

# Conservation Register Candidate Guidance Notes





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Effective 1 August 2021





# 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 Register to become Accredited as a Conservationist 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 registration process, as it contains the requirements of the framework alongside typical evidence.

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 a technical assessment of a candidate's portfolio followed by a formal interview, again based upon the submitted portfolio. 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.







## 02. Routes to Accreditation and designations

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 five case studies (hypothetical examples) prior to awarding the designation of CIAT—Recognised Conservationist (non-practising).

Although any candidate choosing this route will have to meet the same competences as the above route. Candidates undertaking this route will not be recognised by grant-fund providing bodies.



## 03. Eligibility criteria

It is important for scheme 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, and 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 candidate must meet the following criteria:

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. 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 case studies or academic work.
3. Candidates must successfully complete the CIAT Conservation Register application process, including technical assessment and formal interview.

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

1. Maintain Chartered Membership of CIAT and adhere to its *Code of Conduct*
2. Undertake adequate and relevant CPD commensurate with ongoing duties and responsibilities (as determined by the candidate), which will be monitored in line with current Institute policy.
3. Pay an annual fee to cover administration and promotion of the Register.
4. Be subject to periodical re-assessment.





## 04. Submission guidelines

All submissions must include:

- Completed application form.
- Curriculum vitae covering candidate's involvement in conservation.
- Concise summary and report of relevant projects.
- Appendices of evidence related to each project.

Candidates must provide a concise description of their personal involvement in either five completed projects, or elements of projects. These projects should be no more than five years old. Candidates should explain how each competence was addressed, referencing where specific competences have been met against each piece of evidence, i.e. in a specific paragraph/page/section.

***Candidates are not required to submit a different piece of evidence for every competence; one piece of evidence can cover multiple competences as long as this is clearly referenced in the evidence matrix.***

***The purpose and added value of supporting evidence should be carefully considered to ensure it is relevant to the application. All evidence must be focused and succinct. Should the assessor consider the application to be overly lengthy or lacking focus, they may request that the candidate reviews it to make it more concise, which may delay the application process.***



# 05. Evidence requirements

**Candidates must demonstrate competence in accordance with the ICOMOS guidelines (see Appendix 1) showing how they have considered and incorporated them in their decision-making.**

Evidence must be drawn from real conservation projects for candidates seeking to become CIAT-Accredited Conservationists, but for those seeking to become a CIAT-Recognised Conservationist (non-practising), the evidence must be in the form of five case studies.

For candidates seeking to become CIAT—Accredited Conservationists, evidence must be derived from the candidate rather than the team. Candidates should be able to demonstrate that they recognise that they may not have sufficient expertise in all aspects of work associated with conservation intervention.

As a project leader the ability to manage a team will also need to be demonstrated, and evidence of this should form an element of the candidate's submission. If the candidate is referencing someone else's work, only a specific synopsis or extract is to be submitted.

All evidence submitted should be conservation project-based, derived from dealing practically with physical decay of buildings, their everyday maintenance and adapting buildings for alternative, sustainable uses. Projects provided do not have to be from listed buildings only. Other conservation work can be included such as maintenance work in a conservation area, but the principles of conservation must be adhered to. Those principles include minimal intervention, reversibility, minimal loss of fabric, transparency of intervention and preservation of authenticity and integrity.

Typical evidence which could be submitted for each unit is outlined below. This range of evidence is to provide useful guidance for candidates, but it is not an exhaustive list. CIAT strongly urges all candidates to visit [www.understandingconservation.org](http://www.understandingconservation.org) for further guidance on the contents of the portfolio, which provides a self-assessment tool to test mindset, skills and competence prior to submitting a portfolio of evidence.

For lengthy documents such as reports and research, relevant extracts should be presented, clearly referencing which competence is being addressed. Other information might include; educational qualifications, employment details and experience, professional qualifications, short courses, CPD records, publications and references.

All supporting evidence should be provided as appendices and should be directly referenced on the evidence matrix in the application form.





# 06. Conservation Register Scheme outline

**There are five units of skills identified within the scheme:**

- 1. Approach to Conservation**
- 2. Site Analysis and Intervention**
- 3. Investigation, Materials and Technology**
- 4. Social and Financial Issues**
- 5. Implementation and Management of Conservation Works**

Within the context of each unit, a site could be defined as a building, group of buildings, whole geographical area (urban/ suburban/rural), a single monument or particular element(s) of a building.

## **Unit One Approach to Conservation**

A vital skill for a conservation practitioner is the ability to evaluate and recognise cultural significance. All conservation work involves a synthesis of skills; probably the most important of which is the ability to read a building or asset, evaluate its significance and establish its value not only to its current owner but also to its local, national and international audiences. Heritage assets might be a building, a group of buildings, whole geographical areas, a single monument or a building element. Refer to Appendix 1 for relevant Historic England documents.

This unit is designed to assess a practitioner's expertise with respect to investigating and assessing the cultural, historical, social, spiritual and emotional significance of a site, the importance of its architectural quality, spatial layout, use and significance of the physical fabric in order to make informed decisions about its treatment and protection.

1.1

Identify and research sources relating to the historical, cultural, social and emotional development of sites.

1.2

Assess and analyse these sources.

1.3

Explain your own approach to the conservation, restoration, repair or re-use of a site.

Forms of evidence may include:

- documentary research and its analysis;
- survey reports, measured drawings or photogrammetric surveys;
- design work, including specification of works;
- funding applications; and
- applications for statutory and other consents.

## **Unit Two Site Analysis and Intervention**

Assets, buildings and sites are valued because of their significance to a range of interest groups and for a variety of reasons. They will have established value





through use which has developed over time and will have established significance historically, for past, present and future generations. An asset may be recognised as an example of building type, famous designer's work, historical style or social change; as such its value needs to be identified and protected. Any intervention, however small, is likely to affect appearance and consequently architectural value.

This unit is designed to assess a practitioner's expertise and ability in recognising and assessing architectural quality and social value in order that conservation intervention, whether it be a whole site or building element(s) is undertaken with full knowledge and appreciation of its potential impact upon existing architectural quality and social value.

Candidates are required to demonstrate that they are able to:

#### 2.1

Survey, analyse and assess existing qualities of site or building element.

#### 2.2

Identify if intervention is required and what, if any, work must be undertaken and the implication of any proposed works.

#### 2.3

Identify vulnerable aspects of a site.

#### 2.4

Develop Critical Analysis for possible solutions to technical or functional problems to develop a holistic approach.

Forms of evidence may include:

- building and/or area analysis through character statements;
- drawn and specified proposals;
- development of alternative proposals and analysis of options;
- funding applications;
- applications for statutory and other consents; and
- reports on relevant issues.

Projects can also include new build elements and how they relate to the existing historic structures/ site.

#### **Unit Three Investigation, Materials and Technology**

Assets, buildings and sites are valued because of their significance and value to their current owner or user as well as local or national culture as a whole in the past, present and future. Therefore successful conservation requires incorporation of additional technical factors to ensure that special values are identified and protected. This could include balancing the need for current regulation conformity with its implications for the site and identifying, rectifying and minimising environmental and other deterioration.

This unit is designed to assess a practitioner's expertise with respect to condition surveys and investigation of defects, their symptoms and causes. It will also assess their ability to make balanced, defensible decisions in order to resolve the physical, aesthetic and philosophical issues that may be present.

#### 3.1

Identify and critically analyse original construction process and technology.

#### 3.2

Identify and assess any constructional defects or damaged materials and decide the need for and use of specialists.

#### 3.3

Identify what work must be undertaken as a result of the investigations and assess the implications.

#### 3.4

Identify and assess the range of available repair techniques.

Forms of evidence may include:

- technical reports;
- survey reports;
- structural appraisals;
- procurement factors;
- defects diagnosis;
- condition assessment and investigative reports; and
- design work, including specification.



#### **Unit Four Social and Financial Issues**

A vital skill for a conservation practitioner is the ability to identify and understand the effects of a broad range of issues, social and financial issues that form part of the process of conservation intervention such as the level of the public's understanding of the site, factors affecting its significance and identifying and use of sources of funding. As well as formulating a conservation management strategy to protect the significance. Buildings and sites are valued because of their significance and representation to their current owner/user as well as local/national culture as a whole in the past, present and future and so any intervention should ensure that special values are protected.

Within this context, the site along with its specific qualities and requirements are of primary importance and should be used to guide any methodology and strategy developed in order to support their protection.

This unit is designed to assess a practitioner's expertise with respect to making balanced, defensible decisions with respect to their impact upon significance and contextual factors and that they are able to. develop these in order to resolve the social and economic issues that may threaten the significance of a site.

Candidates are required to demonstrate that they are able to:

- 4.1 Analyse and assess the value (evidential, historical, community and aesthetic) of a building or site.
- 4.2 Analyse public use, perception, expectation and public understanding of the site.
- 4.3 Identify, analyse and assess the impact of external factors affecting a site.
- 4.4 Understand and apply local and national government legislative controls.
- 4.5 Understand appropriate and sustainable re-use of a site.
- 4.6 Identify available sources of funding  
Forms of evidence may include:
  - survey and valuation reports;
  - feasibility studies and reports;
  - reports on technical or legal matters;
  - financial or economic appraisals;
  - funding applications;
  - applications for statutory and other consents; and
  - design work, including specification.

#### **Unit Five Implementation and Management of Conservation Works**

A conservation practitioner will have good working experience of adopting appropriate contractual and management methodology when implementing conservation works/projects. Candidates are expected

to demonstrate that they have adopted appropriate contractual arrangements, understanding cost control procedures and the need for appointing specialist contractors (when required) and can provide evidence of management methodology appropriate to conservation work.

Buildings and sites are valued because of their significance and representation to their current owner/user as well as local/ national culture as a whole in the past, present and future so any intervention should ensure that special values are protected.

Understanding the cultural significance of a site or asset is a vital skill for successful conservation and managing sensitive historical, architectural and archaeological issues. It will likely influence all aspects of construction such as scheduling cost control, procedures, contractor choice highlighting specialist skills required long with the issue of appropriate contractual arrangements specific to the requirements of each conservation works/projects.

This unit is designed to assess a practitioner's expertise with respect to implementing financial and managerial aspects of a conservation plan or project without damaging or compromising the cultural significance of the site, to put in place appropriate management methodologies to ensure its sustained use/re-use.

Candidates are required to demonstrate that they are able to:

- 5.1 Identify the extent and standard of work required, including need for suitable contractors or specialists.
- 5.2 Identify the most appropriate means of procuring and contracting the works.
- 5.3 Establish appropriate methods of recording and maintaining information.
- 5.4 Establish and evaluate costs and carry out appropriate cost control procedures.
- 5.5 Plan site inspections and manage change control as works proceed.
- 5.6 Develop short- and long-term maintenance and monitoring plans in accordance with the conservation management strategy.

Forms of evidence may include:

- construction process risk analysis;
- contractual and tender documentation or reports;
- cost planning and cost control documentation;
- photographic and other records of the works on site;
- maintenance plans; and
- monitoring and reviewing proposals/plans.





## 07. Submitting the completed portfolio

A panel of two Conservation Accredited Chartered Architectural Technologists normally conduct both the technical 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 candidate's 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.



# 08. Assessment

**Candidates must have obtained relevant conservation knowledge, experience and responsibility to a level that they can demonstrate the elements shown within the five units.**

The Assessors will judge each candidate's level of attainment of the elements against their area of work as described within their application and its importance.

## 8.1 Technical portfolio assessment

This will be assessed in the candidate's absence and so it is important to ensure that the portfolio is clearly laid out. Where evidence is used more than once, there should be clear cross-referencing.

Clarity and reference are more relevant than volume of evidence.

The candidate will be advised of the outcome in writing within six to eight weeks of the assessment. If the candidate has been successful, the candidate 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 behind the decision and any remedial action to be taken, including a recommended time for resubmission.

## 8.2 Formal interview assessment

This 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. If a laptop is required, the onus is on the candidate to make sure that the correct equipment is available.

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](http://www.architecturaltechnology.com)). It should not be necessary for the candidate to bring any additional material, unless it has been requested, following the technical 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 Central Office staff prior to an online interview. The interview should last around 45 minutes, at which point the Panel will deliberate in private. The candidate will be given the opportunity to either hear the result or be notified in writing. The decision will be either Pass or Referral. If successful, the candidate will be advised that once the annual fee has been received, they 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 behind the decision and any remedial action they might take, including a recommended time for resubmission.

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 in confidence on +44(0)20 7278 2206 or [conservation@ciat.global](mailto:conservation@ciat.global)



## 9. Re-entering the Register

After five years of Accreditation or in the instance of lapsed Chartered Membership, each Member will be re-assessed to confirm their competency 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 completing a pro forma as well as providing evidence of conservation related projects undertaken in the previous five years for which they have been responsible. If Accredited Members are not able to submit evidence of conservation work, conservation-specific CPD information would need to be submitted and candidates would be required to attend an interview.

## 10. Appeals

Any candidate wishing to appeal the decision to refuse admission to the Register 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**

The ICOMOS guidelines 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;
- 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;

Comité international de la Formation (CIF) is the International Training Committee of ICOMOS. The professional attributes that all conservation practitioners should have the ability to do 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;
- 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;
- m) recognise the need to position conservation decisions within national regulatory and planning policy frameworks, including environmental protection and climate change.



The [www.understandingconservation.org](http://www.understandingconservation.org) website 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.

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](http://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.



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