumulation of learning outcomes by individuals, to achieve a qualification. ECVET tools and methodology comprise a description of qualifications in units of learning outcomes with associated points, a transfer and accumulation process and complementary documents such as learning agreements, transcripts of records and ECVET users' guides.

Comments:

- This framework aims to promote:
  - mobility of people undertaking training;
  - accumulation, transfer and validation of learning outcomes (either formal, non-formal or informal) acquired in different countries; – implementation of lifelong learning;
  - transparency of qualifications;
  - common trust and cooperation between providers of vocational training and education in Europe.
- ECVET is based on the description of qualifications in terms of learning outcomes (knowledge, skills and/or competences), organised into transferable and accumulable learning units to which credit points are attached and registered in a personal transcript of learning outcomes.

Source: Cedefop; European Parliament and Council of the European Union, 2009a.

---

### **European qualifications framework for lifelong learning (EQF)**

Reference tool for describing and comparing qualification levels in qualifications systems developed at national, international or sectoral levels.

Comment: the EQF's main components are a set of eight reference levels described in terms of learning outcomes (a combination of knowledge, skills and/or competences) and mechanisms and principles for voluntary cooperation. The eight levels cover the entire span of qualifications from those recognising basic knowledge, skills and competences to those awarded at the highest level of academic, professional and vocational education and training. EQF is a translation device for qualification systems.

Source: based on European Parliament and Council of the European Union, 2008.

---



<b>evaluation of education and training</b>	Judgment on the value of an intervention, training programme or policy with reference to criteria and standards (such as its relevance or efficiency).
	Source: Cedefop, 2011.
<b>formal learning</b>	Learning that occurs in an organised and structured environment (such as in an education or training institution or on the job) and is explicitly designated as learning (in terms of objectives, time or resources). Formal learning is intentional from the learner's point of view. It typically leads to certification.
	Source: Cedefop, 2008.
<b>green skills</b>	Abilities needed to live in, develop and support a society which aims to reduce the negative impact of human activity on the environment.
	Comments: generic green skills help develop awareness-raising or implementation of resource-efficient activities, ecocitizenship, etc.; specific green skills are required to implement standards and processes to protect ecosystems and biodiversity, and to reduce energy, materials and water consumption; highly-specialised green skills are required to develop and implement green technologies such as renewable energies, sewage treatment or recycling.
	Source: Cedefop.
<b>informal learning</b>	Learning resulting from daily activities related to work, family or leisure. It is not organised or structured in terms of objectives, time or learning support. Informal learning is in most cases unintentional from the learner's perspective.
	Comments: <ul style="list-style-type: none"> <li>• informal learning outcomes may be validated and certified;</li> <li>• informal learning is also referred to as experiential or incidental/random learning.</li> </ul>
	Source: Cedefop, 2008.
<b>job</b>	Set of tasks and duties performed, or meant to be performed, by one person, including for an employer or in self-employment.
	Source: ILO, 2008.
<b>key skills / key competences</b>	Sum of skills (basic and new basic skills) needed to live in contemporary knowledge society.
	Comment: in its recommendation on key competences for lifelong learning, the European Commission sets out eight key competences: <ul style="list-style-type: none"> <li>• communication in the mother tongue;</li> <li>• communication in foreign languages;</li> </ul>



- 
- competences in maths, science and technology;
  - digital competence;
  - learning to learn;
  - interpersonal, intercultural and social competences, and civic competence;
  - entrepreneurship;
  - cultural expression.

Source: Cedefop, 2004; European Parliament and Council of the European Union, 2006.

---

## knowledge

Outcome of assimilation of information through learning. Knowledge is the body of facts, principles, theories and practices related to a field of study or work. Comment: there are numerous definitions of knowledge. Nevertheless, modern conceptions of knowledge rest broadly on several basic distinctions:

- Aristotle distinguished between theoretical and practical logic. In line with this distinction, modern theoreticians (Alexander et al., 1991) distinguish declarative (theoretical) knowledge from procedural (practical) knowledge. Declarative knowledge includes assertions on specific events, facts and empirical generalisations, as well as deeper principles on the nature of reality. Procedural knowledge includes heuristics, methods, plans, practices, procedures, routines, strategies, tactics, techniques and tricks (Ohlsson, 1994);
- it is possible to differentiate between forms of knowledge which represent different ways of learning about the world. Various attempts have been made to compile such lists, the following categories seem to be frequently represented:
  - objective (natural/scientific) knowledge, judged on the basis of certainty;
  - subjective (literary/aesthetic) knowledge judged on the basis of authenticity;
  - moral (human/normative) knowledge judged on the basis of collective acceptance (right/wrong);
  - religious/divine knowledge judged by reference to a divine authority (God).

This basic understanding of knowledge underpins the questions we ask, the methods we use and the answers we give in our search for knowledge;

- knowledge encompasses tacit and explicit knowledge. Tacit knowledge (Polanyi, 1967) is knowledge learners possess which influences cognitive processing. However, they may not necessarily express it or be aware of it. Explicit knowledge is knowledge a learner is conscious of, including tacit knowledge that converts into an explicit form by becoming an 'object of thought' (Prawat, 1989).

Source: Cedefop, 2008; European Parliament and Council of the European Union, 2008.

---



---

**learning** Process by which an individual assimilates information, ideas and values and thus acquires knowledge, know-how, skills and/or competences.

Comment: learning occurs through personal reflection, reconstruction and social interaction. It may take place in formal, non-formal or informal settings.

Source: Cedefop, 2008.

---

**learning outcomes / learning attainments**

Set of knowledge, skills and/or competences an individual has acquired and/or is able to demonstrate after completion of a learning process, either formal, non-formal or informal. or Statements of what a learner knows, understands and is able to do on completion of a learning process, which are defined in terms of knowledge, skills and competence.

Source: Cedefop, 2008; European Parliament and Council of the European Union, 2008.

---

**level of qualification**

The term covers two aspects: Level of attainment in formal education and training, recognised in a qualification system or in a qualification framework.

or

Level of proficiency acquired through education and training, work experience or in non-formal/informal/ settings.

Comments:

- level of qualification is often determined by what is expected in qualification systems or by level descriptors of qualifications frameworks;
- it can also be determined by an occupational profile (for example, description of the learning outcomes required to perform the tasks attached to a job at a specific level of responsibility and autonomy).

Source: Cedefop.

---

**lifelong learning**

All learning activity undertaken throughout life, which results in improving knowledge, know-how, skills, competences and/or qualifications for personal, social and/or professional reasons.

Source: Cedefop, 2008.

---

**non-formal learning**

Learning embedded in planned activities not explicitly designated as learning (in terms of learning objectives, learning time or learning support). Non-formal learning is intentional from the learner's point of view.

Comments:

---



- 
- non-formal learning outcomes may be validated and may lead to certification;
  - non-formal learning is sometimes described as semi-structured learning.

Source: Cedefop, 2008

---

### **qualification**

Qualification covers different aspects:

- Formal qualification: the formal outcome (certificate, diploma or title) of an assessment process which is obtained when a competent body determines that an individual has achieved learning outcomes to given standards and/or possesses the necessary competence to do a job in a specific area of work. A qualification confers official recognition of the value of learning outcomes in the labour market and in education and training. A qualification can be a legal entitlement to practise a trade (OECD);
- Job requirements: knowledge, aptitudes and skills required to perform specific tasks attached to a particular work position (ILO).

Source: Cedefop, 2008, based on Eurydice, 2006; European Training Foundation, 1997; OECD, 2007; ILO, 1998.

---

51

### **qualifications framework**

Instrument for development and classification of qualifications (at national or sectoral levels) according to a set of criteria (using descriptors) applicable to specified levels of learning outcomes.

or

Instrument for classification of qualifications according to a set of criteria for specified levels of learning achieved, which aims to integrate and coordinate qualifications subsystems and improve transparency, access, progression and quality of qualifications in relation to the labour market and civil society.

Comment: A qualification framework can be used to:

- establish national standards of knowledge, skills and competences; promote quality of education;
- provide a system of coordination and/or integration of qualifications and enable comparison of qualifications by relating qualifications to one another;
- promote access to learning, transfer of learning outcomes and progression in learning.

Source: Cedefop, 2008; European Parliament and Council of the European Union, 2008; OECD, 2007.

---

### **recognition of learning outcomes**

Formal recognition: process of granting official status to knowledge, skills and competences either through:

- validation of non-formal and informal learning;
  - grant of equivalence, credit units or waivers;
  - award of qualifications (certificates, diploma or titles).
- 



---

and/or

Social recognition: acknowledgement of value of knowledge, skills and/or competences by economic and social stakeholders.

Source: Cedefop, 2008.

---

**sector**

Group of companies with the same main economic activity (such as chemicals).

or

Grouping of professional activities based on their main economic function, product, service or technology.

Source: Cedefop, 2008; European Parliament and Council of the European Union, 2008.

---

52

**skill**

Ability to apply knowledge and use know-how to complete tasks and solve problems.

Source: Cedefop; European Parliament and Council of the European Union, 2008.

---

**skill gap**

Situation where an individual does not have the level of skills required to perform his or her job adequately.

Comments:

- skill gaps can be analysed at individual level (using a skills audit), at company/sector level, or at regional, national or international levels;
- skill gaps can be linked to an insufficient level of qualification; they may also refer to situations where the workforce has the right level of qualification but lacks specific types of skills (such as management skills) or experience required to perform a task or a job adequately.

Source: Cedefop, 2010.

---

**skill mismatch**

Situation of imbalance in which the level or type of skills available does not correspond to labour market needs.

Comments:

- skills mismatch can be a surplus or a lack of knowledge, abilities and competences;
  - skill mismatch can be analysed at different levels (individual, enterprise, sectoral, economy);
  - experts distinguish between vertical mismatch (the level of education/skills is higher or lower than required) and horizontal mismatch (the level of education/skills matches job requirements, but the type of education/skills is inappropriate for the current job).
- 



---

Source: Cedefop.

---

### **skill needs**

Demand for particular types of knowledge and skills on the labour market (total demand within a country or region, economic sector, etc.).

Comments: skills needs analysis (also referred to as identification of skills needs) aims at identifying skills gaps and shortages, anticipating skills needs, and assessing the capacity of qualification systems (education and training provision, funding schemes, etc.) to meet the needs of the economy; anticipation of skills needs is the process of identifying skills the economy will require in a short, medium or longer term; skills forecasting estimates the skill demand (jobs) and/or skill supply (labour force) that will be available on a short, medium or long term.

Source: Cedefop, 2010.

---

### **social partners**

Employers' associations and trade unions forming the two sides of social dialogue. Comments:

- the concept of 'social partner' originates in France and Germany and was subsequently taken up in EU circles;
- tripartite social dialogue also involves public authorities and/or representatives of civil society, NGOs, etc.

Source: Cedefop, 2008.

---

### **Standards**

Series of elements whose content is defined by concerned actors.

Comments: One can distinguish between several types of standards:

- competence standard refers to knowledge, skills and/or competences linked to the practice of a job;
- educational standard refers to statements of learning objectives, content of curricula, entry requirements as well as resources required to meet learning objectives;
- occupational standard refers to the statements of the activities and tasks related to a specific job and to its practice;
- assessment standard refers to statements of the learning outcomes to be assessed and the methodology used;
- validation standard refers to statements of level of achievement to be reached by the person assessed, and the methodology used;
- certification standard refers to statements of the rules applicable for obtaining a certificate or diploma as well as the rights conferred. According to the system, these standards can be defined separately or be part of one document.

Source: Cedefop, 2008.

---



**teacher**

Person whose function is to impart knowledge, know-how or skills to learners in an education or training institution.

Comment: a teacher may fulfil several tasks such as organising and carrying out training programmes/courses and transmitting knowledge, whether generic or specific, theoretical or practical. A teacher in a vocationally-oriented institution may be referred to as a 'trainer'.

Source: Cedefop, 2004; AFPA 1992.

**trainer**

Anyone who fulfills one or more activities linked to the (theoretical or practical) training function, either in an institution for education or training, or at the workplace.

Comments:

- two categories of trainer can be distinguished:
  - professional trainers are training specialists whose job may coincide with that of the teacher in a vocational training establishment;
  - part-time or occasional trainers are professionals in various fields who take on, in their normal duties, part-time training activity, either in-company (as mentors and tutors of recruits and apprentices or as training providers) or externally (by occasionally offering their services at a training establishment);
- trainers may carry out various tasks:
  - design training activities;
  - organise and implement these activities;
  - provide the actual training (transfer knowledge, know-how and skills);
  - help apprentices develop their skills by providing advice, instructions and comments throughout the apprenticeship.

Source: Cedefop, 2004; AFPA 1992.

**training course planning and design**

Set of consistent methodological activities employed in designing and planning training initiatives and schemes against objectives set.

Comment: training course planning and design includes analysis of training demand and needs, project design, coordination and implementation monitoring as well as assessment of training impact.

Source: based on Le Préau, 2002.

**training needs analysis**

Systematic evaluation of present and future skills needs against the skills available to implement an efficient training strategy.

Comments:

- training needs analysis rests on:



- 
- (a) identification of skills needs;
  - (b) assessment of skills available in the workforce, and
  - (c) appraisal of skills gaps and shortages;

- training needs analysis can be conducted at individual, organisational, sectoral, national or international levels; it may focus on quantitative or qualitative aspects (such as level and type of training) and should ensure that training is delivered effectively and cost-efficiently.

Source: Cedefop, 2008.

---

**unit of learning outcomes (ECVET)**

Component of a qualification, consisting of a coherent set of outcomes (ECVET) knowledge, skills and competences, that can be assessed and validated;

or

Set of knowledge, skills, and/or competences which constitute a coherent part of a qualification. A unit can be the smallest part of a qualification that can be assessed, transferred and, possibly, certified. It can be specific to a single qualification or common to several qualifications.

Comment: the characteristics of units (content, size, total number of units composing a qualification, etc.) are defined by the competent body responsible for the qualification at the appropriate level. The definition and description of units can vary according to the qualifications system and procedures of the competent body. However, the ECVET system proposes to provide for every unit:

- its generic title;
- the knowledge, skills and competences contained in it;
- the criteria for assessment of the corresponding learning outcomes.

Source: European Parliament and Council of the European Union, 2009a; Cedefop, 2008.

---

**validation of learning outcomes**

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

or

Process of confirmation by an authorised body that an individual has acquired learning outcomes measured against a relevant standard. Validation consists of four distinct phases:

- identification through dialogue of particular experiences of an individual;



- 
- documentation to make visible the individual's experiences;
  - formal assessment of these experiences; and
  - certification of the results of the assessment which may lead to a partial or full qualification.

Source: Cedefop, 2008; Council of the European Union, 2012.

---

**vocational  
education and  
training (VET)**

Education and training which aims to equip people with knowledge, know-how, skills and/or competences required in particular occupations or more broadly on the labour market.

Source: adapted from European Training Foundation, 1997.

---

56

CEDEFOP (European Centre for the Development of Vocational Training). 2014. *Terminology of European education and training policy: A selection of 130 key terms* (2. ed). Luxembourg: Publications Office of the European Union. Retrieved from: <https://www.cedefop.europa.eu/en/publications-and-resources/publications/4117>

**Disclaimer:** The glossary Terminology of European Education and Training Policy: a selection of 130 key terms (2nd edition) was utilised for the purpose of determining the terminology that would be used in the Rural Heritage project outputs.



Project RURAL HERITAGE: Training plan on European cultural heritage interpreter in rural areas. Project ERASMUS+: 2020-1-ES01-KA202-082577



Co-funded by the  
Erasmus+ Programme  
of the European Union



The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the authors' views and the Commission cannot be held responsible for any use which may be made of the information contained therein.