Can Heritage bring Europeans together?

Exploring the potential of Heritage Interpretation to strengthening common values and European cohesion

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Table of Contents

A   Introduction

by Patrick Lehnes (University of Freiburg)

"**DELPHI**" is a project acronym. Nowadays, you need nice sounding, easy to remember project acronyms for rather complicated full project titles. DELPHI stand for:

Development of Continuing **P**rofessional Development for **H**eritage **I**nterpretation staff to facilitate **L**ifelong learning for social **I**nclusion and European cohesion.

Although, the project deals with heritage, it does not refer directly to the famous Delphi heritage site in Greece. It was tempting to allude to Delphi in the logo, but then the group deliberately opted against this idea as this could create false expectations that the project dealt with that particular site. The DELPHI logo now symbolises plural voices which overlap and contribute with their diverse colours, aiming to become united in diversity.

But then, as the project advanced, the link to ancient Delphi became more obvious. Everybody who entered the ancient Apollo temple at Delphi was greeted with the following inscriptions.

ΓΝΩΘΙ ΣΕΑΥΤΟΝ	KNOW THYSELF
ΜΗΔΕΝ ΑΓΑΝ	NOTHING IN EXCESS
ΕΓΓΥΑ, ΠΑΡΑ ΔΑΤΗ	SURETY BRINGS RUIN

It turned out that they are a crucial guideline for heritage interpreters and adult educators aiming to contribute to more inclusive and sustainable societies.

DELPHI goals

DELPHI aims to address the challenges related to migration, concerning integration, cultural shifts, religious, cultural identities and populist movements threatening cohesion of the EU but also of societies and local communities in member states. In December 2017 the European council emphasised at its Gothenburg summit that "education and culture are key to building inclusive and cohesive societies". This echoes the Council of Europe's "Faro Convention" from 2005.

During the project lifetime, the problem of climate change became even more pressing. it underlined the urgent need of societal transformation towards sustainable development which encompasses care for the environment as well as for the needs of others humans...

To this end the DELPHI project focused on professional development in Heritage Interpretation (HI). HI may be characterised as the art to create a relation between the elements of a heritage site, a collection or an intangible cultural asset and the meaning making and value frames of the visitors. Heritage Interpretation creates cognitive and emotional links between the visitors and what they can discover on-site.

DELPHI further developed training modules and a competence framework with a focus on

- value-oriented heritage interpretation,
- innovative approaches to co-creative heritage interpretation projects involving stakeholders and non-expert heritage communities,
- professional development for heritage interpreters, cultural heritage staff & volunteers and adult educators delivering informal learning and European culture awareness in inspiring heritage contexts.

DELPHI contributes to the field of "transformative learning" which reaches beyond teaching reproducible knowledge and skills. It aims for self-directed, experiential and practical adult learning (Cranston, 2006) and may shift the learner's way of being in the world by shifting one's perspective (Walsh et al. 2020). Heritage interpretation as transformative learning thus "affects personal understanding of ourselves, relationships with other people, ways of thinking, belief systems, responses to environment, and overall interpretation of the world" (Simek, 2012).

The DELPHI partnership

Seven partners combined a wealth of experience in the field of adult education, heritage management and heritage interpretation:

The **German Institute for Adult Education** (DIE - Deutsches Institut für Erwachsenenbildung) in Bonn, served as coordinator and contributes its expertise in the field of professionalisation in adult education.

Landcommanderij Alden Biesen near Liège in Belgium recently developed the BADGES project which validates visitors' non-formal learning at cultural heritage sites, developing learning paths as an app. Their previous experience also includes the development of a competence profile for heritage interpreters as part of the InHerit project.

The Greek project partner **The Mediterranean Center of Environment** (MCE) developed a certificate course for heritage interpreters in the HeriQ project which became mainstreamed by Interpret Europe's training and certification programme.

The **Blended Learning Institutions Cooperative** (Blinc) in Germany has years of experience in creating learning platforms that enable learning, validation and documentation.

The **Associazione Culturale Imago Mundi Onlus** which started the "Monumenti Aperti" movement in Sardinia and Italy been successfully running this project for many years, brings their extensive experience of heritage sites and the training of interpreters to the project.

The 'Heritage Interpretation' research and development group at **Albert-Ludwigs-University Freiburg** (ALU-FR), Germany, is one of the founding member of Interpret Europe. Member of the team were involved in the InHerit and HIMIS projects. The later trained teachers and learners to develop values of inclusiveness based on cultural heritage.

The Centre for Applied Archeology (CAA) at **University College London** (UCL) was the first institution in the UK to develop modules for heritage interpreters at university level.

Interpret Europe (IE), the European Association for Heritage Interpretation, was an associated partner of DELPHI, supporting the project with its Europe wide network for dissemination and promoting the exploitation of results.

Results

The DELPHI partnership produced the following major results:

- the [DELPHI website](#)
- the [DELPHI toolkit](#) comprising
  - a competence framework for value-oriented heritage interpretation
  - a template for module descriptions
  - 24 modules and related materials
- a [documentation of the final conference](#)
- this publication

From 'stocktaking' to transformative research

This report outlines the research component of DELPHI. It was originally envisaged as a stocktaking research exploiting already available knowledge and experience and creating a base of common understanding within the partnership. This turned out to be more difficult than anticipated. The partners as well as trainees in the pilot course came from very different disciplinary and professional backgrounds:

- general adult education
- participatory community focused heritage management (context of the CoE's 'Faro approach')
- heritage interpretation as an applied discipline and professional field

Differences in understanding and perspectives became obvious only as concrete work progressed. For example, only during the in-person pilot course differences in expectations and underlying assumptions could be grasped. For example, heritage interpreters took it for granted that the starting point of interpretive planning is a concrete heritage asset, such as site or collection. From this central issue of interest the question arises for whom this heritage is – or could be meaningful, who are the visitors, the stakeholders connected with the site etc. Those who came from the

discourse around the 'Faro' convention, the local community is of central interest. They ask which structures and traditions are carrying heritage value for people who live there. Furthermore the approach of interpretation based on a theory of basic human values is new territory for all. Hence, the project required flexible adjustments which allowed to explore an emerging transdisciplinary field, connecting different ways of thinking.

That way DELPHI's research component became an example of transformative research: oscillating between developing and testing new approaches under real-world conditions, exploration of unanticipated issues and refection of theoretical assumptions and implications. Major progress was made during the final months of the project in response to challenges and lessons learnt during the pilot course and mentoring of trainees' projects.

The time pressure to finalise products and tools within two years and the Corona pandemic did not allow for sufficient in-depth discussions within the project partnership. Therefore some of the arguably most important results produced by different partners could not be streamlined. The contributions in this publication reflect a compilation of interim results from different perspectives. They are part of an ongoing development process within transformative education and research, which will have to continue.

B   Can Heritage Interpretation unite us in diversity?

1   Towards a new paradigm of Heritage Interpretation?

by Patrick Lehnes (University of Freiburg)

1.1   Methodology – and its limitations

This study focuses on the potential role of heritage interpretation for a society under transformation.

It draws from several predecessor projects, publications which shaped the understanding of heritage interpretation as an applied discipline and discussions with experts and actors in the current international, mainly European discourse during and following the European Year of Cultural Heritage.

The most important predecessor projects for this small study:

- Real World Learning: this project contributed by linking the Schwartz' theory of basic human values to learning.

- HeriQ / Interpret Europe training programme: this (re)shaped the conceptual framework of Heritage interpretation in Europe (cf. also the chapter about IE's training policy, p. 39).

- InHerit: besides its contribution to the competence framework for the professional field of Heritage Interpretation (which is dealt with in a separate DELPHI output), this project began to reflect upon the essential meaning of 'meaning-making' based on Hannah Arendt'a philosophy of mind.

- HIMIS: this project developed an approach of co-creative heritage interpretation as a means to foster inclusion of secondary school students with different social and cultural backgrounds.

Discussions with the following persons shaped the perspective and approaches of the study: Walter Zampieri and Erminia Sciacchitano (European Commission), Francesc Pla Castelltort (Council of Europe), Paul McMahon (ICOMOS Comité international de la Formation), Matteo Rosati (UNESCO Regional Bureau for Science and Culture in Europe). Furthermore, active participation as invited panellist at the "Cherishing Heritage" Conference (organised by the EU Commission in Venice, December 2018) and Conference about "European Heritage: Shared experience and regional specificities" (organised by the Romanian Presidency of the Council of the EU in Sighișoara, April 2019) influenced had an impact on this study.

This research component is embedded in an applied Erasmus+ project which aims to further develop CPD instruments and test training modules which can be used for blended learning. The resources which can be used for basic research in an Erasmus+ are extremely limited, compared to other dedicated research programmes. However the close intertwining with concrete application opens up possibilities for exploration research and reflection.

The limited resources were invested in exploiting findings and perspectives from these sources in order to advance a conceptual framework which aims to be useful for those working in practice, rather than detailed documentation of interim results.

This study concentrates on a conceptual framework which allows to integrate the 'European' value dimension into an emerging approach of co-creative heritage interpretation planning. Its application is covered by the DELPHI training modules 2.1 to 2.4 (cf. the DELPHI toolkit)

1.2 Basic human values

Heritage is something which is considered worth to be remembered by us and to be preserved for future generations. Interpretation reveals why heritage is meaningful for people. Values play an important role in the field of heritage interpretation.

Values are highly abstract notions of what a person considers as good, desirable or important in life. They provide directions for decision making, they underlie attitudes and judgments. Values influence beliefs and they are influenced by beliefs. Feelings and emotions are triggered when values are activated.

Different values may be more or less important for different people. Everybody has probably experienced value conflicts. The values held and their relative importance form a part of each individual's personality.

Heritage interpreters and other adult educators should be aware of their own value priorities. Self-awareness is a precondition to consciously act and interact with other people in a responsible way when facilitating learning related to values.

The Real World Learning Network explored ways how we learn about the world around us and how science can help to change behaviours towards a more sustainable world.[1] They stressed the crucial role of human values for the transformation of societies. The value theory developed by Shalom Schwartz proved to be very useful. Together with Helwig's value rectangle it was introduced to heritage interpretation by Thorsten Ludwig and discussed within Interpret Europe (IE). The study "Engaging citizens with Europe's cultural heritage: How to make best use of the interpretive approach" (Interpret Europe 2017)[2] demonstrated that value-oriented heritage interpretation can use Schwartz's theory to address contemporary challenges for Europe. HIMIS tested the approach. The following section introduce and further develops the value theory in order to outline a conceptual framework for value-oriented heritage interpretation addressing the key aims of DELPHI.

What is a value?

"I define values as desirable trans-situational goals, varying in importance, that serve as guiding principles in the life of a person or other social entity.

Implicit in this definition of values as goals is that

    (1) they serve the interests of some social entity,

    (2) they can motivate action-giving it direction and emotional intensity,

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1   see the RWL website: https://www.rwlnetwork.org/rwl.aspx
    The RWL project was supported by the EU's Lifelong Learning Programme from 2012 to 2014.
2   The publication was IE's contribution for the European Year of Cultural Heritage 2018; the EU awarded the study with a first prize of its Altiero Spinelli Prize.

(3) they function as standards for judging and justifying action, and

(4) they are acquired both through socialization to dominant group values and through the unique learning experiences of individuals" (Schwartz 1994, 21)

Schwartz uses "goals" in a wide sense. Values deliberately encompass both desirable end-state of existence (ends in themselves) as well as preferred modes of behaviour (Schwartz 1994, 36) or desirable human traits (virtues) respectively (Schwartz 2012a, 16). [3]

1.3 Schwartz value survey

Values are generally deemed subjective. But can they serve as a common ground within a community or even between different cultures? This is a difficult but important question. Schwartz's research offers some valuable insights.

He and his research group developed and tested questionnaire with value items, both goals and virtues. Shalom Schwartz (2006, p. 15) explains:

"The SVS [Schwartz Value Survey] data were gathered between 1988 and 2002 from 233 samples from **68 countries** located on every inhabited continent (total N= 64,271). The samples include highly diverse geographic, cultural, linguistic, religious, age, gender, and occupational groups. Samples include those that represent a nation or a region in it (16), grade k-12 school teachers (74), undergraduate students from a variety of fields (111), adolescents (10), and adult convenience samples (22)."

They were all asked the following question and received the following list of items in their local language:

How important is each of the following items as a guiding principle in YOUR life?
Please look at all values first and rate the most import and the least important values. Then all value statements. The other values should be in between or equally important.
Please rate each value item on a scale from 7 (of supreme importance) to -1 (opposed to my values). 6 (very important), 5, 4 (between very important and important), 3 (important), 2, 1 (between important and not important), 0 (not important)

Value item	Brief description	Importance
A Spiritual Life	Emphasis on spiritual not material matters	
A Varied Life	Filled with challenge, novelty and change	
A World at Peace	Free of war and conflict	
A World of Beauty	Beauty of nature and the arts	
Accepting my Portion in Life	Submitting to life's circumstances	
Ambitious	Hard working, aspiring	
An Exciting Life	Stimulating experiences	
Authority	The right to lead or command	
Broad-minded	Tolerant of different ideas and beliefs	
Capable	Competent, effective, efficient	
Choosing Own Goals	Selecting own purposes	
Clean	Neat, tidy	

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3 For a discussion of common, defining features of "values" and distinctions between 'value', 'attitude, 'belief' and 'trait' cf. Schwartz 2012a)

Value item	Brief description	Importance
Creativity	Uniqueness, imagination	
Curious	Interested in everything, exploring	
Daring	Seeking adventure, risk	
Detachment	From worldly concerns	
Devout	Holding to religious faith and belief	
Enjoying Life	Enjoying food, sex, leisure, etc.	
Equality	Equal opportunity for all	
Family Security	Safety for loved ones	
Forgiving	Willing to pardon others	
Freedom	Freedom of action and thought	
Healthy	Not being sick physically or mentally	
Helpful	Working for the welfare of others	
Honest	Genuine, sincere	
Honouring of Elders	Showing respect	
Humble	Modest, self effacing	
Independent	Self reliant, self sufficient	
Influential	Having an impact on people and events	
Inner Harmony	At peace with myself	
Intelligent	Logical, thinking	
Loyal	Faithful to my friends, group	
Mature Love	Deep emotional and spiritual intimacy	
Meaning in Life	A purpose in life	
Moderate	Avoiding extremes of feeling & action	
National Security	Protection of my nation from enemies	
Obedient	Dutiful, meeting obligations	
Pleasure	Gratification of desires	
Politeness	Courtesy, good manners	
Preserving my Public Image	Protecting my 'face'	
Privacy	The right to have a private sphere	
Protecting the Environment	Preserving nature	
Reciprocation of Favours	Avoidance of indebtedness	
Respect for Tradition	Preservation of time honoured customs	
Responsible	Dependable, reliable	
Self Discipline	Self restraint, resistance to temptation	
Self Respect	Belief in one's own worth	
Self-Indulgent	Doing pleasant things	
Sense of Belonging	Feeling that others care about me	
Social Justice	Correcting injustice, care for the weak	
Social Order	Stability of society	
Social Power	Control over others, dominance	
Social Recognition	Respect, approval by others	
Successful	Achieving goals	
True Friendship	Close, supportive friends	

Value item	Brief description	Importance
Unity with Nature	Fitting into nature	
Wealth	Material possessions, money	
Wisdom	A mature understanding of life	

Several results are important:

- These value items were meaningful for all people on all continents despite the wide range of languages and cultures. Schwartz concludes that they these **values are** (near) **universal**. Could universal values be a suitable common fundament on which diverse people can unite? And what makes them diverse, if they share these values?

- The major difference is which values are deemed most and which ones least important. What matters is the **relative importance of a value in comparison to the other values**. And here are differences.

1.4 Values are interconnected to a value system

Schwartz and his team analysed these data seeking for correlations between the value ratings. They found out that individuals who rated a particular value very high are like to rate also other particular values high and another set of values low. Persons who hold e.g. "humble" in very high esteem, tend to esteem some others such as "honest" also high. The same persons are likely to hold values which are further away (e.g. "wealth" and "social power") in significantly lower esteem.

Schwartz and others then mapped these statistical distances between the value items using dimensional smallest space analysis.

The map shows a continuum but groups of value items which can be grouped togetherbut he highlighted that the lines between them are rather arbitrary.[4]

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4   In 2012 he proposed a refined classification which defines and orders 19 values on the continuum based on their compatible and conflicting motivations (Schwartz 2012b). However, the simpler version appears to be easier memorize and more suitable as a tool to provide orientation for interpretive planning and co-creation, when people need familiarise themselves quickly with the value system.
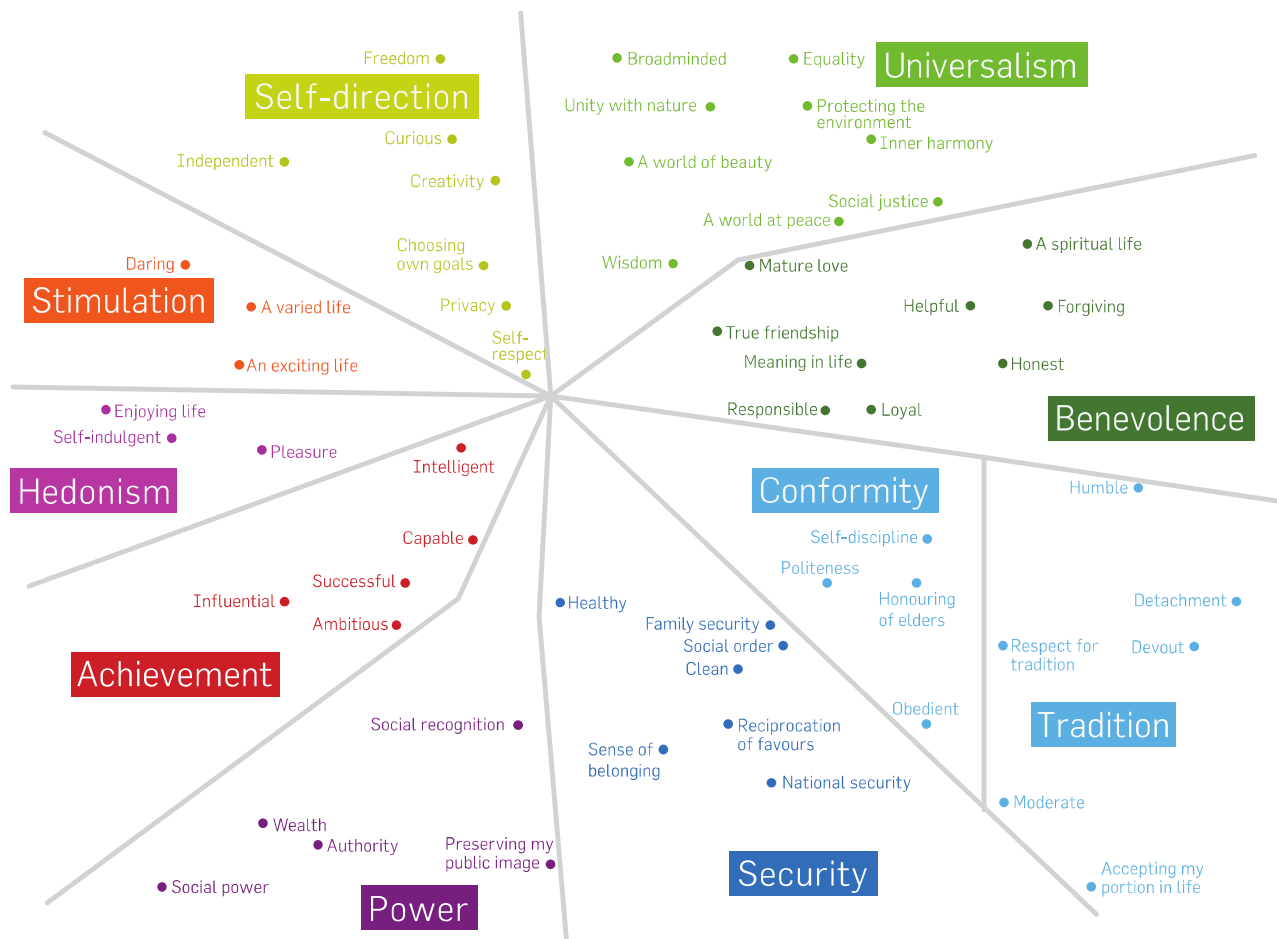
Fig. 1: Schwartz's value map (Interpret Europe 2017, based on Schwartz 2006)

Each of these groups can be characterised by a more abstract basic value (Schwartz 2006):

- **Universalism**: Understanding, appreciation, tolerance and protection for the welfare of all people and for nature
- **Benevolence**: Preservation and enhancement of the welfare of people with whom one is in frequent personal contact
- **Tradition**: Respect, commitment and acceptance of the customs and ideas that traditional culture or religion provide the self
- **Conformity**: Restraint of actions, inclinations and impulses likely to upset or harm others and violate social expectations or norms
- **Security**: Safety, harmony, and stability of society, relationships, and of self
- **Power**: Social status and prestige, control or dominance over people and resources
- **Achievement**: Personal success through demonstrating competence according to social standards
- **Hedonism**: Pleasure and sensuous gratification for oneself
- **Stimulation**: Excitement, novelty and challenge in life
- **Self-Direction**: Independent thought and action – choosing, creating, exploring

Reflection on own and other people's value priorities

The DELPHI pilot course asked participants to rate their value preferences online using the Schwartz instrument. The result revealed that group tended to rate universalism values highest in relation to other values. Power, security, tradition and conformity values were rated relatively low.
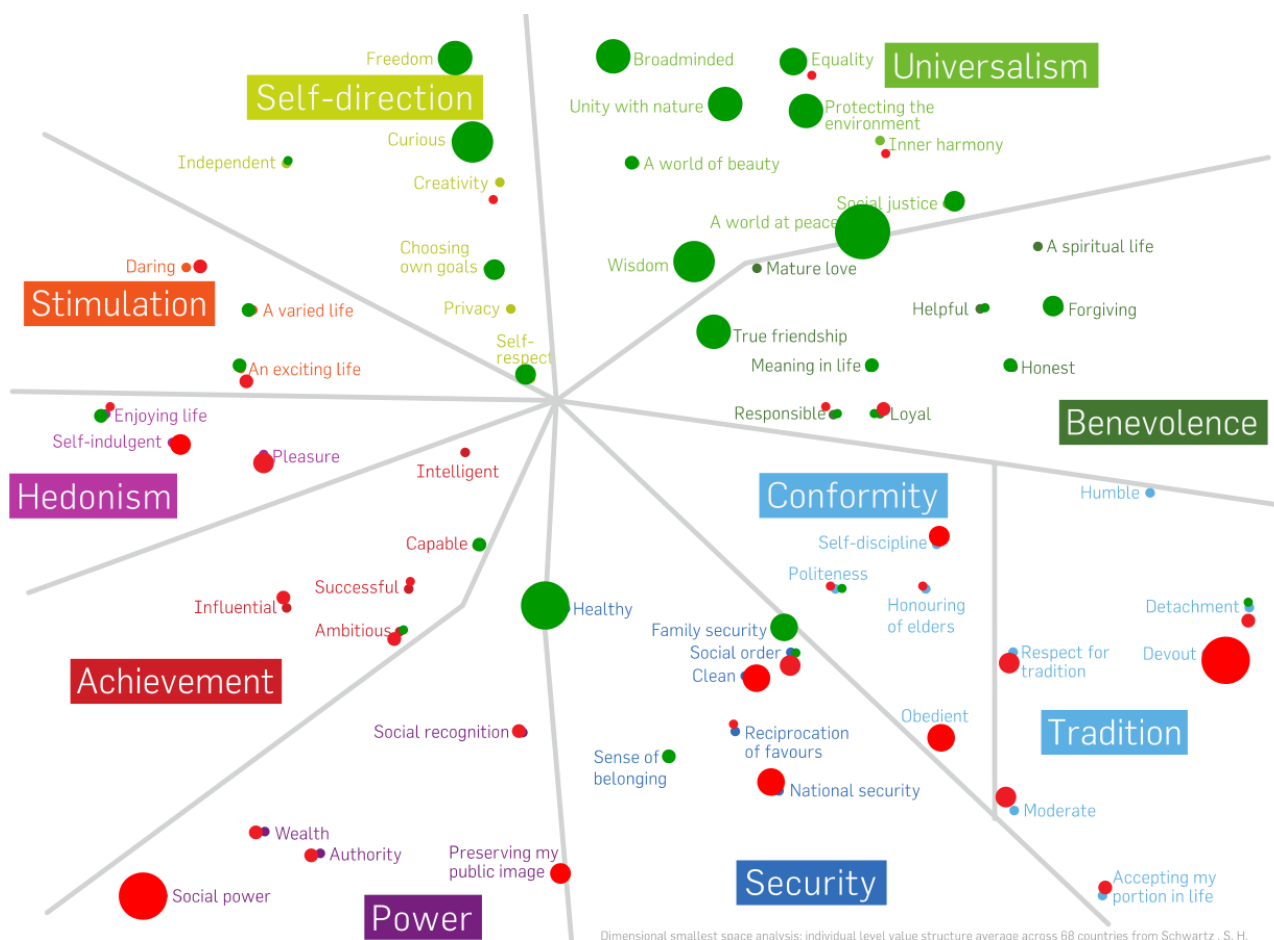
Fig. 2: Value preferences of the participants of the DELPHI pilot training: The map shows which value items were rated as most important (green), i.e. they deviated at least 30% from an individual's average rating. The size of the dots reflects the number of positive deviations within the group. The red dots indicate a negative deviation of at least 40% of an individuals average rating.

This result was expected. Participants who sign up for a European training about fostering more inclusive societies should prioritise universalism values. But other people with other social or cultural backgrounds might have different value preferences.

During the in-person training participants then engaged in role plays, imagining and discussing which value items they might rate most important if they had a very different background belong to other socio-cultural milieus (middle management business person with lots of travel experience; member of a rural community who prefers package holidays; second or third generation student from a migrant community who feels excluded in the host society and feels an urge 'back to the roots').

A role play can be an approximation to experiential learning:

- to experience that the value priorities of various target groups (visitors and stakeholders, participants in a planning and co-creation process) may significantly differ from those held by oneself.

- to understand that for interpretive planning it is important to know the target groups (as well as those visitors who come anyway) and to understand what is important or sensitive for them. This requires knowledge of their social and cultural backgrounds.

This exercise should be followed by a reflection on stereotyping. During the pilot test, a student asked whether this role play was an exercise in stereotyping. Such an discussion can reveal that everybody holds stereotypes; this is more or less inescapable. At the same time, empirical research shows that differences in value priorities, attitudes, beliefs etc. exist between different (sub-)cultural groups etc.

Interpreters and adult educators need to be aware of such real differences, but at the same careful to avoid undue stereotyping. This requires

- openness towards each individual and

- to expect that an individual may not share a general tendency which is attributed to a group to which he or she appears to belong, and

- caution that one's own understanding of a socio-cultural group might be tinged by undue stereotypes, bias or cliché.

1.5 'European' values

In which respect does it make sense to refer to values as 'European' values? According to Schwartz' empirical studies, values such as freedom, equality, social justice which are often associated with 'European' values, are in fact universal. They are also important for people living outside Europe and, arguably, they were not 'invented' in Europe alone.

But the Treaty on European Union provides a different approach. Article 2 states that the EU is founded on

"...the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. These values are common to the Member States in a society in which pluralism, non-discrimination, tolerance, justice, solidarity and equality between women and men prevail."

This does not imply that those values are specific to Europeans nor that they originated from Europe. Some of those values 'European' values highlighted in article 2, such as democracy, were not included in Schwartz's value survey because they are not universal. It is, however, possible to estimate their position on the map according to their logic-semantic relation to the basic values:

Democracy is about self-direction and about equal rights of voting;

Solidarity at the level of the EU transcends the area of family, friends and other people with whom one is in frequent contact, but is closely related to 'Benevolence'. Hence the positioning between benevolence and universalism values. All European values tend to towards universalism.

These additions are however not backed by Schwartz's empirical data, but by logic-semantic inference.

Fig. 3: 'European' values (article 2 TEU values) placed on Schwartz's value map; Note: the is an approximation based on the logic semantic relation to the values of universalism self-direction and benevolence, while the other values are mapped based on empirical data and statistical analysis.

It is important to understand the difference between universal value and universalism values:

- **Universal values** are meaningful values for (nearly) all humans. Security and power are also universal values.

- **Values of Universalism** are values that refer beyond oneself or one's in-group, tribe or people; the include all humans: such as human dignity, equality.

This distinction between 'universal values' and 'values of universalism' is sometimes confused.Because universal values are shared more or less by all, regardless of social or cultural difference, they can form a common ground for common understanding, e.g. when heritage interpretation seeks to address a culturally highly diverse audience so that people can relate to it in a meaningful way. .

The 'European values' of universalism are especially important for social cohesion beyond one's in-groups, social affiliation or national identity, as a unifying element on a culturally diverse continent. Self-transcending values build the common ground for social cohesion. The EU is literally 'founded' on those values. These values are of crucial importance for a community which aims to become **'united inn diversity'.**

Without them, the fundament of the Union would be endangered. If this value fundament becomes too weak, then European societies and the EU itself are at risk to fall apart.

Consequently article 3 (TEU) which lists the common aims of the Union refers at first again to these values: "1. **The Union's aim is to promote** peace, **its values** and the well-being of its peoples."

1.6 The value compass

Schwartz's theory of basic human values discriminates among value types, but at a more basic level values form a continuum of motivations which is structured by two polarities. He observed that competing value types emanate in opposing directions from the centre; compatible types are in close proximity going around the circle. It is this continuum that gives rise to the circular structure (1994, 24f).

Values are structured in a circle of conflicts and compatibilities, such that adjacent values in the circle are theoretically compatible and empirically positively related, and values on opposite sides of the circle are theoretically conflicting and empirically negatively related (Borg et al. 2015).
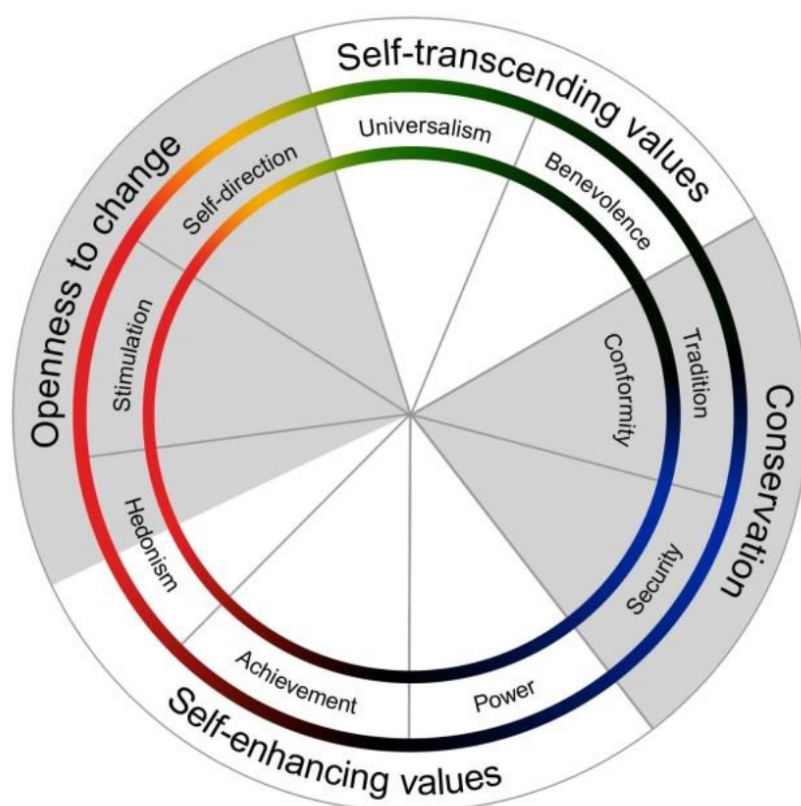
Fig. 4: The value compass: The oppositions between competing value types can be summarized by viewing values as organized in two bipolar dimensions (illustration by IE 2017, based on Schwartz 1994, 24)

This circular structure may be called a '**value compass**'.[5] The 4 'motivational directions' provide orientation within the complex landscape of values, similar to the four cardinal directions (North – South, East – West) of a compass.

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5   A term which Schwartz apparently never used, maybe for a good reason. But the analogy with a compass providing orientation about the direction of activity may be helpful in heritage interpretation and transformative research.

Schwartz explains the role of value activation (2006):

> "Values affect behavior only if they are activated (Verplanken & Holland, 2002. Activation may or may not entail conscious thought about a value. Much information-processing occurs outside of awareness. The more accessible a value, i.e., the more easily it comes to mind, the more likely it will be activated. Because more important values are more accessible (Bardi, 2000), they relate more to behavior.

> Value-relevant aspects of situations activate values. A job offer may activate achievement values and a car accident may activate security values. Even coincidental increases in the accessibility of a value, say by coming across value-relevant words in a puzzle, increase chances it will be activated. If it is a high-priority value, it may then lead to behavior. Focusing attention on the self may also increase value-behavior relations because it activates values that are central to the self-concept, values of high importance. Verplanken and Holland (2002) demonstrated these effects in experiments where they manipulated the accessibility of values in one study and self-focus in another. Activation experiments are particularly important because they show that activating values causes behavior."

It is obvious that heritage interpretation which is meaningful for people almost inevitably activates values, enhances their accessibility and influences their attitudes and behaviour.

Furthermore, if a value is activated then the whole region of familiar values is activated. This is called "spill-over effect" (IE 2017, 19). Triggering values on one side of circle will also result in a lower weight of the antagonistic values on the opposite side of the circle. This is called the seesaw effect.

There is plenty of evidence that trying to persuade people to do something good beyond self-interest (e.g. for refugees or the environment) through appealing to self-interest (e.g. monetary incentives or appeals to prestige) can result in a backlash.

Example: "A referendum was to be held in Switzerland to decide where toxic waste sites should be located, and two researchers carried out a number of large surveys of whether people would be happy to have the waste sites near their own communities. The population was very well informed, and were aware of the risks involved. When the offer of compensation was suggested, 25% of people said yes; without the offer, 50% did. These striking results led the researchers to conclude that thinking about civic responsibility alone was a stronger incentive than thinking about civic responsibility plus money: two motivations which appeared to compete, rather than complement. The intrinsic motivation was clearly present, but the extrinsic focus suppressed it." (PIRC 2011, p. 60)

The value compass provides valuable orientation for heritage interpreters, adult educators and transformative researchers. The value compass and value map are useful tools to answer the guiding questions:

- Does an existing interpretations resonate with values? Which ones?
- Do interpretations tend to strengthen values of universalism and freedom ('European' values)?

    Recall: These are the values which are fundamental for a society which aims to become "united in diversity".

They should be promoted according to the EU, Council of Europe, UNESCO and UN (Universal Declaration of Human Rights). Constitutions of most states also refer to these values of universalism and freedom.

- Do interpretations activate and tend to strengthen values of power and achievement?

Values of power and achievement are also values, i.e. in principle positive. For example, activists or civil society organisations need to engage with power in order to improve laws aiming to overcome inequality, discrimination or injustice. But if values of power or achievement become too dominant in a society in relation to values of universalism and freedom, then they tend to foster division and exclusionary attitudes, which threaten to undermine plural and democratic societies.

Simple activation of values through framing interpretations in terms of power and achievement tends to strengthen these values. However, a lot of heritage interpretation of historic sites is doing just that, focussing on the most powerful leaders and successful personalities in history.

- Could alternative interpretations of such sites activate different values?

1.7 The value rectangle

The value compass is a very helpful tool for the analysis of and orientation within value systems. But it misses one important aspect: the role of non-values within a value system. In this respect, the value rectangle can be important. It is depicted in Interpret Europe's 'Engaging Citizens' study and appears immediately pertinent. But its application for heritage interpretation the has not been elaborated yet.
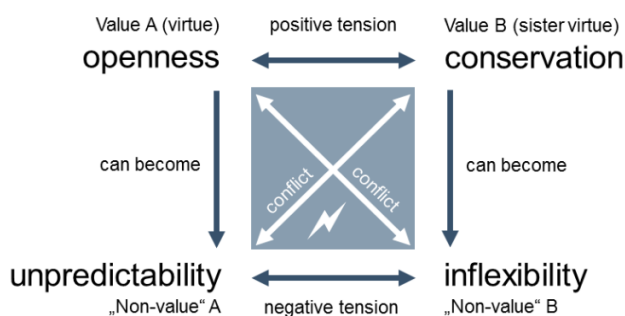
Fig. 5: Values can become non-values (IE 2017, based on Helwig 1965)

A non-value may be defined in analogy to a value:

In contrast to values, non-values are *negative* guiding principles of what to avoid, repudiate or disavow.

Similar to values, non-values are

- abstract, trans-situational criteria for
- judgements and decision making

- varying in importance
- linked to feelings and emotions

The DELPHI pilot training introduced this idea, and at a first glance students found it inspiring for their work. However, the mentoring revealed that it was difficult to use it for their case studies.

The rectangle is confusing because values which are polar opposites on the value compass, are called 'sister' virtues.

To be useful, both theories of Schwartz and Helwig need to be combined. This is possible if Helwig's value rectangle of positivity and negativity is imagined perpendicular to the plane of the value circle (cf. Fig. 6).

Human value systems hence encompass two fundamentally different opposites:

1. between **values and non-values**

   which point to opposite directions from neutral (indifferent or lacking a value dimension) to increasingly positive (desirable) or increasingly negative (undesirable)

and

2. between opposite directions on the value compass or value map;

   which create a **bipolar (or multipolar) field of motivational directions**.
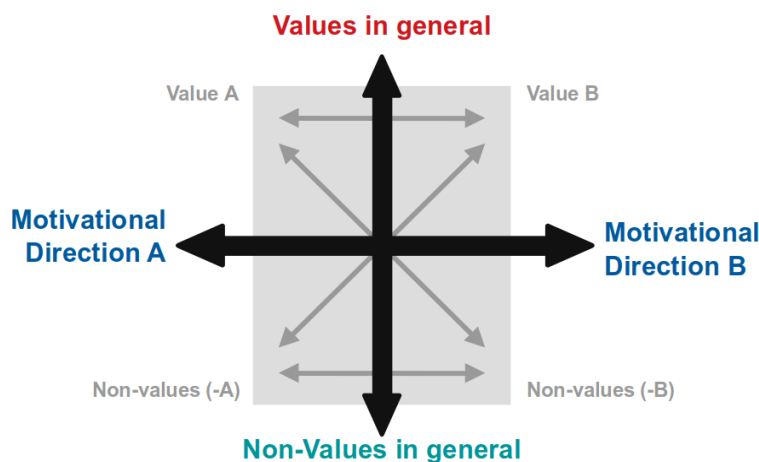
Fig. 6: The value circle (here in a cross section cutting through the circle opposite motivational directions) combined with the value rectangle.

A further developed version of the value rectangle can then describe the relations between different opposites to a value A as a complimentary opposite between two values which are both positive, and its relation to its adversarial (diagonal) opposite.
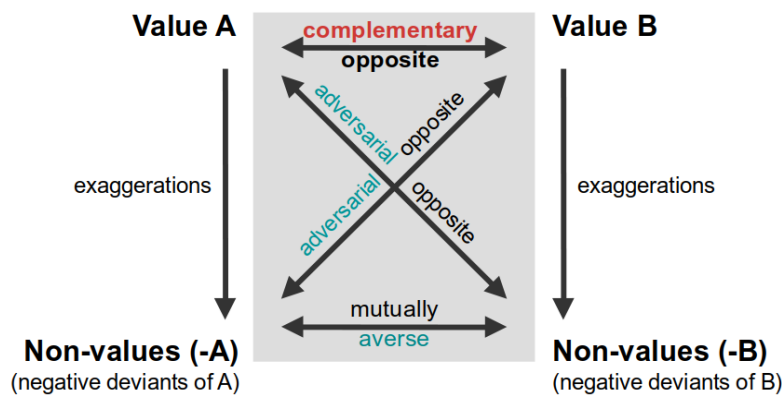
Fig. 7: Value rectangle as an analytical tool.

With a coherent value system, there is **no conflict** between a value and its opposite non-value. If the opposite is negated as a non-value then it is consistent with the original value.

This becomes clear if we explore what happens within such a system, if one value (or set of closely related values) becomes more dominant. How does the value rectangle change?

Increasing predominance of one side has effects on the opposite side's non-values: As the counter-value of B, (i.e. A, openness-to-change) loses weight, its non-value deviants (-A, unsteadiness, carelessness etc.) become more salient. Situations or arguments that would previously have resonated with the openness-to-change values might now more often be framed and judged as unsteadiness or carelessness (see (fig. 8).

By the time, the counter-value (A) itself might be more closely be associated with its familiar non-values. This is correlated with the loosing importance value of that value and might explain the seesaw effect.

And for the non-value deviants (-B) of the increasingly dominant value, the opposite tends to happen.
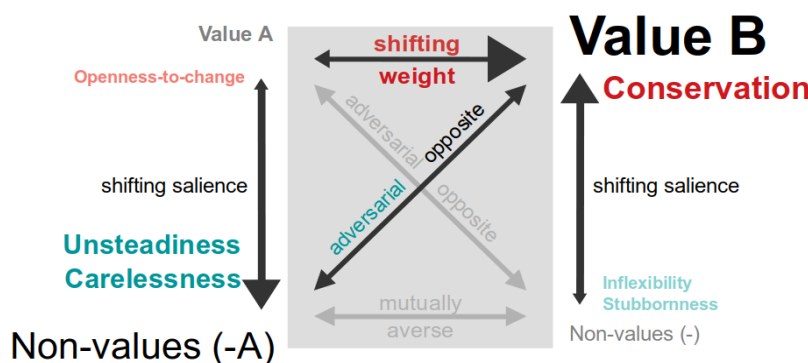
Fig. 8: Shifting weight to a predominant value in a value system

Non-values (-B, inflexibility, stubbornness etc.) linked to the increasingly dominating value B (conservation) become less salient within this person's internal value system. A dominating value will hardly ever be associated with or critically examined against its non-value deviants.

Within a coherent value system, everything is intertwined. All of these relations allow the dominant value to trump increasingly often over its opposite – even in situations when the benefit for the "winning" side is rather small compared to the trade-offs on the opposite side.

In the extreme such a shift of weight to one side can lead to various kinds of uncompromising radicalism, extremism or fundamentalism which put one (set of) value(s) as absolute.

This could also happen to with openness-to-change (A). E.g. a hypothetical group that feels most progressive - probably in combination with another dominant value sector depending on where they seek radical change, e.g. technological innovation or social justice. It this value becomes absult, then the counterbalancing value fades away.

Conflict appears when a value gains (absolute) dominance and a split between self-perception and perception of opponents occurs. Self-perception tends to be positive, and the perception of the opponent turns increasingly negative.
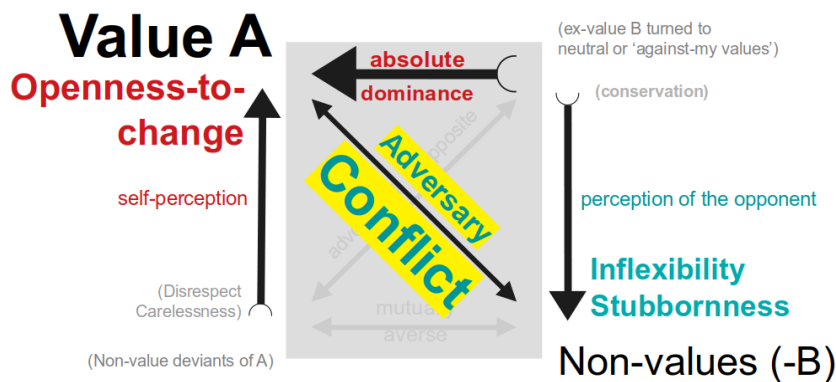
Fig. 9: An absolute value eradicates inner value tensions. The opponent is perceived as adversary and any criticism can be deflected by attributing non-values to the opponent.

This conflict is not an incoherence <u>within</u> a consistent value system, but it occurs **between people** who hold <u>different value systems</u> with different preponderant or absolute values. In this respect, figure 5 is unclear and confusing, as it does not differentiate between system immanent considerations and relations between people and their differing value systems.

1.8   Conclusions

For European societies aiming to become '**united in diversity**' an absolutist value system is problematic.

Diversity involves a range of different values preferences and world views. 'European' values in themselves are sometimes in tension as they include respect human rights, freedoms of religion, of opinion and expression (all of which may embrace different value systems), but also solidarity,

democracy etc. At the same time they are striving for sustainable development which encompasses to task of integrating and balancing environmental, social and economic concerns.

European societies need to permanently balance and re-balance competing values, which are of varying importance for socially and culturally divers groups.

This is evident for seemingly paradox goals such as

- embracing diversity while seeking unity
- trying to square the circle by balancing the different concerns and interests when making concrete decision about trade-off while aiming for sustainable development
- cohesion of a liberal, plural democracy based on the ability to find and accept compromise

Absolute values which all but erase opposite values - and deflect underlying concerns to non-values - are **incompatible** with such societies.

For the European ideal of a society which is 'united in diversity' (including all the linked and sometimes competing values which need to be balanced) to function...

- ...its members need to embrace self-transcending values as those values transcend the own in-group and embrace all humans,
- ...plus, most crucially, they need to be able to cope with **ambivalence**

These are tasks for personal development and for transformative education that facilitates learning for personal development.

Multiple perspective interpretation offers opportunities in this regard which are largely untapped.

The value theory provides an analytical framework for co-creative heritage interpretation planning. It can be useful for

- the analysis and exploration of perspectives and values activated by existing interpretive offers, and to explore alternative interpretive plots and narratives,
- the analysis of belief systems and values which motivated different actors in history, and to identify ambivalence in history which could be used for interpretation,
- the analysis and exploration of present day heritage site visitors, i.e. target groups for whom the planned interpretation should be meaningful, enriching and provoke reflection about values and ambivalence,
- to provide guidance for interpretive facilitators of co-creation projects who inspire learning processes in social-culturally diverse community and stakeholder groups.

Based on these finding DELPHI modules 2.3 and 2.4 propose tools for the practice of multiple perspectives interpretation and co-creation.

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2 Heritage Values in Europe and the Council of Europe's Framework Convention on the Value of Cultural heritage for Society (Faro 2005)

by Sarah Wolferstan (UCL)

2.1 Introduction

Heritage Values

"The essential narratives and values of heritage places are rarely, if ever, singular"

(Avrami 2019:7)

The assessment of the values attributed to heritage is a very important activity for heritage managers and conservation specialists, since values strongly shape the decisions that are made. Avrami and Mason's recent analysis of evolving trends and emerging issues suggests that heritage management "is characterized by two distinct, complementary perspectives: one centered on heritage values (associated with the curatorial, materialist traditions of conservation practice) and the other on societal values (focused on the economic, political, social, and environmental uses of heritage). Integrating these different yet interdependent views can advance learning and self-critique within the professional field and inspire more sustainable and inclusive practices of conservation" using "participatory heritage management processes that give voice to a range of stakeholders, including those beyond the realm of heritage experts (from other disciplines as well as nonexperts)." [6]

Heritage managers use value assessments to understand the full range of values and valuing processes attached to heritage, as opposed to the normative, art historical view that has been so common in the conservation field to date.[7] In this context, a 'value' is simply an aspect of worth or importance. They are not inherent to a place or the expression of intangible cultural heritage. Different people, and groups, may therefore associate different 'heritage values', sometimes conflicting values, to the same place. Many frameworks that have been put forward to rationalise and systematise the reasons why people value places as part of their cultural heritage; the table[8] below summarises a few of them. They are necessary to underpin both legal decisions for the protection of heritage, and professional or ethical decisions about how best to conserve its values for present and future generations and show a shift towards social values.

Some protection systems claim that all objects and sites of a certain age are of public interest, or collective value, and are thus protected by law, even if they are yet to be discovered, but most protection systems tend to use long-established art-historic values, as in Article 1 of the Council of Europe's Convention concerning Architectural Heritage (Granada 1985), which states "all buildings

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6   Avrami, E et al (ed): Values in Heritage Management: Emerging Approaches and Research Directions (2019)
     https://www.getty.edu/conservation/publications_resources/books/values_heritage_management.html
7   De la Torre, M (Ed) *Assessing the Value of Cultural Heritage* (2002)
8   Table based on Mason in De la Torre (Ed) *Assessing the Value of Cultural Heritage* (2002:9) with additions and deletions, and re-arranged to facilitate comparison. Additions are John Vanbrugh's letter to the Duchess of Marlborough, 11 June 1709 (pleading for the preservation of Woodstock Manor), from *The Complete Works of Sir John Vanburgh*, (**4**, 1928:29) and *Conservation Principles, Policies and Guidance for the sustainable management of the historic environment* (English Heritage, 2008).

and structures of conspicuous historical, archaeological, artistic, scientific, social or technical interest, including their fixtures and fittings" to justify the specific protection of architectural heritage. Granada, in including 'social' value, recognised the trend towards a wider range of values influencing conservation management decisions, both of formally protected sites and in spatial/landscape planning.

Vanbrugh 1709	Riegl 1903	Lipe 1984	CoE Granada Convention 1985	ICOMOS Burra Charter 2004	English Heritage 2008
'remains of distant times'	Age		Archaeological		
		Informational	Scientific	Scientific	Evidential
			Technical		
Historical association (people, events)	Historical	Associative-Symbolic	Historical	Historic	Historical -Illustrative -Associational
'Magnificence' 'Curious workmanship'	Art Unity	Aesthetic	Artistic	Aesthetic	Aesthetic -Design -Artistic -Fortuitous
'extraordinary occasions' [of erecting buildings]	Intended memorial value	Associative-Symbolic	Social	Social Spiritual	Communal -Commemorative -Symbolic -Social -Spiritual
		Economic			Instrumental, eg -Economic -Social -Educational
	Use				Utility

A distinction is often drawn between the 'heritage' values of places and 'instrumental' benefits or values for society which may flow from them, for example economic (the public value of making places desirable to live/work/visit), environmental or educational; but some 'communal values', related to social identity and cohesion, may blur the boundaries.

In general there is no consistent or deterministic relationship between the 'heritage' values of a place, particularly a building or structure, and its utility, often reflected in its market value, which in turn may not reflect even its wider economic (and non-economic) value to society. An increasing emphasis on the 'instrumental' values of heritage can be beneficial in making best use of a public resource, but brings the risk of prioritising heritage primarily on the basis of its potential to generate incidental benefits, rather than for example, its architectural or scientific values, which may be sidelined as a result. A range of economic and qualitative approaches are used, depending on the nature of the enquiry.
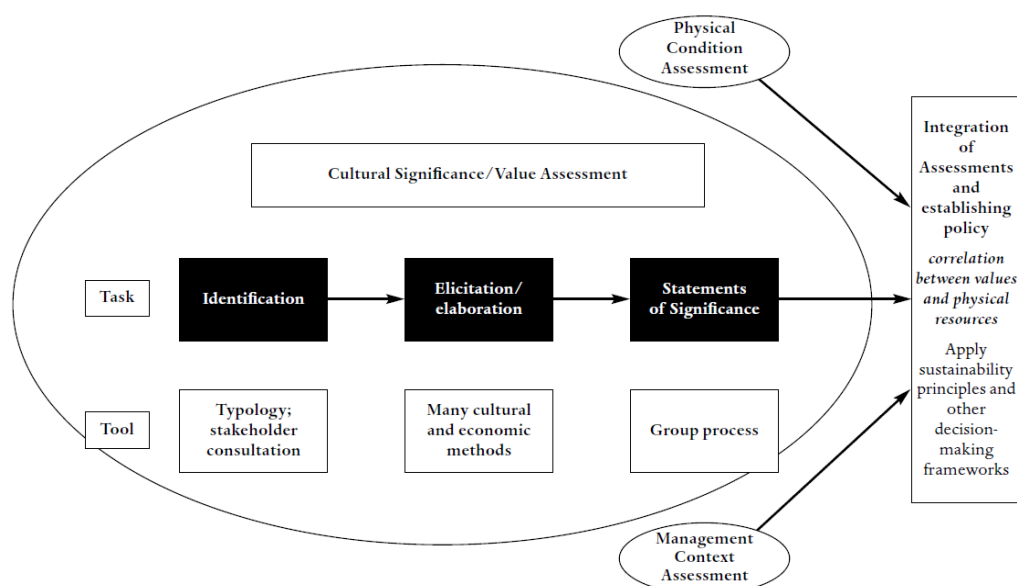
Figure 1: The cultural assessment / value process as the central part of conservation and management planning (Mason, 2002)[9]

Heritage workers use these value assessment methods – using participatory tools adapted to the task – to produce Statements of Significance, Conservation Management Plans, Heritage or Conservation Statements, to allow things that were once taken for granted, or stated as obvious truths, to become the subject of critical analysis, and make the stewardship of long-established values transparent in our attempts to reconcile their management alongside contemporary and instrumental uses. If used to establish indicators and monitor values over time, they provide a less subjective resource for resolving tensions in negotiation and decision-making, especially given the increasing need to consider change in light of other public priorities.

The latest standard to emerge from the Council of Europe, the Faro Convention on the Value of Cultural Heritage for Society, departs from this technical focus on identifying and balancing heritage values with social, communal and instrumental values. It aims to "democratise the valuing process: heritage cannot easily be restricted to "official" actions or laws. It includes the most basic and egalitarian processes of a person's being and becoming in the world. Expert, official or orthodox ways of seeing or valuing heritage remain valid but they are now set increasingly against all the other plural ways of seeing and acting. Some of these other value systems may not be scientific or objective, but they can still be part of this wider heritage. This system relies on a functioning democratic heritage process, as is also recommended in the framework convention."[10] Before we discuss the importance of this normative document to Europe's cultural sector, it is first worth discussing its origins.

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9   Mason in De la Torre (Ed) *Assessing the Value of Cultural Heritage* (2002:7)
10   Wolferstan & Fairclough, G (2013) Common European heritage: reinventing identity through landscape and heritage? In, Callebaut D Mařík, J; Maříková-Kubková, J (eds.) Heritage Reinvents Europe European Archaeological Council / Archaeolingua pp 43-54

2.2   The Council of Europe, its work and the role of heritage

Founded in 1949, the Council of Europe (CoE) seeks to develop throughout Europe common and democratic principles based on the European Convention on Human Rights and other reference texts on the protection of individuals. The intergovernmental organisation is financed by its 47 member states and famous for its European Court of Human Rights in Strasbourg. Its core mission is to protect human rights, pluralist democracy and the rule of law, by promoting political, legislative and constitutional reform.[11]

Although a normative text, it has a clear ethical, moral call at its heart. The organisation was linking all of its work to its founding Human Rights mission, as the importance of the European Convention for Human Rights, and its Human Rights Court grew across the wider European family of 47 member states. Social critiques have called for international organisations to take a positive moral ethical position in striving for social justice in Europe.[12] Cultural Heritage is part of the global post-modern debate, described by Huyssen as a shift in paradigm of European cultural memory "that can no longer be safely secured along the traditional axes of nation and race, language and national history".[13]

The CoE approach is not academic or comparable to the activities of professional bodies like ICOMOS, although the latter is an official observer. Rather its activities aim to transform such shifts in paradigm into political and administrative strategies for the day-to-day work of public authorities. Following the 1996 Helsinki conference of European Ministers responsible for Cultural Heritage organised in response to the destruction of cultural heritage during conflicts in former Yugoslavia, the ministers called for strategies that put heritage into the heart of sustainable development. The final declaration of the next inter-ministerial meeting, in 2001 (Portorož - Slovenia) spurred the COE's Committee of Ministers to give terms of reference to a select group of heritage professionals to draft a convention on cultural heritage as a development resource. It needed to reflect the Council's human rights approach, and complement the cultural convention, as well as the specific cultural heritage conventions:

- Protection of Architectural Heritage, Granada 1985; which widened the notion of architectural heritage from single monuments to areas and the development of the principle of "integrated conservation".

- Protection of Archaeological Heritage, Valletta 1992; which sets out good practice in the archaeological sector (e.g. standard setting, dealing with illicit trade, archive and storage regulations) and emphasises the public value and interest in heritage.

- European Landscape Convention, Florence 2000; the importance of local identity and the public's role in identifying and assessing landscape as part of management planning (entire territory, not just outstanding landscapes).

2.3   In detail: The Framework Convention on the Value of Cultural Heritage for Society

Some four years after Florence, after consultation with heritage professionals and lawyers in 47 member states, who wrangled over each and every word, the framework convention was opened for signature in Faro, Portugal in 2005. It is different from an ordinary convention as 'framework'

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11   http://www.coe.int/T/e/Com/about_coe/

12   Derrida, J. 'Globalization, peace and cosmopolitics' In Binde, J., Verity, B. Corbett, J. *The Future of values: 21st century talks* (2004) Berghahn. p120

13   Huyssen, A. *Twilight Memories: Marking Time in a Culture of Amnesia* (1995) Routledge p.9

indicates that the principles contained in the instrument are not directly translatable into the domestic legal orders of the Member States. They will have to be implemented through national legislation and appropriate government policies by using the framework as a high-level platform for international collaboration and intergovernmental co-operation.

Section 1 sets out the conventions aims and principles. The Framework Convention has been called "an anthropocentric heritage ideology" as it is primarily about people, not artefacts".[14] It puts **people's values not fabric** first. Heritage is defined as "a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions". Theorists have criticised international conventions for imposing western definitions of culture and identity; however, as Rowland's commented, by "defining cultural property as a right," heritage has become recognised for its role in "reproducing social relationships" a process that is then managed for the benefit of the public interest, rather than simply assuming it is "simply an accumulation of things."[15]

It refers to a **Common European Heritage**, but is creating an cultural-historical ideological imposition; a shared past of Charlemagne or the Early Bronze Age, nor for that matter, a shared history of democracy or the enlightenment. It is not about a unified identity, a particular period or type of heritage. It is about political and social ideas in the present that are used as resources for democratic engagement. It does not advocate that these concepts be extended back in time and influence our interpretations, but rather that they influence our approach to interpretation. Whether it is interpreted as cross-border heritage, the right to cultural diversity, a shared responsibility for all heritage, or a troubled past of dissonant and difficult memories: it should be managed as a whole rather than in terms of parallel aggressive competing nationalisms. Research in Kosovo led me to argue that such strategic essentialism has its benefits for both populations and heritage.[16]

The most striking thing about the convention is its reference to **Heritage community**: This definition draws on Kevin Robins' cultural policy study; "The challenge of transcultural diversities" which argues that recent trends concerning diversity have "made it possible to see difference and complexity, no longer as problematical phenomena, but actually as a positive asset and resource for any cultural order".[17] These communities may be multinational (like the International and European Archaeological communities of the World Archaeological Congress, the European Archaeological Council and the European Association of Archaeologists.) Thus it is not restricted to minorities but rather communities of interests. This moves from the traditional elitist conservation philosophy in which experts and civil servants have the power, to a shared responsibility context (as described in section 3).

Section 2 concerns the contri**bution of cultural heritage to society and human development.** Articles 7-10 are about rights to heritage, values, and sustainability[18] and integrating heritage into all spheres of public life. It centres the **ideas of human rights, dialogue, quality of life**: 'everyone, alone or collectively has the responsibility to respect the cultural heritage of other as much as their own heritage'. Thus, heritage authorities and public bodies should have a code of

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14 Myklebust, D., 'Council of Europe Framework Convention on the Value of Cultural Heritage for Society.' In 'Proceedings of the Vilnius conference'

15 Rowlands, M. 'The Power of Origins: Questions of Cultural Rights', In, Buchli, V., *The Material Cultural Reader* (2002) Oxford: Berg Publications p.111-134

16 Wolferstan (2006) Undertaking a heritage ethnography in Kosovo. Papers of the Institute of Archaeology, UCL, 17, pp.100-109

17 Robins, K (2006) Towards a Transcultural Policy For European Cosmopolitanism. Transcultural Europe pp 254-283

18 Section 2: dialogue (Art. 7); the environment, heritage and the quality of life (Art. 8); Sustainable use of cultural heritage (Art 9); cultural heritage and economic activity

ethics for participation in heritage decision making. They should also be held accountable for setting up methods for participating in heritage. The most obvious way to facilitate participation is the statutory consultation as part of the planning process (by which I mean the state managed system behind permissions to build/develop/change an public or private asset). Another, for UNESCO sites / nominations, is an obligation in the nomination process to include communities in the process of writing the management plan, and in updates of management plans, to include community value assessments – and a social economic impact of the site that is community orientated. However, for non-protected heritage, the tools are as varied as the publics we wish to engage, and include seeking views for heritage and conservation statements and plans through for example, REAP (Rapid Ethnographic Assessment Procedures) methodology. This is a tool kit of ethnographic methods that systematically combines interview, observation, and documentary search techniques to describe fully the way of life common to a group of people, including their knowledge, customs, beliefs, social habits, technology, arts, values, and institutions.

The convention places heritage values at the heart of **sustainability**: setting out clear arguments for persuading governments, territorial planners, developers, educational theorists, to take cultural heritage issues into their new laws and policies because they add value to their own sectors - not just because they are 'doing a favour for the heritage people'.[19] Influenced by ICOMOS Australia's Burra Charter, here Faro is developing the idea of instrumental values - positive social or economic consequences of heritage.

Section 3 concerns shared responsibility for and access to cultural heritage and public participation (Articles 11-14).[20] These articles require that public authorities should develop legal, financial, and professional frameworks so that different sectors / actors can co-operate in cultural heritage management (public-private partnerships / NGOs / civil society). This relates to the above mentioned definition of "heritage communities".

This cooperation is set out clearly in Article 12; public authorities should support participation in "the process of identification, study, interpretation, protection, conservation and presentation of the cultural heritage" by encouraging "public reflection and debate on the opportunities and challenges which the cultural heritage represents" and "take into consideration the value attached by each heritage community to the cultural heritage with which it identifies". They can do this by recognising "the role of voluntary organisations both as partners in activities and as constructive critics of cultural heritage policies;" taking "steps to improve access to the heritage, especially among young people and the disadvantaged, in order to raise awareness about its value, the need to maintain and preserve it, and the benefits which may be derived from it."[21]

With its emphasis on **shared responsibility**, the convention makes a distinction between the identification of heritage resources by "heritage communities" and the recognition by the appropriate public authorities of a public interest justifying listing and funding. Thus, groups of people can co-operate to save heritage (whatever it might be, and whether or not it is legally protected – from industrial sites to maritime or underwater sites to cars to culinary traditions, anything that they value, is part of their beliefs, traditions....). Through its project on 'Cultural identities, shared values and European citizenship' the CoE produced a European Manifesto for multiple cultural affiliation and a handbook on values for life in a democracy[22]. These resources can

19 Fojut, N., (2008) Council of Europe Framework Convention on the Value of Cultural Heritage for Society, In, *Proceedings of the Vilnius conference*. (Publication pending.2008) p43

20 The integration of cultural heritage into other areas of knowledge (Art. 13) through education; (Art 14) through the information society.

21 https://www.coe.int/en/web/conventions/full-list/-/conventions/treaty/199

22 https://publicsearch.coe.int/#k=multiple%20cultural%20affiliation#f=%5B%5D

support heritage communities in their educational projects, as well as for participating in European level projects such as Cultural Routes, European Heritage Days, the Faro Network, and the Intercultural cities projects.

2.4   Conventions: useful or useless?

Faro was opened for signature in late 2005, and came into force with its tenth signature in 2011. With Italy's recent ratification, the Faro Framework Convention has reached 19 ratifications, with a further 6 states taking the preliminary step of signature.[23] Counting ratifications is not the only way of judging the success of a convention; the extent and quality of the influence of its ideas is perhaps more important.

At the organisational level, Sections 4 and 5 of the convention set out the parties' monitoring responsibilities and this provision, part of all CoE conventions, has allowed the organisation to provide technical support to governments in SE Europe and the Caucasus concerning the preparation of new laws to support the implementation of all of the CoE Heritage Conventions.[24] This work is carried out by the heritage division's team running its monitoring system and network of heritage professionals (known as the Herein Network)[25] as well as its technical team, who work on trans-frontier technical activities, one such example was the EU/CoE joint funded project "Support to the Promotion of Cultural Diversity in Kosovo".[26]

In recent years, the organisation's Faro Network and its operating document, the Faro Action Plan, have brought practical examples of the Convention at work through a network of 'Heritage Communities'; community groups that through their work seek "to demonstrate the organic links between various aspects of human rights and democracy as they relate to human dignity, identity and cultural survival of all communities, particularly the marginalised ones."[27] Communities, not national representatives, put themselves forward to the CoE's Faro team and collaborative relationships with national authorities are not a prerequisite. The Network operates

"on the principle of self-management where heritage communities are able to self-assess, monitor and evaluate their position against the Faro Convention principles and criteria….This approach acknowledges and values the existing wisdom, knowledge and capacities in each heritage community."

The European Heritage Days, which are based on the principles of Faro, sees properties preferably those which are usually either closed or are only partly accessible to the general public, accessed free of charge during a weekend in September. This concept has inspired a number of other volunteer-led initiatives, such as the Italian Monumenti Aperti events, which started in Cagliari in 1997, but now takes place in 70 municipalities and involves around 20,000 volunteers telling visitors about their heritage and culture, interweaving history with their everyday lives and culture.

The EU's cultural routes project is also applying the principles of Faro, not least by connecting heritage across borders. The Atrium project on Architecture of Totalitarian regimes led to the creation of a Faro Network project titled 'Fare Faro a Forli' or Doing Faro in Forli', Forli being one of the Italian towns to partner in the Cultural Route partnership. The project saw the Town Council,

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23   https://www.coe.int/en/web/conventions/full-list/-/conventions/treaty/199/signatures?p_auth=dg2WfyCT
24   *cf.* Arts. 16, 17.
25   *cf.* Section 5, art 18-21: the customary procedures for all conventions.
26   https://www.coe.int/en/web/culture-and-heritage/kosovo
27   http://rm.coe.int/faro-convention-action-plan-handbook-2018-2019/native/168079029c

the town's History of the Resistance Society, local schools and wider community come together to talk about the legacy of Fascism in their lives.

Faro is also been taken on board by a growing number of Erasmus educational projects, such as Decra[28] which brought together the managers of 18 networks related to the EU Cultural Routes projects to discuss how they could achieve the aims of Faro. It has also been felt in sustainable development projects, for example the EU's Septentrion project, concerning the contribution of heritage to sustainable development in fortified towns between the North Sea and the Meuse, who claimed that "Faro's main resolve has been echoed in policies implemented on both national and regional level in France, Belgium and the Netherlands".[29]

Even in those countries where the Faro Framework Convention is not yet in force, its influence has already been felt. In the UK, for example, whose conservation professionals were influential in preparing the text of the Faro Convention, Historic England's 'Principles of Conservation' have also been influenced by the convention and its recognition of the concept of people-focused value-based authenticity, as first expressed in the Nara Document, in which authenticity is defined as the "characteristics that most truthfully reflect and embody the cultural heritage values of a place."[30]

Its influence has been great in France, which has also not yet ratified the convention. Faro projects have concentrated in deprived areas surrounding large towns, such as in Paris and Marseilles. In two of the most deprived ares in the outskirts of Paris, two Faro projects have developed participation, citizenship and social cohesion, promoting relations between generations and neighbourhoods. In Athis Mons, the Maison de Banlieue et de l'Architecture has created a library on local architecture and hosts regular exhibitions and publications that focus on everyday heritage. It organises guided walks on architectural, urban and heritage topics, with groups led by both experts and local inhabitants. In Fresnes, the Val de Bièvre Ecomuseum collects histories, memories and objects related to the heritage of local residents. Exhibitions, some of which are co-produced with the inhabitants, and educational activities for the children are organised by the museum and volunteers dealing with artistic themes or local everyday life.[31] In the context of Marseille's bid for capital of culture in 2011, a co-operative was set up by eight heritage communities in the city's poorer, marginalised northern districts to train local people to run B&Bs and act as interpreters of their local heritage through the idea of heritage walks. The 'Hotel-du-Nord'[32] now operates as a brand, an online platform that showcases local heritage, promotes ethical travel, sells locally produced works and products, and as a space for training and a school for hosts. The cooperative helped run a conference during which the City Mayor symbolically signed the convention.

Of course, Faro is runs through all of the European Union Policy documents – such as the European Framework for Cultural Actions,[33] the EU/ICOMOS quality principles for EU funded projects that impact on Cultural Heritage[34]. Faro is increasingly discussed in professional bodies such as ICOMOS, ICCROM and ICOM and in networks such as EuropaNostra.

28 http://www.decraproject.eu/
29 Frigout, Rochet, Minis, S. The contribution of heritage to sustainable development, In, *Urban heritage and sustainable projects: Septentrion fortified towns between the North Sea and the Meuse*. (2007) Somogy Art publishers, p.169
30 English Heritage "Conservation Principles Policies and Guidance" The Paul Drury Partnership, April 2008
31 Fairclough et al. (2014) The Faro Convention, a new paradigm for socially - and culturally – sustainable heritage action? In, Култура / Culture 8 2014
32 https://www.hoteldunord.coop/en/welcome/
33 https://op.europa.eu/en/publication-detail/-/publication/5a9c3144-80f1-11e9-9f05-01aa75ed71a1/language-en/format-PDF/source-101251729
34 http://openarchive.icomos.org/2083/

2.5   Conclusions

Framework conventions provide a mechanism to increase co-operation and inspire debate between the elected members of its governing bodies. As a "Framework", it is intended that member states flexibly develop much more content around the basic text. It serves to calibrate efforts and as such is equally valuable "for the people of a small village, faced with a damaging development, using internationally recognised terminology for how these matters should be dealt with equitably."[35] Given the increasing power of non-elected institutions in a globalised world, this aspect of intergovernmental co-operation should not be undervalued lest it be sidelined and ultimately lost.

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35 Fojut, N., Council of Europe Framework Convention on the Value of Cultural Heritage for Society, In, *Proceedings of the Vilnius conference* (Publication pending 2008)

C   Training and Professional Development

1   Blended Learning and web-based Learning for Cultural Education Staff

by Martin Christian (Deutsches Institut für Erwachsenenbildung)

1.1   Introduction

The DELPHI Project aims towards the implementation of a blended learning course for the continuous professional development (CPD) of Heritage Interpretation staff and Adult Educators. For the development of the DELPHI approach it is necessary to evaluate existing models of blended learning courses. This is to identify best practice examples and to define whether there needs to be a distinction between specific blended learning formats and different relating topics. Therefore the article is also focussing on examples of courses dealing with Cultural Heritage and the European perspective. For staying clear that there is a common understanding of the blended learning format, an explanation of different approaches will be described hereinafter.

1.2   Blended Learning – A Definition

In the meaning of the term "blended learning" nearly all arrangements of learning can be considered being "blended". This can be different didactic approaches within an event, the mix of input, tasks and homework or courses designed to take place online and face to face.[36] The latter points towards the most common understanding of blended learning.

There are three relevant definitions that refer to the mix of face-to-face units and computer-based learning[37]. The first defines it as systems that "combine face-to-face instruction with computer-mediated instruction."[38] Garrison and Kanuka have a more qualitative understanding of Blended Learning. They define it as "the thoughtful integration of classroom face-to-face learning experiences with online learning experiences".[39] Trapp focusses more on the learning style of the online part and describes blended learning as a combination of traditional classroom teaching[40] and "e.g. self-paced, collaborative, tutor-supported learning"[41]. She has created overviews on how blended learning scenarios can be arranged. Furthermore she depicts the connection of the classical presence training in a classroom and connects it with different types of online learning. A blended learning course can either exist of one of the e-learning events or of a mix of methods. Depending on the didactics it makes sense that learners have the opportunity to use a communication platform for ongoing exchange. If tutorship is needed other elements of online exchange (collaboration, cooperation, communication) can be included.

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36 cf. Hrastinski 2019.
37 For a distinction of the term see below.
38 Graham 2006, p. 5.
39 Garrison 2004, p. 96
40 Heritage Interpretation consciously sets itself apart from classroom teaching. It is reliant on being carried out on site. Nevertheless Continuous Professional Development of Heritage Interpretation Staff can happen in a blended learning scenario.
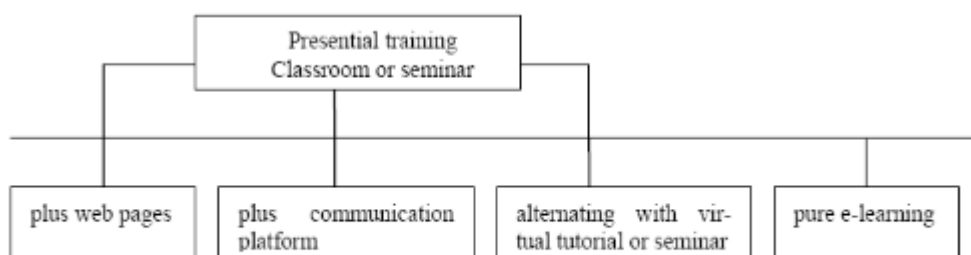41 Trapp 2006, p. 28.

Fig 1 Organisational forms of e-learning (Trapp 2006, p. 29)

Depending on the learning scenario there has to be a focus on the different possibilities of e-learning environments that should be strongly connected to the didactic needs. It is also to regard that online learning is more than just replacing traditional ways of teaching with new technologies. Otherwise the same mistakes made in traditional teaching will be repeated online. This happens for instance when teachers record themselves in front of a classroom and upload a video of them speaking 1 ½ hours or when teachers are replacing the blackboard simply with a presentation.[42] Creating online courses demands a whole different didactic approach. This leads to the question of how to arrange learning content and how to alternate the media in between an online session or learning unit. Therefore some basic types need to be distinguished to understand to potential of online learning: Webinars, web-based learning (content) and tutoring systems.

Webinars are live-events that aren´t stationary, participation is possible from everywhere. Usually, there is a teacher and a group of learners. The teacher has the possibility to interact with the group directly and the group among themselves, which means a little bit of flexibility and thereby learner orientation is available. Also the teacher can integrate different types of media in order to create a unit diversified. Furthermore the implementation of different tools helps to activate the participants. This can be polls, interactive white boards, chat and so on. If a webinar is recorded it overmore loses it´s time-dependency, but interaction is limited then. So the advantages of webinars are remote and partly time-independent participation.

Web-based learning content offers different possibilities than webinars do. Within Learning Management Systems (LMS) the content can be arranged in a motivational order.[43] By learning within a LMS learning happens completely self-directed. The learner decides what content is next and what learning speed suits best. Furthermore the potential of diversified media integration is an asset. Depending on the tool used, the teacher can create or implement videos, graphics, podcasts, presentations, interactive videos, flipcards, interactive boards, a big variety of task types and so on. Dealing with this abundance of media types might also be challenging. On the other hand it is very important to use this alternation in terms of motivation. By comparing online lessons to presence learning or webinars a teacher has the possibility to interact with the learners and react if a learner has difficulties or when the level of concentration declines. In this case a teacher can jump directly to a more activating part of the course, make a break or switch to a method that involves the learners a little more. In online learning environments these possibilities aren´t applicable. Therefore it is important to have an eye on the creation of diversified content.[44] A tool that supports the implementation of content in many different content types is the open source tool

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42 cf. Massy 2006.
43 cf. Klante 2018.
44 cf. Sun 2008.

H5P.[45] Trainers can choose from more than 100 different types depending on their needs. It offers solutions as well for the content format as for tasks and assessments. These different formats help keeping the learners´ attention at a good level.[46]

As already mentioned a direct exchange between learner and teacher isn´t possible in webbased learning. Therefore tutoring systems are becoming more relevant. Tutoring systems are the interface between the learner and the content provider which is usually the teacher. Within these systems answers to tasks can be examined and personal feedback will be provided. The tutoring system can be a set of different technical solutions like a forum, chat or a recommender system. The latter points towards content that could be suitable for a learner at a specific level of knowledge and skills depending on the recent behaviour in a digital learning environment.[47] All these tools try to generate a personal connection to the learner which again supports a good and successful learning experience.

1.3   Blended Learning Courses for Adult Education and Cultural Education

It is important to distinguish two target groups of online learning experiences in the context of cultural heritage. Some museums or sites of cultural heritage are developing parts of an exhibition already considering digital media. Some institutions go even one step further and have developed apps or guides that the visitors can simply download and use on their own mobile devices.[48] The material is designed to gain deep and sustainable information on exhibits or simply to create another way of access to an exhibition. And the material is developed for the use and learning experience by visitors. Visitors are not the subject of the present paper, but shall be mentioned here to clearly illustrate the distinction.

On the other side there is the staff that is planning, curating, promoting, managing or guiding through exhibitions or sites. This group – and in another sense the visitors – can profit from continuous professional development (CPD). Furthermore there is a professional motivation to upskill oneself continuously. It has a lot to commend it that this professionalisation happens ongoing to the job. A blended learning or e-learning approach is an asset in this case. The learners can apply the gained knowledge and skills immediately to their work environment and use the presentation of results for getting feedback from fellow learners or trainers. So the implementation of new approaches happens already during the learning process and can affect further questions and interests which can increase motivation. A presence unit of a blended learning course additionally can strengthen the community between learners which affects the process of learning too.

In the area of Adult Education blended learning concepts are quite common already. Usually courses consist of a line of face-to-face sessions every few weeks and online sessions in between. A classical example is a course for the training of peace and conflict consultants.[49] This course uses typical elements of Blended Learning. The face-to-face units are used for practical instruction and training as well as group feedback. The online units are there for the deepening of theoretical knowledge and reflection of the face-to-face meetings. An online forum extends the online

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45 https://h5p.org/
46 Halbach 2018, p. 255.
47 cf. Biel 2019.
48 cf. Gamper 2013. Visitors of Vienna can use their own mobile devices for getting familiar with the historic city. Furthermore the project Badges (https://projectbadges.eu/) is developed for visitors bringing their own device and gaining knowlegde through answering virtual taks on their mobile phones. In the end users will be rewarded with a digital badge.
49 E.g. https://www.forumzfd-akademie.de/en/part-time-training-course-peace-and-conflict-work

sessions in a way, that participants can exchange and get peer feedback on their homework. This typical model can be transferred to many different purposes. Also for Train-the-Trainer courses this model can be applied, but still there is high potential. Many courses are either fully online or face-to-face courses.[50]

Even though first-hand experience has a different value than the experience conveyed through a computer screen the range of accessibility is way higher. Therefore possible advantages of online learning should be considered while creating content for Heritage Interpretation Staff. Digital learning can shape new possibilities regarding the presentation and availability of learning material. Participants can also profit from the possibility of meeting their group of learners online in between face-to-face units. Lessons can be repeated easily and self-paced learning gives the chance to learn whenever it suits the learner. A feature that is not yet available in the field of Heritage Interpretation is a virtual site for training reasons. Whilst the first-hand experience of a site is essential, in related areas like archeology or planning there are examples of how digital media can support the learning process. Simply applying them to usage in Heritage Interpretation is not yet appropriate. Anyhow it is worth having a look at it and consider whether their integration is worth being considered for staff training reasons.

In one of these examples a site was transferred into virtual reality by a 3D-modelling technique. This online experience then was connected to an e-learning course that was tailored to Cultural Heritage Management. Staff can gain information on architecture and archeology of the site and enhance their knowledge on architectural styles for instance. This happens by choosing an element of the site and receiving connected information on this detail.[51] Furthermore it is possible to connect information on comparable sites or on styles from different periods so that the learner can immediately get in touch with the bigger context and value the site from a different perspective.

In the example given a big advantage lays in the combination of content metadata and learners´ metadata.[52] Next to personal attributes this information contains the learners´ behaviour and learning experience.[53] Depending on the learners´ preferences and pre-knowledge content will be displayed or assessments will be created differently.[54] This means that one course can be designed for a broader variety of learners in relation to their skills and knowledge. The creator of the course can use one set of material and connect bits of information in various levels of skills and knowledge. In a next step assessments on different levels can be applied to measure the growth of competences.

1.4   Blended Learning and the European perspective

The European perspective of blended learning activities and Adult Education is underexposed in the literature.[55] An offer aimed at a target group that is spread all over Europe means long travel distances for at least some of the participants. So from an economic and sustainable point of view it is clear that the learners don´t have to meet face-to-face for every session. Depending on the structure of the course learners can meet in the beginning for getting to know each other and to use the meeting and to generate enthusiasm for the topic.

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50 An example for pure online training is the Open Access OWL Learning Space (https://lernbereich.wb-web.de/). This online course is designed in a way that allows it´s use also in the combination of face-to-face training.

51 cf. Styliadis 2009.

52 Styliadis 2009, p. 38.

53 cf. Biel 2019. Another example is the recommendation system in the OWL Learning Space. A Content Based Filter recommends learning content to a learner depending on preferences that can be derived from learners behaviour.

54 cf. Steber 2019.

55 Khalid 2019, p. 233.

In a blended-learning course that involves participants from different countries many different cultural aspects can be involved and a course can be designed in a way that appreciates this constellation. In a course dealing with cultural heritage or European values parts of a course can consider different points of view, different stories and opposing and common values. The advantage of a blended learning format is, that the learners are connected through a LMS the whole course. If exchange is initiated and fostered, the participants can experience the development of the other learners in the course of time. This can be arranged via webinars, forums or task-specific exchange respectively collaborative tasks. And they can learn from their experiences as well. Small lessons in between the face-to-face parts keep the attention and motivation[56] at a good level and it is easier for participants to be prepared for presence meetings.

1.5 Conclusion

There is lots of experience in the area of blended learning available already. Though appropriate formats for teaching staff in Heritage Interpretation are lacking. There is high potential in conveying knowledge and skills through digital media. Especially when it is about the demonstrative presentation of relevant scenarios – and the comparison to others – there might be a high benefit. Furthermore the place and time independency offers the opportunity to learn at a self-determined pace and wherever the learner is located. Outcome orientation and well designed learning content are necessary to keep the attention at a high level. Therefore blended formats seem to be quite attractive since learning within a group of people – where it is possible to create personal relationships during the learning experience – can cause the needed amount of motivation.

Another challenge is the implementation of such a format in the area of Cultural Heritage. Whilst the direct link and personal experience of a site is very important, online learning formats need to come along with lot´s of advantages. But especially in an European context international groups of learners can profit from such a format. It is easy to access for everyone and many different perspectives and experiences will be involved into the learning process. This is an asset for every participant of a blended learning course.

The DELPHI project will examine possibilities of connecting European Values and Cultural Heritage through blended learning formats. But it is way more than just the combination of different technologies and the creation of digital learning content. It is a contribution to European cohesion and democratic development.

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2 Interpret Europe's Training Policy for Heritage Interpretation

by Valya Stergioti (Mediterranean Centre of Environment; Interpret Europe)

2.1 Background

How did IE's training programme evolve?

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

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

The most obvious model to use when devising IE's training and certification programme was that of the National Association for Interpretation (NAI), in the USA, which, at the time, offered the only fully operational training and certification programme of any interpretation association. It should be noted that several IE members are NAI-certified guides, trainers or planners.

Drivers behind the development of the training programme

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

1. According to its Constitution, IE shall conduct training activities;
2. A significant growth in membership numbers is critical for IE.

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

IE's 2016-2020 strategy infers that economic independence shall be secured through income from membership fees. An exclusive IE training programme with an increasing number of IE-certified

trainers has been seen as the most critical lever to achieve this goal. It has therefore been decided that IE should charge no course or certification fees from trainers or participants and give trainers as much freedom as possible in running IE courses in return for participants taking out IE membership as a mandatory condition to join any course in the IE training programme. Since 2016 more than 980 new individual or professional members joined IE through its training programme.

2.2 IE training attributes

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

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

Based on an enquiry conducted during a meeting of the Management with the designated IE Training Team in February 2016, in Brno, some key attributes to be taken into consideration when preparing and running any IE course were compiled. These qualities were presented, discussed and agreed by a wider circle of IE members in an open workshop held during the IE Spring Event in Prague in May 2017. Among those who participated in the workshop were many longstanding and new IE members, with considerable training and interpretation experience. However, the agreed attributes are by no means a finite subject and discussion is ongoing as IE's training programme develops.

The agreed demands are the following:

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

To foster the IE network for quality interpretation

IE's mission is to serve all who use first-hand experiences to give natural and cultural heritage a deeper meaning. Its two key strategic goals for 2016-2020 are to grow a membership that supports and that is supported by the association, and to anchor heritage interpretation at European and national levels.

IE courses should fulfill the quality criteria mentioned in this paper, not only to give an additional incentive for existing members to continue their membership and to be an active part of IE's

network, but also to attract new members to this network. IE's idea is to enhance the quality of the work done by parks and monuments, museums, zoos and botanical gardens as well as many other institutions related to natural and cultural heritage, by an active exchange including many countries in Europe and beyond. This is the reason why IE course participants need to be individual members. So far, members from more than 55 countries are part of this network.

Furthermore, IE courses should be able to address the needs and mentality of different European countries while at the same time preserving their European identity and promote European heritage as a common bond that unites interpretive professionals from all over this continent. Together with other key stakeholder organisations, IE is working towards this goal. It has therefore been awarded with the European Commission's Altiero Spinelli Prize 2017.

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

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

According to one of the oldest principles of heritage interpretation, "Interpretation is the revelation of a larger truth that lies behind any statement of fact". The same principle applies to IE courses, where participants learn not just how to find and reveal deeper meaning in heritage phenomena but also how to encourage visitors or residents to do so.

Course activities and discussions must be planned and implemented in such a way that trainees understand how to use interpretive techniques to achieve their aim.

To have transparent and clear certification requirements

A pre-determined set of criteria must be met in all IE certification courses for any participant to be certified. These criteria, along with details about the certification process, can be found in the training and certification plans produced for all courses. They are written in a clear way that leaves no room for ambiguities, in order to make the trainers' work easier and the certification process as clear as possible to everyone.

To follow the cooperative approach

To ensure that especially IE certification courses have a long-lasting networking impact, they promote the building of strong relationships between the participants, as well as between the participants and the trainer(s). Different variables from the training and certification plans help group dynamics evolve quickly within the courses creating a strong feeling of belonging. This is achieved through:

- Interactive activities;
- Exercises where participants have to work as pairs or teams;
- Peer evaluation;
- Discussions made in a way that everybody is encouraged to participate;
- Emphasising the trainer's role as a facilitator during the whole process.

Exercises and discussions are based on a capacity building process (where everybody tries to improve themselves) rather than a good/bad, or right/wrong performance.

Finally, even after the course ends, participants can keep in touch with their trainers (as well as the rest of the IE network) through multiple events and/or other courses or modules organised by the association, as well as social media, newsletters, etc.

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

To offer challenges

The activities in an IE training event are designed to build on the pre-existing knowledge and the personal and professional experience the participants have. However, all courses and modules are based on the trainees' active participation, which means that everyone has to get slightly out of their comfort zone and perform. This way, trainees face a challenge, but in an environment that feels safe, thanks to the group dynamics and the trainer's role as a mentor.

Furthermore, IE training events are also challenging since they use original heritage phenomena and sites offering multiple different stimuli that become the source of interpretation in the hands of the participants.

This challenge reaches its climax when participants are asked to strengthen their competences by combining the theory learnt and the knowledge and skills they acquired during the course or module with their actual professional reality.

However, by doing so, trainees are encouraged to find ways to re-think their usual attitudes when presenting heritage to the public and thus find their own solutions on how best to use heritage interpretation in their profession.

To offer variety

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

Equally, participants are also part of the training process, since they bring their own prior knowledge and experience and also act as evaluators when needed. This way, each group and each training event develops its own dynamic, while differences between group members offer another aspect of variety.

To be supportive and inspiring

IE courses and modules support the idea of contemporary heritage interpretation. Therefore, all activities mirror and promote a specific attitude that we expect interpreters to have after completing these events. For example, most training activities are hands-on, promoting personal contact with the site/heritage presented and seek to reveal a deeper meaning the heritage might contain.

Furthermore, all IE courses and modules can, and are supposed to, be organised in or next to a heritage site, and use original phenomena of natural and/or cultural heritage. This way, participants get inspired by the sense of the place and the phenomena they use, while at the same time using interpretive techniques to transfer this inspiration to others.

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

To remain fresh and relevant

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

The Training Team is responsible for updating the courses and modules, by fine-tuning the training plans and by keeping the trainers informed about any changes made.

To be rewarding, meaningful, well-prepared

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

IE certification courses are devised for professionals who wish to improve their interpretive skills, so this is the type of participant we must keep in mind when preparing our training and certification plans for every course. IE modules are open to all members.

The particular type of participant, with prior professional experience in the wider field of heritage management, planning and communication should be considered when preparing the activities of each certification course. They should use participants' prior knowledge and experiences as a basis to build further skills and capacities.

In addition, all certification courses should consist of activities with a clear aim and objectives focused on the certification of the participants. They should not be just a series of fun games and presentations. The training and certification plan is a complete procedure that ensures participants improve within the foreseen duration of the course.

To achieve this, the training and certification plan includes all information a trainer might need in order to run the course. It describes detailed directions about the purpose, participant requirements, daily schedule, activities, material needed, time/exercise, etc. to keep an homogenous, common way of running a course.

To open up professional opportunities

The training programme is part of IE's mission "to serve all who use first-hand experiences to give natural and cultural heritage a deeper meaning", as it offers interpreters the opportunity to improve their professional skills and expand their competences in all different aspects of heritage interpretation.

Therefore, this must be the purpose behind all IE training events, the compass when creating each training plan and one criterion to evaluate the success of the curriculum.

IE supports all its members in their professional development, and its trainers especially, in being good and reliable partners for institutions who are interested in organising IE training events.

2.3   How is IE's training programme organised?

What responsibilities does the IE Training Team have?

The IE Training Team was established:

- To take responsibility for the development and promotion of IE's training programme, with special attention to the quality of courses, modules and trainers;
- To make all necessary efforts so that IE courses and modules always remain fresh, relevant and contemporary;
- To organise a network of IE trainers and to advise them in their cooperation with organising partners;
- To secure for financial and political support for the IE training programme, in agreement with the Directors.

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

How is IE's training programme communicated?

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

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

How are the trainers for particular courses selected?

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

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

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

2.4   Running and developing the programme

The organisational and training process

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

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

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

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

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

2.5   Training courses and modules

The training and certification plan for each certification course or the training plan for each training module specifies the volume and nature of training material to be prepared and used by the trainer.

All IE training material is prepared by those who develop the event, which is then tested in a pilot event, approved by the IE Training Team and confirmed by the Board of Directors.

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

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

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

1. One certification course (40 hours) including all requirements and successful certification;

1. The trainer course (20 plus 8 hours) including all requirements and successful certification;

2. One trainer upgrade (16 hours).

To run a module, a trainer must fulfil steps 1 and 2 above and have attended the module and the particular 8-hour upgrade (instead of 3).
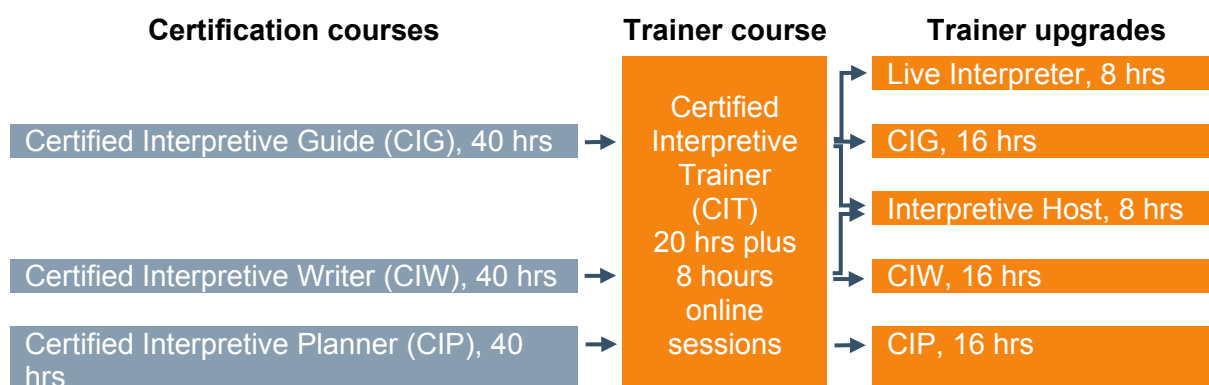
As shown above, to join a Certified Interpretive Trainer (CIT) course participants must have successfully completed one of the three other certification courses (CIG, CIW or CIP) and have previous experience in adult training. Then, after completing the CIT course, CITs need to join the particular trainer upgrade (CIG, CIW or CIP) before they can run their own IE certification courses. CITs can only run the certification courses for which they have themselves been certified.

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

Developing new courses or modules

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

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

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

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

What?

Need for a new course or module	Creation of the new course or module	Running of a pilot course or module	Course or module ready!

Who?

Directors agree with Training Coordinator about the need to develop a new training event	Training Coordinator asks IE members with previous experience in the field to create a pilot event	Creators run the pilot event, Training Coordinator appoints an observer to assess the pilot event	Creators of the event prepare the TCP or TP, Training Coordinator submits it to the Directors for approval

Details

The Training Coordinator includes the project into the action plan which is part of the annual management plan	The pilot TCP or TP is approved by the Training Coordinator and Directors before the pilot event is launched	An observer assesses pilot event using pre-set criteria and drafts an evaluation report for Training Coordinator and Directors	The final TCP or TP is approved by the Training Coordinator and the Directors, the training material is finalised by the creators

Event creators prepare the trainer upgrade and are responsible along with the Training Team for spreading the event within the IE network by multiplying the number of IE trainers for the course or module

All TCPs, TPs and training material remain open to continuous updating, based on trainers' suggestions

2.6   Training trainers

How to become an IE trainer

Every year, IE organises and runs train-the-trainer courses. To attract participants from all over Europe in order to strengthen the IE trainer network and to emphasise the European dimension of IE, these courses are held in English and fees are aligned to the GDP of the trainees' countries of residence. To join an IE trainers' course, participants must be certified in at least one other IE certification course and have previous experience in adult training.

To teach a certification course, a trainer must hold the particular certificate of the course they want to teach. For example, if an IE member wants to run CIG courses, they first need to secure the IE certificate for interpretive guides (CIG), i.e. after completing the 40-hour guide course, passing the written and practical exam, and submitting the specific homework task to the required standard. This ensures that all trainers have experienced the sessions, exercises and requirements as participants in their own right before they use them to train others. It also ensures that trainers can get into an

effective exchange about courses with their IE trainer colleagues. The same is true for modules although they don't include a certificate.

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

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

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

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

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

Conditions to keep the trainer license

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

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

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

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

IE trainer-trainers need to be experienced IE trainers. They are proposed by the Training Coordinator and must be appointed by the Board of Directors.

3 Heritage Interpretation and adult education – similarities and differences

by Angelika Gundermann (Deutsches Institut für Erwachsenbildung)

DELPHI seems to be the first Erasmus+ project that analysed how Heritage Interpretation and adult education can be connected. For the project partners that represent both fields the similarities where obvious enough to apply for this project. As representatives of Heritage Interpretation and adult education came together, we looked at both concepts and hoped to learn from each other. This article gives an impression of this process from the adult education perspective. It examines theories and concepts that relate to the pivotal notions of Heritage Interpretation: firsthand experience, deeper meaning and resonance.

In Germany the community of adult educators encompasses more than 500,000 people, from teachers of German as a Foreign Language to trainers in health care. The group is very heterogeneous; practitioners often lack a pedagogical education and the awareness of being adult educator (Autorengruppe wb-personalmonitor, 2016). The situation is not much different internationally, what is reflected in the initiatives of the UNESCO for adult learning and education (see GRALE,UNESCO Institute for Lifelong Learning, 2019) and the European Commission in the Strategy 2020 with a renewed European Agenda for Adult Learning (European Commission, o. J.). That implies that adult educators play a crucial role and in consequence that professionalisation of adult educators is of great importance. Experts in Heritage Interpretation saw this need as well: InHerit, a predecessor project of DELPHI, developed a competence profile for Heritage Interpretation staff (Tilkin 2016). For the adult education sector competence models were designed recently (GRETA, see Strauch & Lencer 2016; DigCompEdu, see. Redecker & Punie 2017).

3.1 What do adult education and heritage interpretation have in common?

From the point of view of a trainer in adult education the answer may be clear. Heritage interpretation is a special sort of adult education because heritage interpreters do what trainers do: conveying meaning to adults to change their behaviour, attitudes, actions, values, skills and knowledge. That is a very broad but commonly accepted definition of learning. Learning happens in formal, non-formal and informal education, e.g. in a course, but also during a guided tour or by researching information online on your own.

One of the six principles the founder of Heritage Interpretation Freeman Tilden defined says "Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable." Nevertheless for Tilden Interpretation was an educational activity (Tilden, 1957). But the impression remains that researchers on adult education aren't aware of the Heritage Interpretation scene. Or is it only the phenomenon that applies to many practitioners in the field of adult education: the national park guide, the volunteer who shows people around in a castle or the museologist who guides through an exhibition don't see themselves as adult educators.

3.2 Didactic principles of adult education

To bring adult education and heritage interpretation together it is worth to look at the following didactic principles that are currently most popular in German adult education (Schrader, 2018, p. 88-89).

- Participant orientation: not the subject matter of the course is in the centre of didactical planning but its meaning for the participants. Therefore, the process of teaching and learning is transformed: the role of the course instructor changes to be a facilitator. Participants learn self-directed. Because the subjective meaning making patterns of the participants may hinder learning it is the task of the facilitator to break up meaning making patterns.

- Target group orientation: Planners search for information on the possible future participants, to offer courses that find their audience.

- Experience orientation: Adults are part of social networks like family, workplace, political contexts. They have diverse experiences on which learning may built on. According to this adult education courses should use activating methods that include the experiences of the participants. Experiences encompass former acquired knowledge and competences, cognitive, biographical or sensitive experiences, special interests and expectations, experiences of daily life.

- Living environment orientation: Tis is closely connected to the notion of experience orientation. Topic and methods of learning processes should be based on experiences, notions and problems of the living environment of the participants.

Furthermore, adult educators act according to

- Application orientation: the learning process should relate to the further use of the (learning) topics. That doesn't aim to the economic usability but encompasses divers references to the practice of the learner (Brückner et al., 2017)

- Competence orientation: The combination of knowledge and skills/ability in the notion competence seems to be attached to the living environment orientation as it encounters the practical use of knowledge and skills in real situations. Competences are not necessarily connected to vocational training (ibid.).

Most popular in English-speaking fields is the theory of Transformative Learning that hasn't yet much impact in Europe (Laros et a. 2017, p. xiii). Based on Mezirows theory of adult learning "learning is understood as the process of usind a prior interpretation to construe a new or revised interpretation of the meaning of one's experience in order to guide future action" (Mezirow, 1996).

Transformative Learning means transforming perspectives, using critical reflection and in practice uses problem-posing and dialogical methodology in a horizontal teacher-student relationship (Taylor, 2017, p. 18-20).

Lehnes examined the philosophical roots of Heritage Interpretation elaborately and found "the progressive educational tradition as closely allied to the goals and practice of Interpretation" (Lehnes, 2016, p. 5). What differs is the importance of firsthand experience that is indispensable in the process of Heritage Interpretation.

3.3   Firsthand experience - learning activities in non-formal situations

In adult education there are models for learning by (first-hand) experience. For example situative learning (Dewey, Vygotsky), in combination with methods as

- Anchored Instruction,

- Cognitive Apprenticeship,

- Problem Based Learning,

- Collaborative Learning

- Communities of Practice

They are based on practical examination of the learning topic, direct experience apart from artificial learning environments and put the learner in the centre.

Dewey states that "if knowledge comes from the impressions made upon us by natural objects, it is impossible to procure knowledge without the use of objects which impress the mind" (Dewey, 1916/2009, pp. 217–18).

In this concept knowledge can not be conveyed passively but is constructed by the learner during active employment with the learning situation. Previous knowledge and individual learning styles are regarded. Because learning is seen as a social activity collaborative learning in peer groups is used. The "problems" should be authentic and complex. (Scharnhorst 2001, p. 472).

Widely recognized in adult education is the Experiential Learning Theory by David A. Kolb. He developed a four-stage cycle of learning with the elements concrete experience, reflective observation, abstract conceptualisation and active experimentation (Kolb, 2015).

3.4   Deeper meaning - learning and values

Constructivist theory regards adults as self-directed autopoietic systems, who learn what they want to learn, and learn it the way they learned to do it (Siebert 2000, p. 168). That means that adults look for learning subjects that they can identify with and can integrate into their mindset. Subjects they can not integrate may be rejected, they built up learning barriers. New knowledge that can not be biographically synthesised remains without effect. In Germany adult educators discuss these features in the field of political education, where non-formal and informal learning or learning "en passant" is usual. Common ground of the very diverse field is the aim to strengthen social democracy (Hufer, 2016). The theory of cognitive dissonance is regarded as important for political education as well to deal with

the question why people stick to their opinions and attitudes and how to make them change.

One of the "original duties of political education" is to encourage people to stand up against prejudices and concepts like fundamentalism, racism and right-wing extremism (ibid., p. 79). Some learning methods or forms of learning settings for political education show vicinity to the principles of Heritage Interpretation. Hufer lists e.g.:

- biographic learning: connection to the individual life of the learner

- learning on site, e.g. visit of memorial sites (ibid., p. 92-98)

Empowerment and participation are keywords in adult education. For example, Community development and education as a practice that aims at the integration of marginalised groups is a transnational movement in education (Zeuner, 2020). In the context of global frameworks as the UN Sustainable Development Goals some see the potential of adult education in "its pivotal role in addressing social transformation an promoting global-local partnerships, and its relationship to the issue of sustainability" (Schreiber-Barsch & Mauch, 2019, p. 515).

3.5   Resonance - learning and emotions

Emotions and their importance for learning have been discussed more intensely since about the beginning of the millennial (see Arnold & Holzapfel, 2008). Constructivist learning theory states a strong role of emotions in connection with knowledge; emotions are connected with cognitions and body reactions and there are emotional components in knowledge (Siebert, 1998, p. 24). Schüssler (2007) examined the neurophysiological, depth psychological and phenomenological aspects in a learning theory for emotion based sustainable learning.

3.6   Media

Media on Heritage sites are mainly panels, but Heritage Interpretation uses also reconstructions and re-enactments. The use of digital devices and tools is contested by those who consider the firsthand experience as condition precedent for the learning activity following Freeman Tildens six principles. On the other hand, there are experts that develop digital applications for heritage sites (e.g. Rahaman, 2018). Of course, there is a difference between the encounter with an original piece of art or architecture and merely looking at it on a screen. As adult educators we raise the question if this is decisive for the learning process. If and in what way on site learning differs from e-learning is one of the most discussed question in education at the moment.

3.7   Learning from Heritage Interpretation

Learning for adults generally is not regarded as related to "concepts and ideas which are meaningful for human beings". Adult learners in language courses, continuing professional development or expositions don't expect to get in contact with "deeper meaning". In the DELPHI project we defined European values as stated in Article 2 of the Lisbon treaty (European Union, 2012) to be this deeper meaning. These are respect, dignity, freedom, democracy, equality, the rule of law, human rights, pluralism, nondiscrimination, tolerance, justice, solidarity. Reading this it becomes obvious that these deeper meanings should not only be revealed by adult educators in any learning situation, but that they should be inherent to adult education.

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