

CIAT-Accredited Conservationist Register Candidate Guidance Notes





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01. Introduction

The CIAT Conservation Accreditation Register identifies Chartered Architectural Technologists competent in the conservation of historical buildings/assets and their surroundings. CIAT's Conservation Accreditation Scheme is recognised in the UK by the four home countries' Heritage Bodies: Historic England, Historic Scotland, Department for Communities Northern Ireland and Cadw (Welsh Government historic environment service) for its members to act as lead consultants on grant/fund aided projects.

Chartered Architectural Technologists applying to join the CIAT Conservation Register must demonstrate competence against the fourteen skills identified by the International Council on Monuments and Sites (ICOMOS) and defined within the *ICOMOS **Education and Training Guidelines***.

This document is designed to guide candidates through the qualification process. In compiling their portfolio of evidence, candidates are advised to refer to COTAC's Understanding Conservation website (*please refer to Appendix 1*).

Assessment of suitability to be placed upon the CIAT Conservation Register will be determined based upon an assessment of a candidate's portfolio followed by a formal interview. CIAT will inform candidates of the outcome of their portfolio assessment and the interview will be arranged for a mutually convenient time thereafter.

From 1 January 2021, CIAT-Accredited Conservationists are eligible to undertake work as a Quinquennial Inspector. Church buildings must be inspected every five years and the inspection must be carried out by a suitably experienced and qualified professional. Please refer to the Church of England's website for further information.

CIAT has two routes available:

1 CIAT-Accredited Conservationist

In order to attain Accreditation, candidates must be practising in a conservation related field and must be able to demonstrate their competence against the five units through conservation projects carried out in practice outlined in Section 5 of this document. Candidates can provide five projects or choose to use several elements of projects and projects must be no more than five years old. In order to remain on the Register, candidates must retain currency in the field of conservation, and this must be demonstrated to the Institute every five years. This route is recognised by grant/fund providing bodies as identified in the introduction.

2 CIAT-Recognised Conservationist (non-practising)

CIAT recognises that some of its members, although having sufficient knowledge in the area of conservation, may not be practising in this area and will therefore be unable to demonstrate the competences required through the conventional assessment route. Instead, CIAT will accept up to five simulated case studies (hypothetical examples) prior to awarding the designation of CIAT-Recognised Conservationist (non-practising). Any candidate choosing this route will have to meet the same competences as the above route but will not be recognised by grant-fund providing bodies.

Skills Matrix

CIAT-Accredited Conservationists have the following skills.

Overview	Knowledge	Personal Work	Technical skills	Management	Philosophy
<p>Authority in architectural conservation and its wider context</p> <p>Qualified to lead on projects of all sizes and complexity, including heritage assets requiring significant repair and of special importance</p> <p>Recognised for excellence</p> <p>Creates strategic solutions to complex challenges</p>	<p>Deep knowledge of architectural conservation</p> <p>Applies broad range of regulatory frameworks and policy</p>	<p>Consistently high standards and close attention to detail</p> <p>Strong commitment to architectural conservation</p> <p>High level of autonomy</p>	<p>Authoritative analysis and interpretations</p> <p>Effective conservation interventions</p> <p>Expert advisor in wider conservation teams</p>	<p>Understands overall perspective and takes a holistic approach as well as detail-oriented</p> <p>Manages resources efficiently in a sustainable/ climate change context</p> <p>Understands procurement processes including finances, planning and contracts as appropriate to the architectural conservation project</p> <p>Leads and manages teams and projects</p> <p>Effective communicator and negotiator</p> <p>Ability to engage with wider stakeholder groups</p>	<p>Considers broader conservation debates</p> <p>Engages with conservation ethics and learning</p> <p>Articulates conservation philosophy</p> <p>Considers and integrates social, technological, economic, environmental, political, ethical, cultural and aesthetic factors</p>



02. Routes to Accreditation and designations

It is important for applicants to understand the conservation-led approach that underpins good practice. This involves investigation and understanding of the significance of the building or asset and the ability to use that information with their relevant technical skills to inform their work. To attain Accreditation, they must be able to demonstrate this fully as set out below.

In order to be placed upon the CIAT Conservation Register as either a CIAT-Accredited Conservationist or CIAT-Recognised Conservationist (non-practising), the following criteria must be met:

1. Candidates must be a Chartered Architectural Technologist.
2. Candidates seeking to become CIAT-Accredited Conservationists must have sufficient appropriate experience of conservation intervention work to be able to compile an evidence-based portfolio of 'real-life' case studies.

Candidates seeking to become CIAT-Recognised Conservationists (non-practising) must have sufficient knowledge of conservation intervention work to be able to submit a portfolio of simulated case studies or academic work.

3. Candidates must successfully complete the CIAT Conservation Register application process, which includes submission of a portfolio and an interview.

03. Eligibility criteria

In order to remain upon the CIAT Conservation Register, all candidates must:

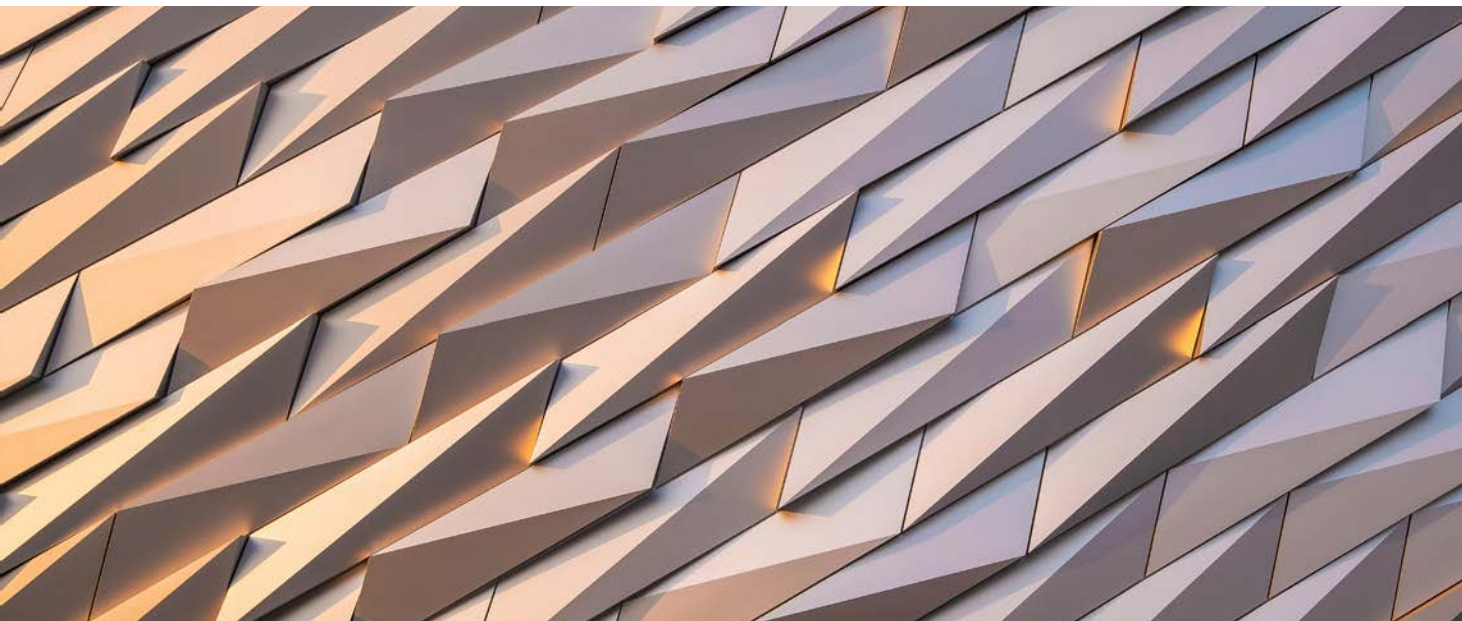
1. Maintain Chartered or Fellow Membership of CIAT and adhere to its **Code of Conduct**.
2. Undertake adequate and relevant conservation related CPD as determined by the candidate, as part of CIAT's CPD requirement under Clause A7 of the Institute's Code of Conduct, which will be monitored in line with current Institute policy.
3. Pay an annual subscription fee. The fee list can be found here **Membership and Subscription fee**.
4. Be subject to re-assessment every five years (for those who have CIAT-Accredited Conservationist status only).

04. Summary of Experience

The Summary of Experience is a 500–750-word overview of the candidate's experience and conservation background (how and why they got into their particular area.) Candidates should focus on their current job or recent roles and include leadership and management experience where possible.

This will give the assessors background context and allows the candidate to demonstrate their ability, skills, experience, and competences.

This section should have an attached Appendix which includes an up-to-date CV and any relevant academic or professional qualifications, as well as a record of conservation related CPD for the preceding five years. This may include (but is not limited to): descriptions or syllabuses of short courses taken, CPD records, publications and other relevant references the assessors might find demonstrates experience or skill. CPD records for the past five years may include time devoted to education and/or project work, courses, conferences, masterclasses etc. attended and books, charters, standards, reports, articles read, etc.





05. Writing case studies

Candidates are required to write a maximum of five cases studies which will be developed from no more than five projects/elements of projects completed in the last five years.

Case studies should focus on what the candidate did to contribute to the project, rather than details of the project itself, i.e., their influence and role in the project and decisions they made to demonstrate how they meet all requirements below. Candidates' written accounts should demonstrate their professional judgement in the form of analyses, professional opinion, advice, proposals and conclusions.

Candidates do not need to use every case study to demonstrate that they meet every requirement, but all case studies should be used broadly to meet every requirement.

How to begin the case study

Each case study should begin with a brief list (of no more than 150 words total) detailing the:

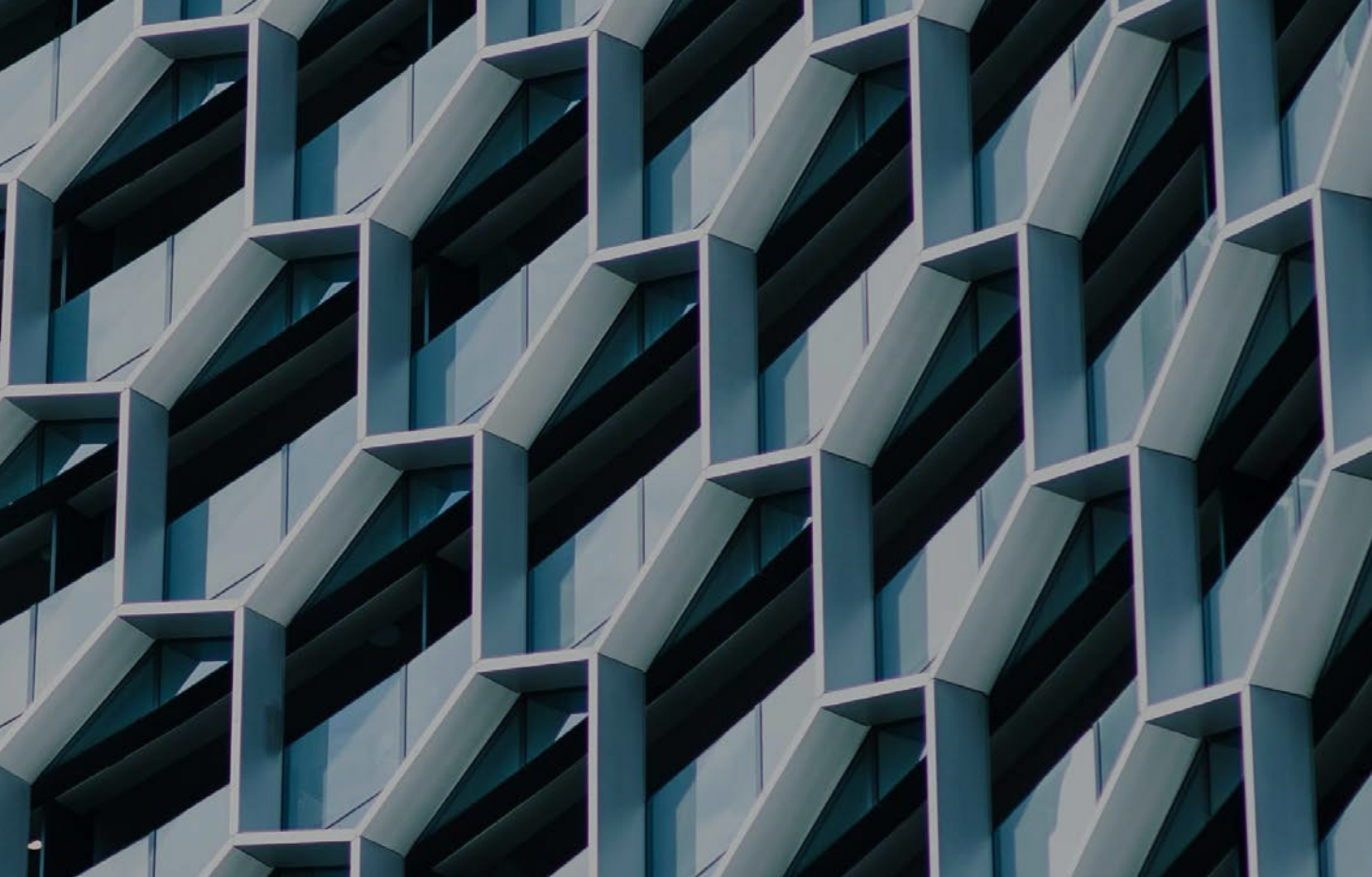
- Project title
- Location
- Nature of the project
- Listing status
- Relevant dates and budget
- Candidates' official role/title; and
- A word count of the case study.

This must be followed by the case study which is a written statement of between 500 and 750 words (excluding the 150 words above), summarising what the candidate did in the project, taking into consideration the requirements set out in the units below.

Across all the case studies, candidates are required to explain their understanding of the historic nature and significance of the buildings they are discussing. Candidates must demonstrate their ability to identify and assess problems, as well as the conservation philosophy followed, the difficulties encountered, solutions considered, and the repair or adaptation works undertaken.

To ensure that assessors have sufficient detail and evidence to understand whether the candidate has met the requirements of the Scheme, candidates should avoid writing general sentences such as, *"I have a lot of experience and knowledge in the area of conservation."*

When making claims in the case studies, it is always better to focus on one or two examples that demonstrate the candidate's approach rather than making self-promotional or generalised claims. Therefore, repeated claims such as, *"I am a highly expert and experienced conservation professional"* or *"I work well with a wide variety of built environment professionals to achieve conservation project aims"* do not belong in these types of case studies. Instead, the candidate should demonstrate specific, personal examples mapped against the requirements of the Scheme.



An example of how the candidate might write a case study is below. Please note that this is only an excerpt and submissions would be longer than what is included below. Candidates must not base their submission on a re-phrased version of this example as such applications will be rejected.

Case Study 1 illustrative example
(excerpt from a total 750-word case study):

“In Project D, I soon realised that there was going to be an issue with tourists and their impact on certain areas of our on-going restorations (ICOMOS K, see the site plan with the issue areas highlighted in Appendix 1, p.1). Consequently, I liaised with Supervisor X and colleague Y (ICOMOS M, see our email exchange in Appendix 1, p.2-4). We discussed the possibility of setting up a video of the restoration in the main Reception centre with Administrator Z (ICOMOS N, see a link to the video and photo of tourists watching the video in the Reception centre in Appendix 1, p.5) and then agreed to further block off the old pathway in order to protect the actual site while still engaging visitors (ICOMOS E, see the revised Area Map that was handed out to visitors in Appendix 1, p.6).

After implementation, we found that this seemed to make tourists even more interested; a few even tried to sneak in beyond the barriers and many were asking detailed questions that the tour guides could not answer. Our interim solution was to have tours arranged during set times in the day when people could watch the restoration from a viewing platform and then ask questions of the

conservation team (ICOMOS L, see the tour schedule and promotional blurb about how we discussed restricting access in Appendix 1, p.7). It made their experience both more interactive and protected the site (see visitor feedback quotes in Appendix 1, p.8). This proved to be an excellent solution and one I will look forward to implementing on further projects.”

Exploring complex problems in the case studies

The projects chosen as case studies for evidence should be examples of complex problems rather than promotional examples where the candidate did everything right.

Complex problems are typically those which present:

- a dilemma or an instance that required significant value judgement.
- a situation that presents substantial technical problems the candidates needed to solve.
- a problem where a deep level of not only practical understanding but the ability to expertly apply it was required; or
- an instance that necessitated the marshalling and management of a wide range of resources.



06. Evidence requirements

Candidates are required to collect and submit evidence to back up their statements, mainly expected to be drawn from up to five projects/elements of projects from the past five years.

There needs to be a balance maintained in terms of what is reasonable and accessible evidence. For example, a candidate submitting a book they had written in its entirety would not be appropriate as evidence. However, if they excerpted a chapter of the book that was clearly mapped to the assessment criteria and related to recent and relevant work, then this could be acceptable if it was obviously relevant, referenced, timely and appropriately mapped to the criteria.

All evidence submitted should be within the conservation context, derived from dealing with physical decay of buildings, their everyday maintenance and adapting redundant buildings for alternative, sustainable usage. The principles of conservation must be adhered to. Those principles include minimal intervention, reversibility, minimal loss of fabric and preservation of authenticity and integrity.

Evidence should also be derived from, and relate to, the candidate's work rather than a team's. However, managing a team to deliver a certain aspect will be accepted as valid evidence.

A maximum of five appendices/folders of evidence (one for each case study) and one Summary of Experience appendix/folder of evidence should be submitted; a maximum total of six appendices/folders of evidence.

Each of the folders should contain no less than five pieces and no more than 12 pieces of evidence. Preferably, all the evidence would be transferred into one document for each case study – with clear labels on each page and everything/excerpts readable at A4 size – saved as a .pdf for each case study and then labelled and referred to as either Appendix A, Appendix B etc.

The evidence to support the case studies may include (but is not limited to) design plans and details (drawings, specifications, calculations, hand drawn sketches/site sketches), non-generic specification clauses, captioned photographs, emails, evidence of discussion with the client, project proposals that show resourcing or management of the project particularly when they relate to how the candidate ensured quality or resolved issues. The candidate must clearly explain why they are submitting each piece of evidence in a Table of Contents.



For example:

Table of Contents (Case Study 1)

1. Design plan 1, page 1

This design plan gives an overview of the building project and clearly shows what an advanced example it is in terms of conservation interventions and restoration.

2. Photographs 1 and 2, pages 3-4

These are a set of “Before” and “After” close-up photographs of the conservation work I did on the exterior brickwork of this building. I had to both source additional XX type of brickwork for this, but we could not find enough readymade stock of this particular colour and size. In order to finish the project, I also had to commission the remaining 1000 bricks required from Contractor 2 (see next Appendix item which includes some emails we had on the topic regarding deciding whether or not to use machine or handmade bricks and how to ensure the bricks were a match for the rest of the building).

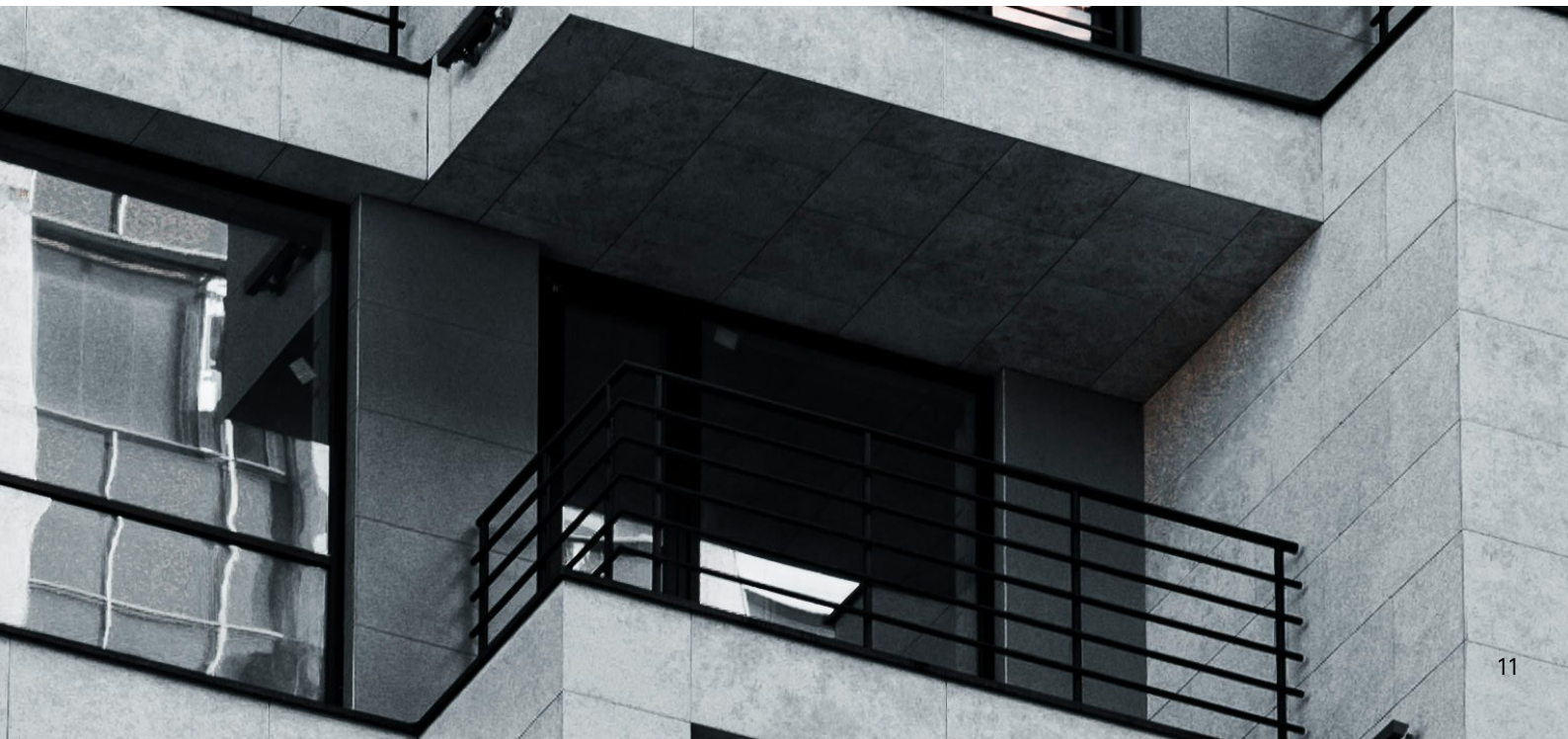
When writing the case studies, the unit requirements should be referenced in brackets so that it is clear to the assessors that the requirements are being met. For example: “It was my suggestion that we consider potential changes in upcoming environmental requirements, which saved the project approximately £25,000 by anticipating a legislative change one year in advance (Competence XX, XX and XX).”

Submitting a Competence Mapping List

To ensure that all competence requirements have been met, candidates must submit a “Competence Mapping List” that shows the sections in which each of the requirements in the units are referenced in the following format. Please provide as much information as possible regarding the location of the mapping.

Competence Mapping List

Unit 1: Conservation Foundation	1.1	1.2
Case Study 1	Page 2, para 4	
Case Study 2		Photograph 1
Case Study 3		Page 6, para 6
Case Study 4		
Case Study 5		





07. Units

Unit 1 **Conservation Knowledge**

- 1.1 understand and interpret heritage assets (such as a monument, ensemble or site).
- 1.2 understand the setting of a heritage asset (such as a monument, ensemble or site) and its cultural, physical and intellectual context.

Unit 2 **Conservation Analysis**

- 2.1 understand the setting of a heritage asset (such as a monument, ensemble or site), their contents and surroundings, in relation to other buildings, gardens or landscapes.
- 2.2 find and absorb all available sources of information relevant to the heritage asset (such as a monument, ensemble or site) being studied.

Unit 3 **Conservation Techniques**

- 3.1 understand and analyse the behaviour of heritage assets (such as monuments, ensembles and sites) as complex systems.
- 3.2 diagnose intrinsic and extrinsic causes of decay as a basis for appropriate action.

Unit 4 **Conservation Methods**

- 4.1 inspect and make reports intelligible to non-specialist readers of heritage assets (such as monuments, ensembles or sites), illustrated by graphic means such as sketches and photographs.
- 4.2 know, understand and apply UNESCO conventions and recommendations, and ICOMOS and other recognised Charters, regulations and guidelines.

4.3 make balanced judgements based on shared ethical principles and accept responsibility for the long-term welfare of cultural heritage.

4.4 recognise when advice must be sought and define the areas where different specialists are required, e.g., wall paintings, sculpture and objects of artistic and historical value, and/or studies of materials and systems.

Unit 5 **Conservation Expertise**

5.1 give expert advice on maintenance strategies, management policies and the policy framework for environmental protection and preservation of heritage assets (monuments and their contents, and sites).

5.2 document works executed and make them accessible.

5.3 work in multi-disciplinary groups using sound methods.

5.4 be able to work with inhabitants, administrators and planners to resolve conflicts and to develop conservation strategies appropriate to local needs, abilities and resources.

Submission Dates

Applications will be accepted for the CIAT Conservation Register three times a year, in April, August and December. Please check *AT Weekly* and the website for confirmation and details of the next submission date. Dates will usually be announced three months prior to the next submission round. Alternatively, you can email conservation@ciat.global for information.

08. Submitting the completed portfolio

A panel of two Conservation-Accredited Chartered Architectural Technologists normally conduct both the portfolio assessment and formal interview. An Accredited Conservation professional from another discipline may also take part. New assessors in training or other relevant observers may be present but should not be involved in any decision-making and have no authority or responsibility.

Failure to submit all required paperwork and fees will delay the application. Once the application has been accepted, the candidate will be added onto the Institute's waiting list. It is suggested that the candidate retains a copy of the submitted portfolio to refresh themselves prior to the formal interview.

09. Assessment

The candidate will be advised of the outcome in writing within eight weeks of the portfolio assessment. If the candidate has been successful, they will be advised of their formal interview arrangements, which may include supplying additional evidence or other information to the formal interview. If the candidate has been referred, they will be advised as to the reasons for the decision and any remedial action to be taken, including a recommended time for resubmission if appropriate.

Formal interview assessment

This Scheme operates a virtual interview process unless candidates request a face-to-face interview as a reasonable adjustment. The interview will be based around two components:

1. the previously submitted portfolio; and
2. a brief verbal presentation on the candidate's approach to conservation, followed by a discussion on their involvement in conservation projects.

The candidate's own approach to conservation should be presented in the first five minutes of the interview. Notes can be used but should not be read out in full. This will be followed by a professional discussion with the Assessors.

The formal interview is designed to draw out the professional aspect of the candidate's conservation experience, which should adhere to the *Code of Conduct* (available at www.architecturaltechnology.com). It should not be necessary for the candidate to bring any additional material, unless it has been requested following the portfolio assessment. The candidate should however ensure that they are familiar with the contents of their portfolio. The candidate will be required to produce photographic identification at the start of the interview, such as a passport or driving license or email a copy of their identification to CIAT staff prior to an online interview.

The interview should last around 45 minutes, at which point the Panel will deliberate in private. The Panel's decision may or may not be given on the day, but in all cases the candidate will be notified in writing within four weeks of the interview. If successful and once the annual fee has been received, the candidate will be welcomed onto the Register and issued with a certificate. If the candidate has been referred, they will be advised as to the reasons for the decision and any remedial action they might take, including a recommended time for resubmission if appropriate. The Institute is dedicated to support any member and affiliate through their qualifying progression and accommodate any specific requirements or assistance. Please contact the Institute on +44(0)20 7278 2206 or conservation@ciat.global



10. Re-accreditation or Re-joining

After five years of Accreditation or in the instance of lapsed Chartered Membership, each Member will be re-assessed to confirm their ongoing competence and will be required to submit proof of continued and relevant work in the field of conservation in order to remain on the Register. Accredited members will be re-assessed by submitting one case study of between 500 and 750 words, using projects undertaken in the previous five years for which they have been responsible. Evidence of conservation specific CPD undertaken in the preceding five years is also required.

11. Appeals

Any candidate refused admission to the Register wishing to appeal the decision to may do so through the Institute's independent appeals procedure, details of which will be included with notification of such a decision.

Appendix 1

Recommended reference points and reading list

International Council on Monuments and Sites (ICOMOS) Education and Training Guidelines:

Applicants are strongly recommended to refer to www.icomos.org which will provide further guidance on the ICOMOS guidelines which confer standards and guidelines for education and training in the cultural heritage conservation of monuments, groups of buildings and sites, and ensures that those undertaking this function are competent professionals.

Conservation professionals should be able to:

- a. read a monument, ensemble or site and identify its emotional, cultural and use significance.
- b. understand the history and technology of monuments, ensembles or sites in order to define their identity, plan for their conservation, and interpret the results of this research.
- c. understand the setting of a monument, ensemble or site, their contents and surroundings, in relation to other buildings, gardens or landscapes.
- d. find and absorb all available sources of information relevant to the monument, ensemble or site being studied.
- e. understand and analyse the behaviour of monuments, ensembles and sites as complex systems.
- f. diagnose intrinsic and extrinsic causes of decay as a basis for appropriate action.
- g. inspect and make reports intelligible to non-specialist readers of monuments, ensembles or sites, illustrated by graphic means such as sketches and photographs.
- h. know, understand and apply UNESCO conventions and recommendations, and ICOMOS and other recognised Charters, regulations and guidelines.
- i. make balanced judgements based on shared ethical principles and accept responsibility for the long-term welfare of cultural heritage.
- j. recognise when advice must be sought and define the areas of need of study by different specialists, e.g., wall paintings, sculpture and objects of artistic and historical value, and/or studies of materials and systems.

- k. give expert advice on maintenance strategies, management policies and the policy framework for environmental protection and preservation of monuments and their contents, and sites.
- l. document works executed and make same accessible.
- m. work in multi-disciplinary groups using sound methods; and
- n. be able to work with inhabitants, administrators and planners to resolve conflicts and to develop conservation strategies appropriate to local needs, abilities and resources.
- i. produce coherent and relevant methodologies and specifications for the conservation of monuments, ensembles and sites.
- j. record all findings from investigations and works executed in a manner accessible to specialist and non-specialist users.
- k. provide expert advice on future maintenance and management for the long-term safeguarding and conservation of monuments, sites and ensembles.
- l. work with clients, stakeholders, local communities, administrators and policy makers to build consensus and to develop conservation and management strategies appropriate to local needs, abilities and resources.

Comité international de la Formation (CIF) is the International Training Committee of ICOMOS.

The professional attributes that all conservation practitioners should have are as follows:

- a. understand and interpret a monument, ensemble or site.
- b. understand the setting of a monument, ensemble or site, and its cultural, physical and intellectual context.
- c. investigate and understand available sources of information relevant to the heritage concerned, including the technologies (traditional and regional) used to produce them, and the social, political and historic forces that shaped them.
- d. interpret the results of this investigation in order to identify cultural significance and values associated with tangible and intangible elements of the heritage.
- e. be a part of a team working on a monument, ensemble or site, all of whose members respect its significance and values.
- f. understand and analyse the performance and transformations of monuments, ensembles and sites as complex systems in order to diagnose intrinsic and extrinsic causes of decay, and plan for and undertake their conservation.
- g. make balanced, responsible judgements based on ICOMOS charters and guidelines, current good practice and national and international standards for the long-term benefit of the cultural heritage.
- h. recognise when specialist knowledge is required, define specialist areas of study and work in multi-disciplinary groups.

- m. recognise the need to position conservation decisions within national regulatory and planning policy frameworks, including environmental protection and climate change.

www.understandingconservation.org is an educational resource and applicants that are applying for Accreditation are strongly recommended to refer to the site, which will provide further guidance on the contents of the portfolio

COTAC Insight 1 - Introduction to the Need to Appreciate the Built Heritage (architecturaltechnology.com)

COTAC Insight 2 - Introduction to the Need to be Aware of the Built Heritage

Understanding Conservation

For information on education and training of all those involved and interested in the protection and preservation of the historic environment, please visit the Council on Training in Architectural Conservation (COTAC) website: <https://www.cotac.global/>

To find out more about the approach to the conservation and care of old buildings taken by the Society for the Protection of Ancient Buildings (SPAB) please visit: www.spab.org.uk

For a list of Heritage Definitions, please refer to the Historic England website: <https://historicengland.org.uk/advice/hpg/hpr-definitions/>

BS 7913: 2013 Guide to the conservation of historic buildings **BS 7913:2013 | 31 Dec 2013 | BSI Knowledge (bsigroup.com)** - (please note, a fee is payable to BSI for this document).



**Chartered Institute of
Architectural Technologists**
397 City Road
London EC1V 1NH

+44(0)20 7278 2206
education@ciat.global
architecturaltechnology.com

in /Chartered Institute of Architectural Technologists
@ /CIATechnologist
f /CIATechnologist
▶ /CIATechnologist
🐦 @CIATechnologist

