



THE INSTITUTE OF HISTORIC BUILDING CONSERVATION

MEMBERSHIP STANDARDS, CRITERIA & GUIDELINES

*(FORMERLY TITLED:
GUIDANCE FOR APPLICANTS:
APPLYING FOR FULL MEMBERSHIP OF THE IHBC)*

A successful application will demonstrate:

- professional experience in one or more areas of historic environment conservation
- informed understanding of the values and principles of conservation, and
- an understanding of how these shape advice and outcomes in the historic environment.

Full Members balance specialised professional skills in one or more areas of historic environment conservation with more general experience and theoretical knowledge in others. The institute encourages members to develop a working knowledge of all aspects of historic environment conservation through their own continuing professional development (CPD). CPD has been mandatory for Full Members of the IHBC since April 2005

Applicants for Full Membership of the IHBC are encouraged to contact branch or national officers to identify an IHBC member who will act as mentor for their application.

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PART 1: INTRODUCTION TO PROFESSIONAL CONSERVATION STANDARDS

1 Introduction: The Historic Environment Conservation Professional & the IHBC

This paper tells you what you need to know when preparing your application to become a Full Member of The Institute of Historic Building Conservation (IHBC). Please read it before making your application. If you have any queries please discuss these with the IHBC's staff at the national office.

You should join the IHBC if you have direct professional involvement with any aspect of the conservation of **the historic environment**, including working with traditional or historic buildings, areas, settlements, landscapes or sites. If you are professionally active in historic environment conservation you should apply to join the IHBC as a **Full Member**. This will confirm your standing as an historic environment **conservation professional**, and help ensure that your work satisfies modern codes, such as the IHBC's Code of Conduct, and standards, such as the ICOMOS guidelines on training needs for conservation professionals.

If you hope to become a Full Member, but lack experience, you should first join as an **Affiliate Member**. Also if you have the experience, but struggle to find time to complete the application process for Full Member, we strongly recommend affiliate membership as an interim membership class. Even for well-qualified professionals, reinforcing your application for full membership with a period of membership as Affiliate Member will help inform your understanding of the standards required in the application process. So whether trainee, early career or busy skilled professional, affiliate membership will let us help you develop a successful application for full membership.

If you are not professionally involved in conservation or a relevant specialism, but you do have a broad interest or involvement in the area, you may become an **Associate Member**. Associate members support the work of the IHBC, including our charitable activities and observing our professional code, and benefit from our services, but do not receive the professional support offered to Full Members.

Application forms for all membership classes can be found on our website, at www.ihbc.org.uk.

1.1 Demonstrating your Professional Standards

Applicants for full membership must use the institute's official membership application form. The completed form should demonstrate how you have played a **responsible professional role** in one or more aspects of historic environment conservation, describe the full extent of your relevant **skills, knowledge, experience** and **understanding**. It should refer to relevant examples or cases, and explain how your work has been informed by professional challenges in conservation. Formal training, learning, and **continuing professional development (CPD)**, should be identified. You may supplement the application with evidence such as certificates, diplomas, CPD certificates, and records of your work. Case studies of problems and issues can also be very useful.

Your form must demonstrate a level of experience equating to at least five years of professional activity in historic environment conservation, or at least two years if supplemented by a recognised conservation course (see www.ihbc.org.uk).

Usually, an applicant will have core experience or training in one or more disciplines relevant to conservation, as discussed below, and supplement this with significant specialist activities specific to conservation practices. **You are not expected to have in-depth professional experience in all aspects of conservation.**

It is essential to describe your widest relevant experience. You may find it useful **to refer to sources identified on our website's membership pages**, linked from the home page on our web site. Our **CPD Registration Form**, posted there, provides a template for this as it guides professional development in line with our membership standards and criteria.

However to appreciate our conservation standards, applicants must first appreciate how the IHBC fulfils its objectives as a charitable organisation dedicated to the conservation of the historic environment.

1.2 Conservation in a sustainable environment and the conservation professional

Society conserves valued and historic places because we find in them a wider resource for people's benefit, both today and for the future. Conservation of these places is sustainable only when they have a viable, sympathetic and beneficial future. There are many interests in securing that future, including owners, educators, and business and public interests.

Successful conservation works with all the interests that shape and secure historic places. The skills needed for conservation are correspondingly large. However as no-one can have all the necessary skills, the conservation professional must be able to work across different special interests as well as within their own particular area of expertise. Often, the expertise of the conservation professional is a special capacity to work with other professionals, co-ordinating different priorities to secure the best possible future for historic places.

Historic environment conservation professionals provide informed and specialist advice that helps us enjoy, care for and benefit from historic places in a sustainable environment. Frequently conservation professionals are trained in more than one discipline, and will often work in multi-disciplinary environments. They must appreciate the different values that people can attach to places, understand the processes that maintain and enhance those places, and shape the activities that change them. Conservation professionals cannot control all the factors that impact on a place – nor should they think they do - but they will have particular skills that contribute to the conservation of places.

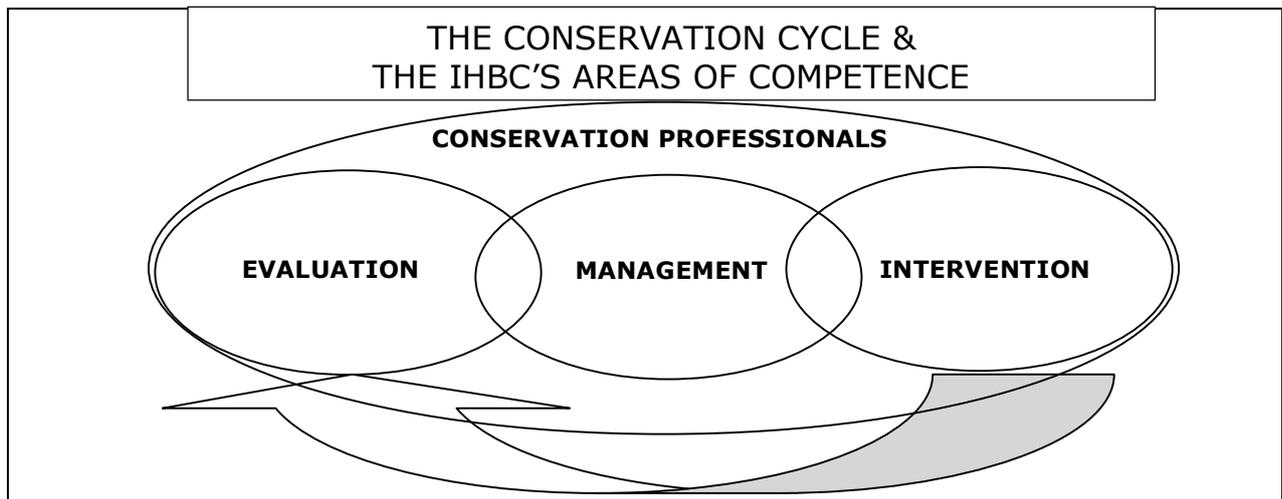
At the heart of their own specialist roles, an historic environment conservation professional working must possess and display:

- ◆ **informed knowledge of all the complex issues that can secure or threaten historic places**
- ◆ **understanding and appreciation of how sustainable conservation can be achieved in society,**
- ◆ **capacity to access, interpret and apply the specialist skills, advice and services of others where appropriate, and**
- ◆ **a knowledge of their own limitations.**

As a properly informed conservation professional will source relevant advice to a proper quality, evaluate it, and use it effectively to inform their own specialist work, they must understand how conservation in the historic environment operates.

1.3 The conservation cycle and the IHBC's Areas of Competence

Conservation occurs in a cycle that recognises the inevitability of change, and tries to manage that change in the cause of conservation. That conservation cycle begins with **Evaluation**, which helps people understand what should and could be conserved, why it should be conserved, and in what fashion. Evaluation informs and shapes the **Management** of the historic environment. Management develops and applies practical and sustainable systems that conserve places, including policies, legislation and investment. **Intervention** is the part of the conservation cycle that promotes beneficial change to what is being conserved, such as restoration projects, regeneration and the design of new works in historic areas.



Though the three phases of the conservation cycle are inter-dependant and iterative, they do mark key milestones within that cycle. Consequently **Evaluation, Management and Intervention equate to the main areas within and across which conservation professionals operate their specialist skills.** To specify the complex range of operations that must work in harmony to secure successful and sustainable conservation, **the IHBC applies the phases of the conservation cycle as the framework for assessing and supporting our members, our Areas of Competence.** Consequently, **the IHBC's Areas of Competence – Evaluation, Management and Intervention – define the standards and criteria for our professional membership.**

The IHBC's Areas of Competence have evolved out of, and equate to, **national and international standards in conservation.** They can also be mapped to a range of highly respected and practical frameworks & models, international, national and local. These include the **World Bank's standards for environmental management, the ICOMOS training framework, Egan's 'Sustainable skills' for sustainable communities and, more recently, research into the operational structures of local planning authorities.**¹ The following table summarises some of the inter-relationships and inter-dependencies between the IHBC's standard of membership and wider management models:

FRAMEWORKS & MODELS	SUSTAINABLE COMMUNITIES		
IHBC Areas of Competence & Competences (discussed below)	EVALUATION (HISTORY; RESEARCH, RECORDING & ANALYSIS)	MANAGEMENT (LEGISLATION & POLICY; FINANCE & ECONOMICS)	INTERVENTION (TECHNOLOGY; DESIGN & PRESENTATION)
World Bank, Environmental Assessment Sourcebook, Update 8, 1994	Project stages 		
Egan's Components of Sustainable Communities.	SOCIAL & CULTURAL GOVERNANCE (INFORMED)	GOVERNANCE SERVICES ENVIRONMENTAL	ECONOMY HOUSING & BUILT ENV. TRANSPORT AND CONNECTIVITY
Atkins' Local Authority Officers, 2006	EDUCATION OFFICER	HISTORIC ENVIRONMENT OFFICER	REGENERATION OFFICER
Egan Skills	Egan generic skills apply across conservation specialisms (the IHBC's 'Competences')		

¹ See e.g. World Bank, Environmental Assessment Sourcebook, Update 8, 1994 (<http://go.worldbank.org/541FG6IVA0>) and relevant papers & resources posted on or linked from our website: www.ihbc.org.uk

1.4 Membership Standards: The Areas of Competence and the competences

The IHBC uses the Areas of Competence to assess membership applications.

While specialised skills in one part of the conservation cycle will compensate for more general or theoretical experience in another, **successful applications must demonstrate an individual's understanding and awareness across the full range of the areas of competence.**

Conservation professionals in the IHBC must **be prepared to develop and apply their knowledge of the entire process of historic environment conservation. This ensures that their specialist advice is properly informed by the wider processes that shape historic areas and places.** The institute operates specific membership standards and criteria in order to assure the quality of advice from its members. Existing members are required to carry out an ongoing programme of training in accordance with our continuing professional development (CPD) programme. Prospective members must demonstrate their capacity to operate to a proper professional and ethical standard in historic environment conservation. In both cases the IHBC structures its assessment in terms of the main elements of the **Areas of Competence** and their corresponding **Professional** and **Practical Competences**.

A conservation specialist must be competent both in terms of appropriate professional, regulatory and ethical standards (the IHBC's **Professional Competences**), and have a substantial knowledge of one or more areas of specialist interest relevant to historic environment conservation, (the **Practical Competences**).

Professional competences are those abilities expected of all professionals working in conservation. These require an understanding of the **Philosophy** of conservation, and its application in responsible professional **Practice**.

Practical competences correspond to a specialist knowledge of work in one or more areas within the conservation cycle: the evaluation of the resource, its management through conservation strategies, and where appropriate, the intervention that will secure beneficial change. As with any part of the conservation cycle, these areas of competence must be applied by a conservation professional in the context of historic environment conservation priorities rather than as simply for the sake of alternative specialist or academic interest.

AREAS OF COMPETENCE:	PROFESSIONAL	PRACTICAL: EVALUATION	PRACTICAL: MANAGEMENT	PRACTICAL: INTERVENTION
COMPETENCES:	PHILOSOPHY	HISTORY	LEGISLATION & POLICY	DESIGN & PRESENTATION
	PRACTICE	RESEARCH, RECORDING & ANALYSIS	FINANCE & ECONOMICS	TECHNOLOGY

Specialist areas in **Evaluation** include the application of the methodologies of **History** in the conservation cycle. An informed knowledge of the **History** and prehistory of architecture, structures, settlements and places of all periods provides an essential framework for understanding cultural context, meaning and significance. This in turn helps identify why conservation is appropriate, what should be conserved, as well as how this might be done. To secure informed conservation for the future, this must be integrated with investigative skills and standards, activities that help interpret or capture some of that meaning and significance. These include principles and processes of **Analysis, Research** and **Recording**. Together these underpin the interpretation and evaluation of historic places.

Informed **Management** underpins the effective conservation of places and fabric. To transform the evaluation of historic places into practical, realistic, viable and sustainable conservation, it is essential that there is a deep understanding and experience of the **Legislation and Policy** that shapes the conservation cycle. Similarly, conservation

initiatives, particularly projects and the development of policies, must be developed around an awareness of the limits and opportunities in the **Finance and Economics** of conservation, as these represent the systems through which society secures the conservation of our valued places.

If conservation involves **Intervention**, it will require additional investment, directly or, through controls and restrictions, indirectly. The conservation professional must be able to show the benefits that conservation standards can bring to managing change. These can involve justifying the extent of new developments to community interests, or encouraging developers to invest in more respectful materials or designs. In either case competences in **Design and Presentation** ensure that conservation remains as an outcome that communities and stakeholders as a whole can appreciate and support. The understanding of **Technology**, historic and modern, underpins all aspects of the conservation cycle, for obvious reasons, but is particularly relevant to **Intervention** as it will ensure that the technical realities of the built environment are respected and accommodated in any proposals.

PART 2: DEMONSTRATING COMPETENCE

2.1 HOW DO I APPLY FOR IHBC MEMBERSHIP?

To apply for Full Membership of the IHBC you must demonstrate your abilities through the Membership Application Form. You should include your educational, training and professional experience. Your conservation skills, knowledge, experience and understanding should be interpreted in the context of the Areas of Competence, as discussed above, supplemented as appropriate by reference to activities, training, projects, voluntary service or other relevant experiences. These should demonstrate the level of your respective abilities relevant to conservation. Independent support and validation for your work is then presented through endorsement by your peers.

Professional standards endorsed by external bodies (for example other professional institutes) are an important demonstration of relevant specialist skills and knowledge. The IHBC does acknowledge that some professional standards are less easily defined, such as for architectural historians.

You must provide evidence of **relevant professional and non-professional activities**, incorporating as appropriate critical reflections on your achievements. You must convey these experiences in your application, presenting training, education, voluntary activities and professional operations that confirm your intellectual engagement with the challenges of historic environment conservation.

Conservation is a wide-ranging multi-disciplinary activity, and different conservation professionals will bring different strengths and special interests to the role, whether as specialists in a field, or as specialised generalists working across a number of areas. This can be reflected in their balance of experience, but knowledge and understanding across all the areas must be captured too. This balance between special interests and general knowledge of the areas of competence is recognised in the institute's constitution.

Substantial specialist experience in all the areas of practical competence is not essential, and indeed quite uncommon. However, particularly where skills have been developed in the context of project teams, applicants are encouraged to refer to the forthcoming guidance framework provided in the 'Units' of the Edinburgh Group (still under development), as a means of interpreting their personal experience of the Historic Environment in the context of team operations (see www.understandingconservation.org)

2.2 WHAT ELSE SHOULD I KNOW?

2.2.1: Regulating and Monitoring IHBC Members

Full Membership of the IHBC confirms that an individual has attained a balance and level of skills, knowledge, experience and understanding to advise on and, where suitably skilled, to carry out professional operations in historic places.

The IHBC membership is regulated primarily through the application of the Institute's Code of Conduct, while members must adhere to such Standards and Guidance as the Institute issues, agrees or applies. The Institute is working in partnership with others to agree inter-professional standards and guidance.

For Full Members, standards are monitored through the review of their Continuing Professional Development (CPD), a mandatory programme for all members, as detailed on our web site.

2.2.2 Accreditation and National Occupational Standards

As yet there is no recognised accreditation in Britain for conservation professionals operating across the IHBC's **Areas of Competence**. There are important accreditation and certification schemes run by other professional institutes for particular professional skills, such as in architecture and surveying. The IHBC fully supports and endorses such programmes for raising standards and skills within their respective professions.

2.2.3 The Application Form

The Application Form

You should allow anything from one to five days for completion, depending on your experience and access to material. If you find some parts easier than others, this probably reflects the fact that your strengths are not comparable across the competences. This is not necessarily an issue of concern – skills in one area will often outweigh those in another – but it may be something you will want to address as your career develops.

Prior to submitting the form, we recommend that you take advice from the national office (membershipservices@ihbc.org.uk), the local branch (see www.ihbc.org.uk for branch contacts), a local member of your acquaintance, or a branch officer, as this will help you reflect on your experience in the context of conservation practice, and convey that in the application form. We also supply a list of references and resources at the end of this guidance that may help you in your thinking.

You are strongly advised to:

- Complete all sections of the application
- Include all relevant detail, even if it seems obvious
- Avoid copying a standard CV
- Clarify how any qualification informs your conservation work
- Be concise
- Aim for good, preferably electronic presentation,
- Seek guidance about anything you do not fully understand

Completion of the application form is part of the demonstration of competence, so the neater and better presented the form, the more effectively it will display an appropriate professional standard. As IT skills are presumed, completion and submission of applications using modern technology – and our downloadable application form – will demonstrate skills.

If you do apply to become a Full Member, but instead council recommends that you are offered Affiliate status, you should not be deterred. If you have adequate skills and experience, the problem may well be that the application form did not adequately demonstrate these. We provide detailed feedback as a matter of course.

A common issue is the failure of a skilled conservation professional to demonstrate in detail their experience through the form. Similarly, conservation professionals early in their career frequently omit information from the testimonial because they think it too insignificant, or too obvious. However, as in conservation, detail is important. It is essential that you focus on providing a comprehensive and clear presentation of your competences in the application form.

Successful applicants will have demonstrated their achievement of a suitable balance of the competences in their application. Regardless of an applicant's experience, renown or recognition, appropriate details, references and supporting information should be provided in the application to ensure that the committee, and the council, can make informed decisions.

2.2.4 How we assess applications

The Membership Committee considers applications. As well as considering the ability of the candidate to meet the institute's competences, IHBC Branches can feed direct knowledge into the process by providing local advice and experience. The institute's Membership Secretary collates responses to applications and makes recommendations to the IHBC Council for final determination.

2.2.5 And finally... we look forward to welcoming you to the IHBC

And of course we wish you every success in your career, however you want to develop your conservation interests, whether as Full Member of, if more appropriate, Associate, or, for the moment, Affiliate. We appreciate it takes some time to prepare your submission, but do remember that, if you have taken the trouble to apply, we will do our best to help you through the process.

APPENDIX: THE IHBC AREAS OF COMPETENCE & COMPETENCES

AREA OF COMPETENCE: PROFESSIONAL

Applicants must demonstrate competence in Philosophy (1) and Practice (2)

1. PHILOSOPHY

Appreciation of the social, cultural, political, aesthetic, economic and environmental values that underpin current conservation policy and practice.

To be fully conversant with currently prevailing national and international principles and philosophies of conservation including guidelines adopted by ICOMOS, BSI and other recognised bodies.

2. PRACTICE

Awareness of the wider context of conservation, including knowledge of and ability to interact effectively with all bodies and individuals who have a significant role to play in the field.

To be familiar with the roles, responsibilities and potential of all bodies and individuals within public, private and voluntary sectors who have a significant heritage management role.

To be able to establish and maintain good contact with and seek specialist advice from other organisations and individuals both within and outside the conservation field and inform others of the availability of such advice.

To be able to interact and negotiate effectively with all groups and individuals with an interest in the historic environment, including community and amenity groups, elected representatives, clients, applicants and officials.

AREA OF COMPETENCE: PRACTICAL – EVALUATION

Applicants must demonstrate competence in History (3) and Research/ Recording/ Analysis(4)

3. HISTORY

Knowledge of the development of the historic environment including the remains of previous periods and cultures, historic buildings and settlements, work of engineering, parks, gardens and other elements of the historic landscape.

To be able to assess the significance of sites, structures, buildings and areas and carry out both visual and archival research and make recommendations based on such assessment.

To be able to advise on the special importance and the suitability for designation, listing, scheduling or other means of protection of the above features.

To be able to assess the significance and impact of development proposals on the above features.

4. RESEARCH/RECORDING /ANALYSIS

Ability to carry out or commission research, analysis and recording of the historic environment, and to maintain records accordingly.

To be able to advise on appropriate techniques and levels of recording required for historic buildings or sites affected by development proposals and identify the most appropriate bodies or individuals to undertake such work.

To be able to make rapid and emergency recording of buildings and groups of buildings

affected by development proposals including archival research.

To be able to plan, prepare and execute a programme of detailed recording of structures and sites affected by development proposals, including photographic and graphic representation using conventional drawing techniques and/or CAD.

AREA OF COMPETENCE: PRACTICAL – MANAGEMENT

Applicants must demonstrate competence in Finance & Economics (5) and Legislation/Policy (6)

5. FINANCE & ECONOMICS

Understanding of the process for the procuring of buildings and facilitating development, including finance, valuation, cost planning and contracts, with specific reference to historic buildings and areas.

To understand the process by which decisions are made on investments in conservation projects and the factors affecting such decisions. Specifically, familiarity with the workings of the property market and methods of valuation.

To be familiar with the contractual aspects of conservation work including differing forms of contract, costing of conservation works and VAT.

To be familiar with the principles of regeneration, the bodies responsible for it and of sources of funding which can be used for the repair of historic buildings, and the ability to seek and use resources effectively.

To be able to promote or generate investment in the historic environment from both public and private sources and to maximise opportunities.

To be able to advise on conservation grant availability and be fully conversant with the administration of grant schemes for the repair and enhancement of historic buildings and areas.

To be familiar with, and be able to advise on, the range of available funding schemes not specifically aimed at conservation including:

- National Lottery
- European funding
- central government regeneration budgets
- other partnership schemes

6. LEGISLATION/POLICY

Knowledge of the legislative and policy framework for the conservation of the historic environment, its formulation locally and nationally, and awareness of other relevant legislation and policies.

To be able to provide advice and guidance on all current legislation and central government advice affecting the protection of the historic environment to employers, clients, public, other professionals and statutory and non statutory organisations.

To be able to advise and negotiate in connection with applications for listed buildings, scheduled monument and conservation area consent and planning permission and other statutory consents.

To have a working knowledge of other legislation insofar as it affects the historic environment including Building Regulations, town planning and highways legislation.

To be able to act as the employer's/client's expert witness, as appropriate, at appeals, public inquiries or court hearings.

To be able to appreciate the status of an application of differing types of policy documents.

To be able to draw up, implement and monitor conservation policies and strategies in the context of either local or national frameworks and to be able to advise on the conservation implications of other policies.

<p>AREA OF COMPETENCE: PRACTICAL – INTERVENTION Applicants must demonstrate competence in Design/Presentation (7) and Technology (8)</p>
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7. DESIGN/PRESENTATION

Ability to analyse and evaluate quality of design, existing and proposed, of buildings and areas, and to present the results of such analysis in a way accessible to both professional and lay audiences.

To have a detailed appreciation of the principles of townscape and urban design and to be able to undertake analysis accordingly.

To be able to communicate design concepts by means of sketching, conventional drawing techniques and/or CAD.

To be able to promote high standards of design of individual buildings or areas by:

- drawing up and implementing schemes
- preparing design guidance/briefs.

To be able to prepare schemes of enhancement works including streetworks and landscaping.

8. TECHNOLOGY

Knowledge of building construction of all periods, the characteristics of structures, the nature and properties of building materials and appropriate methods of repair and alteration of historic fabric.

To be able to advise on appropriate methods for the repair and maintenance of historic buildings, including advising on specialist repair techniques and the availability of materials and skills both locally and nationally.

To be able to advise on the physical and chemical characteristics of building materials and causes of decay.

To be able to assess and monitor the condition of buildings, diagnose defects and to specify and prioritise proposals for their repair, maintenance and enhancement

To be able to undertake both rapid and more detailed assessment of building condition, including Buildings at Risk Surveys.

To be able to audit and monitor the general condition of fabric within whole areas with a view to formulating strategies for action.

To be able to advise on new and developing techniques in conservation and their practical implications.