

Edinburgh Group: Terms of Reference:

Final Version: 8 November 2023

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Edinburgh Group: Terms of Reference

Final Version: 8 November 2023

The Edinburgh Group:

The Edinburgh Group (the Group) is an overarching pan-professional body of architectural conservation related professional institutes and organisations. It includes representative client and official UK and RoI heritage bodies and International interests. Its purpose is to assist in facilitating the roles, benefits, and developments of all member body Architectural Conservation Accreditation/Certification Schemes to enhance the operational competences of practitioners, this for the future well-being of the built heritage, its setting, and environment.

Initiated in 1999 by the activities of the *Scottish Accreditation Working Group* its mutually agreed remit evolved via a time-served *York Group* in 2002. It has been supported by COTAC since 2008. At its core is the acceptance, promotion and continuing relevance of the 1993 ICOMOS Education and Training Guidelines.

Aims:

The Groups' Aims are:

- to meet 6-monthly in May and November each year
- to help assure commissioning clients that Conservation Accredited/Certified practitioners have been peer-reviewed and determined 'competent' to practice in architectural conservation within their professional discipline.
- to help assure that mutually accepted professional 'equivalence' exists across all current and future built heritage conservation Accreditation/Certification Schemes

Objectives:

Representing the range of professional bodies and related organisation interests, the Group's mutually agreed objectives are to help:

- enable the various professional body peer-reviewed built heritage Conservation Accreditation/Certification Schemes to operate with common principles
- facilitate the transfer of relevant skills, knowledge, and experience in the field of Architectural Conservation

Intentions:

The Group's intention is:

- to encourage a continuing common approach towards the development, equivalence, monitoring and promotion of built environment conservation accreditation and certification schemes for individual practitioners on a pan-professional basis.
- to acknowledge the wider conservation context and related initiatives occurring within the sector.

Edinburgh Group: Working Remit

The Edinburgh Group will be inclusive of all relevant professional institutes and organisations that administer conservation accreditation schemes across the UK and the Republic of Ireland. It will also accept future representation from other bodies or organisations that devise and promote related accreditation/certification schemes in accordance with the Group's Aims and Objectives. *(Note: In use of the joint 'accreditation/certification' term, 'certification' is adopted by RICS and CIOB to avoid confusion with their other established 'accreditation' schemes).*

Chronologically listed when the various conservation accreditation/certification schemes were launched, Edinburgh Group participation includes representation from:

- 1992 Royal Institution of Chartered Surveyors (RICS *Cert*)
- 1995 Royal Incorporation of Architects in Scotland (RIAS)
- 1998 Architects Accredited in Building Conservation (AABC)
- 1998 The Institute of Conservation (Icon)
- 2000 Institute of Historic Building Conservation (IHBC)
- 2001 The Royal Institute of the Architects of Ireland (RIAI)
- 2003 Conservation Accreditation Register for Engineers (CARE)
- 2003 Engineers Ireland (EI)
- 2008 Chartered Institute of Architectural Technologists (CIAT)
- 2010 Royal Institute of British Architects (RIBA)
 - 2010 Royal Society of Architects in Wales (RSAW)*
 - 2010 Royal Society of Ulster Architects (RSU)*
- 2017 Chartered Institute of Building (CIOB *Cert*)
- 2021 Society of Chartered Surveyors Ireland (SCSI)

Participating Key Official Client Interests Bodies include representation from:

- Cadw (Wales)
- Department of Environment, Food and Agriculture (Isle of Man)
- Department of Housing Local Gov & Heritage (RoI)
- English Heritage (EH)
- Historic England (HE)
- Historic Environment Division NI Dept. for Communities (NI)
- Historic Environment Scotland (HES)
- Northern Ireland Environment Agency (DOENIEA)
- Office of Public Works (OPW)

In addition, participation and representation is included from the:

- Chartered Institute for Archaeologists (CIfA)
- Church of England (CoE)
- Conservation Course Directors Forum (CCDF)
- Ecclesiastical Architects and Surveyors Association (ESA)
- ICOMOS International Training Committee (ICOMOS CIf)
- National Trust (NT)

As appropriate, participation will include additional relevant parties, including engaging with individual professional Observers with a specific interest in accreditation developments, and who can contribute to the Group's intentions.

The Group's underlying principle will be to help assure commissioning clients that accredited practitioners have been determined 'competent' to practice in conservation work and activities by their professional body. This competence should be determined in accordance with the published and accepted '*1993 ICOMOS Education and Training Guidelines*' and through peer-review processes of their respective accreditation/certification scheme mechanism including acceptance of their '*Codes of Professional Conduct*'.

In appropriate official grant-aided circumstances the accredited practitioners' assessment schemes and procedures should also be in accordance with the official UK Home Countries Protocol, dated December 2016 [attached at Annex A], and the related 2020 *ChurchCare Guidance Note on Commissioning Quinquennial Inspection Reports* [Extract attached at Annex B]

In pursuing the Group's approach, it will encourage pan-professional uniformity across the range of historic built environment accreditation/certification schemes to help:

- ensure a peer-reviewed consistency of approach, standards used and defined outcomes of original applications and subsequent re-accreditation
- refine and monitor the dependability of the various assessment processes
- maintain transparency and accountability in the processes
- increase the number of practitioners eligible for accreditation
- maintain a formal method of approach relative to deferral/refusal
- monitor the introduction and development of structured support CPD programmes
- encourage the creation of a pan-professional database of all accredited individuals
- promote endorsed lists of accredited practitioners.

In the application of these issues, the Group has previously reviewed the requirements of each Conservation Accreditation Scheme run by its member bodies and is regularly kept up-to date with associated developments during its six-monthly meeting cycle. This activity builds upon the May 2016 analysis of the *UK Conservation Accreditation and Membership Schemes for Professionals* compiled by The Council on Training in Architectural Conservation (COTAC) for Historic England.

Equivalence

A high degree of commonality already exists across the various UK and RoI in the operation of the various Conservation Accreditation/Certification Schemes and could form the basis of mutually agreed developments into a more formal recognition of '*Equivalence*' in accredited status. This includes:

The need for the individual applicant to be:

- Pre-qualified in a professional discipline
- Appropriately Registered to practice

- Abiding by a Code of Professional Conduct
- Maintaining a CPD record of (focused) Conservation orientated study
- Appropriately knowledgeable and experienced skills commensurate with application
- Compiling and submitting a relevant CV with an emphasis on Conservation matters
- Conversant with the 1993 ICOMOS Education and Training Guidelines

The need for the accreditation process within the professional body to be:

- Peer reviewed and verifiable through informed and moderated Assessors
- Informed by a rigorous approach (including a Skills Matrix)
- Guided by and incorporating the ICOMOS E+T Guidelines
- Undertaking regular reassessments of applications
- Recognising the understandingconservation.org website support materials
- Offering a Complaints/Appeals process should that be required
- Complying with Data Protection legislation appropriate to the relevant country

Specifically, in pursuing the aim of achieving explicit *Equivalence* across the various Conservation Accreditation/Certification Schemes, the follow overarching principles apply:

- Applicants must be a suitably qualified and experienced member of their relevant Registering organisation and/or associated professional institute.
- Applicants must complete the necessary assessment as mandated by their respective Accreditation/Certification Scheme to demonstrate their level of competence.
- Assessments are measured against published Scheme criteria, all of which incorporate and adopt the 1993 ICOMOS Education and Training Guidelines for application and assessment purposes.
- Accredited Members must maintain appropriate membership of their Registration and/or host professional institute/body and abide by its Code of Conduct. Should they resign or retire, their related accredited status from that body will lapse.
- Applicants must provide evidence of relevant conservation orientated Continuing Professional Development undertaken in advance of their original application process and, subsequently, as part of a reassessment process.

The Group notes that some Schemes offer a tiered system, whereas others offer only one level. For clarity and the avoidance of doubt, it is considered that those at the highest level attainable for each Scheme are recognised as being ‘equivalent’ to each other and should be accepted as such by external bodies. [Current on-line Conservation Accreditation/Certification Scheme Guidance and Application documentation is listed in Annex C].

Complaints and Appeals

Whilst the collective Group aims to promote a mutual influence and direction across the range of accreditation/certification schemes on offer, each participating profession and body will maintain its own approach to ensure appropriate professional standards are upheld, effective monitoring of their scheme is pursued and that practitioners operate ethically in accordance with their profession or body’s Code of Conduct, where each organisation will also be responsible for dealing with any associated complaints and/or appeals involved in upholding the quality and relevance of their scheme.

Annex A: Home Countries Conservation Accreditation Requirements.

Agreed Protocol: December 2016

Requirement by the UK Home Countries Heritage Bodies for the lead professional role on their repair grant schemes to have conservation accreditation

Department for Communities Northern Ireland, Historic Environment Service (Cadw), Historic England and Historic Environment Scotland support the requirement for an applicant for their repair grants to employ a lead professional advisor with relevant specialist conservation knowledge, ability and experience.

The lead professional advisor is required to deliver a range of services relating to repair grants which are described in the grant application information. These include analysis of condition, investigations, planning and specifying the work, and inspecting and certifying the work while it is in progress and after it is completed.

To be recognised as eligible to be the lead professional advisor on their repair grants an individual needs to satisfy the UK Home Countries Heritage Bodies that:

- i. Their professional training and competences will enable the delivery of the services required of the lead professional in their grant schemes. &
- ii. Their conservation accreditation scheme meets the following criteria:
 - Accreditation of individuals rather than companies or practices
 - Schemes should be open to all suitably qualified and experienced members of the relevant professional disciplines
 - Assessment of a verifiable record of work carried out demonstrating experience and competence
 - Assessment by suitably experienced, impartial assessors against agreed criteria together with reassessment on a regular basis
 - The use of the ICOMOS Guidelines for Education and Training in the Conservation of Monuments, Ensembles and Sites
 - An ethical and linked disciplinary framework to ensure that standards are observed and maintained

Historic England and Historic Environment Scotland both operate this requirement on their repair grants. Cadw will introduce the requirement from January 2018. From April 2017, the Historic Environment Division of the Northern Ireland Department for Communities will have the same requirement for proposals seeking support of £10,000 or more from its Historic Environment Fund.

Background

Conservation accreditation schemes for professionals are developed and operated by professional bodies and independent organisations. Each scheme has its own application and assessment process. Becoming accredited involves submitting evidence of an individual's experience and competence, which is assessed by suitably experienced and impartial assessors. Most schemes use the International Council on Monuments and Sites' (ICOMOS) Guidelines for Education and Training in the Conservation of Monuments, Ensembles and Sites as the basis for their assessment of candidates' experience. However, the schemes vary in their entry and re-accreditation requirements.

December 2016



Annex B: Church Care Guidance Note: Commissioning Quinquennial Inspection Reports

Guidance Note

Commissioning Quinquennial Inspection Reports

ChurchCare



16,000 buildings. One resource



Guidance Note Page 2 Extract: Highlighting Conservation Accreditation Requirements

Appointment of a Quinquennial Inspector

*The appointment of a Quinquennial Inspector is made by each PCC, and is always of an individual, not a firm. The appointment is for one inspection and report in the first place. It is important that a Quinquennial Inspector's **training, accreditation and experience** in building conservation is commensurate with the complexity and significance of the church building(s) in question.*

Criteria for appointing a suitable person to the role of Inspector

- *Competent to inspect **Major Churches** (as defined by the CBC) which includes what used to be Greater Churches; proven experience of working with such large and/or highly significant and complex church buildings is recommended, at least at a junior level under a more experienced professional; and experience of working on Grade I or II* church buildings in a sole capacity. Relevant accreditation would normally be required, and always for professionals undertaking their first Inspector role.*

- *Competent to inspect **Grade I or II* churches**; proven experience of work in a sole capacity with listed buildings; proven experience of work with such highly designated church buildings at least at a junior level under a more experienced professional; preferably experience in sole capacity. Relevant accreditation would normally be required, and always for professionals undertaking their first Inspector role.*
- *Competent to inspect **Grade II churches**; proven experience of work in a sole capacity with listed buildings; preferably experience of working with listed church buildings at least at a junior level under a more experienced professional. Relevant accreditation would normally be recommended, and always for professionals undertaking their first Inspector role.*
- *Competent to inspect **unlisted churches**; no specific prior experience expected, but evidence of supervision from an experienced professional with experience of church buildings is recommended. For certain buildings, evidence of experience of working with traditional materials may be required.*

The complete Church Care Guidance Note and related documentation can be found at:

<https://www.churchofengland.org/more/church-resources/churchcare/advice-and-guidance-church-buildings/quinquennial-inspections>

Annex C:

Conservation Accreditation/Certification Scheme on-line Documentation e-bibliographic List [All URL's accessed 23 March 2023]

Royal Institute of British Architects (RIBA)

<https://www.architecture.com/education-cpd-and-careers/membership-and-accreditation/join-the-riba-conservation-register>




<https://www.architecture.com/education-cpd-and-careers/membership-and-accreditation/join-the-riba-conservation-register/recognised-courses-for-the-riba-conservation-register>

<https://www.architecture.com/about/policy/conservation>

<https://riba-academy.architecture.com/ilp/pages/description.jsf#/users/@self/catalogues/150435/programmes/721594/description>

RIBA Related downloads:

Useful guides to the RIBA Conservation Register

		
Conservation Resources View more about RIBA and conservation, including our initiatives, resources, expert groups	Conservation Pathway Download our RIBA Conservation Register CPD Pathway for a non-exhaustive list of helpful courses/CPD recommendation to hone your conservation skills	Conservation Handbook Download our Conservation Register Handbook to read the guidance, criteria and requirements for accreditation

Associated Links (outdated):

Royal Society of Architects in Wales (RSUA)

<https://www.architecture.com/knowledge-and-resources/knowledge-landing-page/do-you-value-conservation>

Royal Society of Ulster Architects (RSUA)

<https://rsua.org.uk/events/past-events/conservation-accreditation/>

<https://rsua.org.uk/events/continuous-professional-development/informed-conservation/>

Register of Architects Accredited in Building Conservation (AABC)

<https://www.aabc-register.co.uk/about>

<https://www.aabc-register.co.uk>

<https://www.aabc-register.co.uk/apply/online-application-portal>

<https://www.aabc-register.co.uk/apply/forms>

<https://www.aabc-register.co.uk/apply/applicant-seminar>

AABC Related Downloads:

Guidance Notes for AABC Applicants

<https://www.aabc-register.co.uk/apply/guidance-notes>

https://www.aabc-register.co.uk/uploads/AABC_Guidance_Notes_for_Applicants_2019.pdf

Guidance Notes for AABC Mentor Scheme Applicants

<https://www.aabc-register.co.uk/apply/apprenticeship>

https://www.aabc-register.co.uk/uploads/AABC_Mentor_Scheme_Guidance_Notes_2022.pdf

Mentor Scheme Activity Programme

<https://www.aabc-register.co.uk/apply/apprenticeship>

Guide to Conservation Skills

<https://www.aabc-register.co.uk/apply/guide-to-conservation-skills>

https://www.aabc-register.co.uk/uploads/AABC_Guide_to_Conservation_Skills_2019.pdf

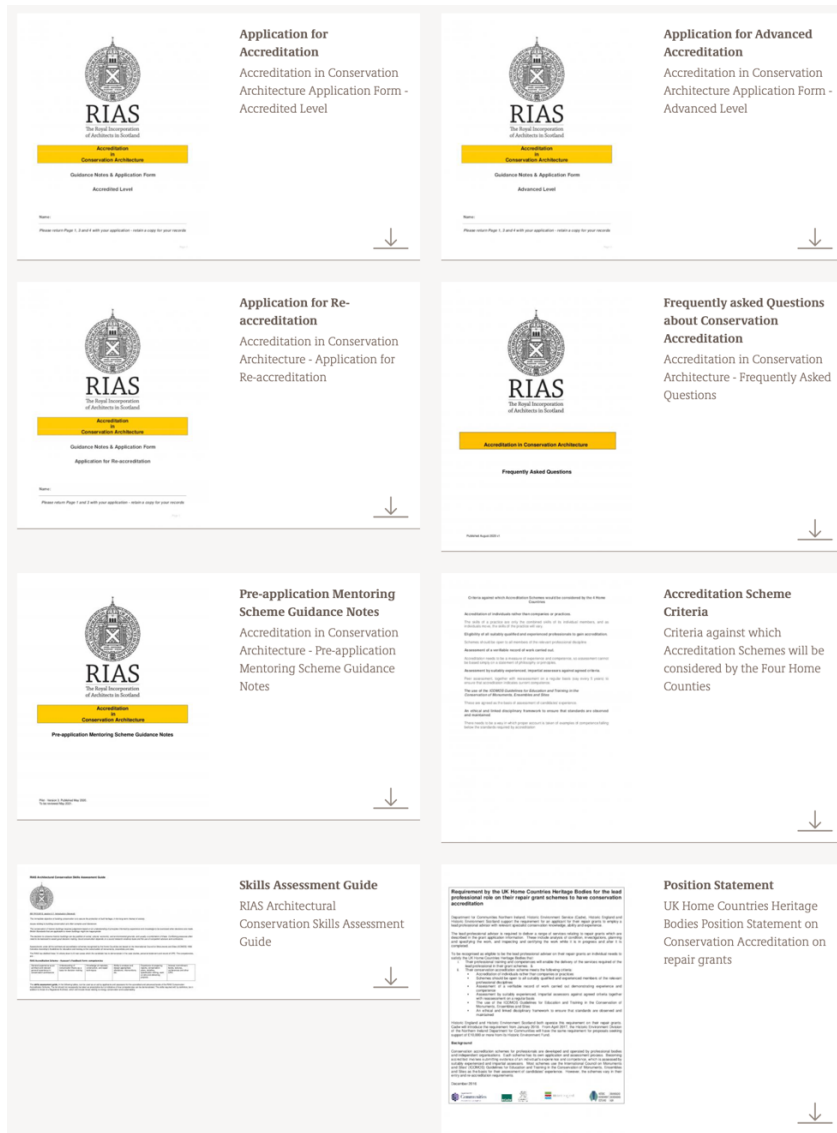
Royal Incorporation of Architects in Scotland (RIAS)

<https://www.rias.org.uk/for-the-public/conservation>

<https://aberdeenarchitects.org/wp-content/uploads/2020/08/FAQ-Conservation-Accreditation.pdf>

RIAS Related Downloads:

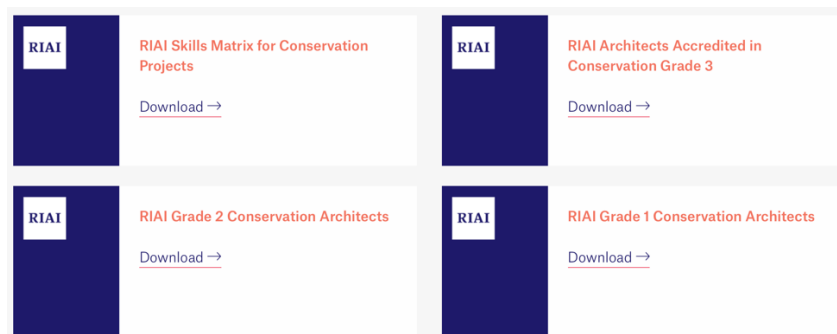
<https://www.rias.org.uk/for-architects/conservation-accreditation>



Royal Institute of the Architects of Ireland (RIAI)

<https://www.rai.ie/work-with-an-architect/conservation-skills>

RIAI Related Downloads:



Royal Institution of Chartered Surveyors (RICS)

<https://www.rics.org/surveyor-careers/career-development/accreditations/building-conservation-accreditation>

RICS Related downloads:

[Building Conservation Accreditation – Applicant Guide \(PDF 0.13MB\)](#)

Published date: 23 March 2017



[Building Conservation Accreditation Application Form RICS \(DOCX 0.23MB\)](#)



[Rules for Registration of Schemes Appendix B – RICS building conservation accreditation scheme \(BCAS\) - Version 6 \(PDF 0.06MB\)](#)

Published date: 02 February 2022



Chartered Institute of Architectural Technologists (CIAT)

<https://architecturaltechnology.com/membership/specialistregisters/conservation-register-new.html>

<https://architecturaltechnology.com/resource/candidate-guidance-notes---conservation-register-docx.html>

<https://architecturaltechnology.com/resource/candidate-application-form---conservation-register.html>

<https://architecturaltechnology.com/resource/formal-recognition-of-ciat-accredited-conservationists-pdf.html>

<https://architecturaltechnology.com/resource/hlf-recognition--pdf-version--pdf.html>

<https://architecturaltechnology.com/static/uploaded/0fa9dd8c-1d6f-4261-8348d02cd7cccc02.pdf>

<https://architecturaltechnology.com/about/whereitsat/conservation.html>

Conservation Accreditation Register of Engineers (CARE)

<https://www.ice.org.uk/download-centre/conservation-accreditation-register-of-engineers>

<https://www.ice.org.uk/media/fgqpxiq1/rgn-6-conservation-accreditation-register-for-engineers.pdf>

Chartered Institute of Building (CIOB) + CIOB Building Surveyor, in the Republic of Ireland

<https://www.ciob.org/learning/specialist-certification>

Society of Chartered Surveyors Ireland (SCSI) in partnership with RICS

<https://scsi.ie/building-conservation-accreditation/>

<https://www.rics.org/surveyor-careers/career-development/accreditations/building-conservation-accreditation>

Institute of Conservation (Icon)

<https://www.icon.org.uk/accreditation.html>

<https://www.icon.org.uk/accreditation/what-is-icon-accreditation.html>

<https://www.icon.org.uk/accreditation/pathway-membership.html>

<https://www.icon.org.uk/accreditation/apply-for-accreditation.html>

Institute of Historic Building Conservation (IHBC)

<https://ihbc.org.uk/join/catagories/index.html>

https://ihbc.org.uk/join/applicant_guidance/index.html

Chartered Institute for Archaeologists (CifA)

<https://www.archaeologists.net>

<https://www.archaeologists.net/codes/cifa>

<https://www.archaeologists.net/groups/buildings>

<https://www.archaeologists.net/civicrm/event/info?reset=1&id=386>

Annex D:
Conservation Accreditation Equivalence: Checklist updated to 11 July 2023
(Annexed to Edinburgh Group Final Terms of Reference)
 (Baseline information 27 July 2021)

Organisation	RICS	RIAS	Icon	CIAT	CARE	RIAI	RIBA	AABC	SCSI	IHBC	CIOB
Member of Edinburgh Group	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Acceptance of 2023 Edinburgh Group Final Terms of Reference	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Mentoring Provided	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Appeals Process in place	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Complaints Process in place	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Acceptance of Dec 2016 4 (UK) Home Countries Protocol	Y	Y	Y	Y	Y	N	Y	Y	N	Y	Y
Scheme Guided by Steering Group	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Scheme promoted widely	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Scheme only promoted to Members	Y	N	Y	Y	Y	Y	Y	N	Y	N	N
Individual Requirements	RICS	RIAS	Icon	CIAT	CARE	RIAI	RIBA	AABC	SCSI	IHBC	CIOB
Pre-qualified in a professional discipline	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y
Appropriately Registered to practice	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Informed by a rigorous approach (including a Skills Matrix)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Abiding by a Code of Professional Conduct	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Maintaining a CPD record of (preferably) Conservation orientated study	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Appropriately knowledgeable and experienced commensurate with application level	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Compiling and submitting a relevant CV with a Conservation focus	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Conversant with the ICOMOS E+T Guidelines	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Assessor Requirements	RICS	RIAS	Icon	CIAT	CARE	RIAI	RIBA	AABC	SCSI	IHBC	CIOB
Peer reviewed and verifiable through informed and moderated Assessors	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Informed by a rigorous approach (including a Skills Matrix)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Guided by and incorporating the ICOMOS E+T Guidelines	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Undertaking regular reassessments of applications	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y/N*	Y
Recognising the understandingconservation.org website support materials	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Offering a Complaints/Appeals process should that be required	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Guided by (UK) Data Protection Act 2018 requirements	Y	Y	Y	Y	Y	n/a	Y	Y	n/a	Y	Y
Promoted Principles of Scheme	RICS	RIAS	Icon	CIAT	CARE	RIAI	RIBA	AABC	SCSI	IHBC	CIOB
Applicants must be a suitably qualified and experienced member of their relevant Registering organisation and/or associated professional institute.	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Applicants must complete the necessary assessment as mandated by their respective Conservation Accreditation or Certification Scheme to demonstrate their level of competence.	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Assessments are measured against published Scheme criteria, all of which incorporate and adopt the 1993 ICOMOS Education and Training Guidelines for application and assessment purposes.	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Accredited Members must maintain appropriate membership of their Registration and/or host professional institute/body and abide by its Code of Conduct. Should they resign or retire, their related accredited status from that body will lapse.	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Applicants must provide evidence of relevant conservation orientated Continuing Professional Development undertaken in advance of their initial application process and, subsequently, as part of their reassessment applications.	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y

***IHBC Note:** CPD assessments take place annually across a cross-section of members (so Y) otherwise (a N) being about part of a regular re-accreditation, which IHBC don't do for Full Members, only Associate (and from 2022, Affiliate), though we do offer it as an elective review.

RICS Royal Institution of Chartered Surveyors
 RIAS The Royal Incorporation of Architects in Scotland
 Icon Institute of Conservation
 CIAT Chartered Institute of Architectural Technologists
 CARE Conservation Accreditation Register for Engineers
 RIAI Royal Institute of the Architects in Ireland

RIBA Royal Institute of British Architects
 AABC Architects Accredited in Building Conservation
 SCSI Society of Chartered Surveyors Ireland
 IHBC Institute of Historic Building Conservation
 CIOB Chartered Institute of Building