



Conservation Register

Candidate guidance notes

Contents

Introduction	3
Routes to Accreditation and designations	3
Eligibility criteria	4
Evidence requirements	4
Scheme outline	5
Submitting the completed portfolio	6
Assessment	6
Re-entering the Register	6
Appeals	6

I. Introduction

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

Chartered Architectural Technologists submitting for accreditation 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 and should be used in conjunction with the *Conservation Scheme Handbook*, which contains the requirements of the framework alongside typical evidence.

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.

2. Routes to Accreditation and designations

CIAT has two routes to Accreditation:

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 and also within the *Scheme Handbook*. Candidates can provide five projects or choose to use several elements of projects and projects must be no more than three 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 above.

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 above 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.

3. Eligibility criteria

It is important for scheme applicants to understand the philosophical approach that underpins good conservation intervention and be able to clarify the significance of the building before repairing/maintaining it to attain Accreditation.

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 (MCIAT).
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 the *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.

4. Evidence requirements

The typical evidence specific to each unit which could be submitted by a candidate seeking inclusion on the CIAT Conservation Register is outlined below. Evidence will be drawn from conservation projects for candidates seeking to become CIAT—Accredited Conservationists. For those seeking to become a CIAT—Recognised Conservationist (non-practising), the evidence must be in the form of five case studies. The CIAT suggested range of evidence (listed in respect of each unit) will provide useful guidance for candidates but it is not an exhaustive list.

CIAT strongly urges all candidates to visit understandingconservation.org for further guidance on the contents of the portfolio. This website has been developed as a self-assessment tool to test mindset, skills and competence prior to submitting a portfolio of evidence in pursuit of a common standard across the various professional institutes offering conservation accreditation.

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. 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.

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. The ability to recognise their own limitations and the need to be able to source, evaluate and appoint other specialist, but related professionals are essential to being a competent practitioner. 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.

Other information might include; curriculum vitae, educational qualifications, employment details and experience, professional qualifications, short courses, CPD records, publications and references.

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.

5. Scheme outline

There are five units within the scheme;

1. Philosophy of 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 Philosophy of 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. 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.

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

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.

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.

Unit Three Investigation, Materials and Technology

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.

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

It is necessary to investigate significance, coupled with a requirement to identify and analyse the effects of a broad range of issues, social, financial, funding and contextual together with other activities and formulating a conservation management strategy to protect significance. 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 threaten the significance of a site.

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

Understanding the cultural significance of a site is a vital skill for successful conservation and 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.

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.

6. Submitting the completed portfolio

A panel of three, two of whom must be Conservation Accredited Chartered Architectural Technologists and one other, who may be from a different profession but also an Accredited Conservation professional, normally conduct both the technical assessment and formal interview (although it may not be possible that both stages are completed by the same personnel). 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.

7. Assessment

7.1 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.

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.

7.2 Formal interview assessment

This will be based around two components:

1. the previously submitted portfolio; and
2. a brief presentation on the candidate's philosophy of conservation, as included within the submitted portfolio. If a laptop is required, the onus is on the candidate to make sure that the correct equipment is available.

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 ciat.org.uk). 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, driving license or company ID card. 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.

CIAT will take all reasonable measures to accommodate any request under the Equality Act 2010. If you have a particular need or requirement, please contact the Institute in confidence on +44(0)20 7278 2206 or conservation@ciat.org.uk

8. 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.

9. 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.

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