

COSBEDCL4014

Survey, assess and record the condition of assets in conservation



Overview

This unit concerns the surveying the condition of heritage asset(s). It covers the preparation phase, the completion of the survey and recording the results. You will need to recommend the appropriate way of carrying out the condition survey and agree it with interested parties. This involves evaluating existing information and identifying significant factors and selecting appropriate methods and techniques.

You will need to observe, measure and record aspects of the asset(s) in relation to actual and potential causes of failure and decay. This will enable you to assess the condition of the asset(s).

You will need to be able to summarise the findings of a property condition survey and make recommendations based upon it. You will need to answer clients' questions and provide clarification.

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Performance criteria

Agree asset condition

- You must be able to:*
- P1 identify and confirm the **asset** which require to be inspected
 - P2 identify the **objectives, purpose and approach** of the condition survey and collate available **information** and documents
 - P3 ensure risk assessment is carried out to determine **safe working practices**
 - P4 select valid, accurate and relevant **information** for the condition survey process
 - P5 evaluate relevant existing **information** and advice and identify **significant factors** which may influence the condition survey **approach**
 - P6 identify and confirm the levels and types of technical professional specialist support which will be needed and brief them with clear and accurate summaries of the relevant **information** available and the survey **objectives and purpose**
 - P7 select methods and techniques for the chosen **approach** and condition survey which meet the requirements of relevant codes of practice and legislation
 - P8 recommend a condition survey **process** which is justified by the evaluation, present it clearly and explain it to the **stakeholders**
 - P9 assess the validity of technical and professional and specialist support included in the recommendation
 - P10 agree and confirm the client's instructions, permissions and rights of access for the condition survey before work starts

Inspect assets for condition

- You must be able to:*
- P11 evaluate existing available **data** and permissions, confirm the **objectives, purpose and approach** of the inspection and obtain the equipment and resources and specialist **advice** that will be needed
 - P12 manage risk assessment and **safe working practices** in relation to **inspections**
 - P13 take accurate observations, records and measurements of **aspects of the asset** which are necessary for the inspection
 - P14 examine actual and potential **causes of failure deterioration and decay** and assess conditions
 - P15 identify gaps in information and obtain and evaluate additional **data** needed
 - P16 make further investigations when observations are inconsistent with existing **data** and findings, and accurately identify the cause of inconsistencies
 - P17 state clearly the authority for assumptions and projections used in the report and indicate any instances where and why accurate inspection

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- and measurement has not been possible
- P18 identify and obtain specialist **advice** where **complex issues** are found
- P19 **record** observations and measurements clearly, accurately and completely using agreed formats and conventions

Prepare and submit asset survey reports and records

You must be able to:

- P20 assemble and collate **information** on the **objectives, purpose and approach** of the condition survey
- P21 analyse all relevant evidence and **information** using appropriate **methods and techniques** and make a realistic assessment of condition
- P22 analyse and identify the implications and consequences of the decay
- P23 **prepare** and **submit** a condition survey report which is accurate, contains all relevant **information** and describes aspects of the asset
- P24 present findings and conclusions in formats that are suitable for circulation and discussion by non-specialists
- P25 answer the client's questions about the **condition survey** and give appropriate clarification and justification
- P26 **archive** records which are clear, accurate and complete and conform to accepted professional and statutory requirements

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Knowledge and understanding

You need to know and understand:

Agree asset condition

- K1 what to identify as the **asset** which requires to be inspected (understanding)
- K2 what to identify as the **objectives, purpose and approach** of the condition survey (understanding)
- K3 how to ensure that risk assessment is carried out to determine **safe working practices** (application)
- K4 how to collate available **information** and documents (application)
- K5 how and why to select valid, accurate and relevant **information** for the condition and/or survey process (evaluation)
- K6 how and why to evaluate relevant **information** and advice (evaluation)
- K7 what to identify as **significant factors** which may influence the condition and/or survey **approach** (understanding)
- K8 how to confirm the levels and types of technical and professional and specialist support which will be needed (application)
- K9 what to identify as the levels and types of technical and professional and specialist support which will be needed (understanding)
- K10 how to brief technical and professional and specialist support with clear and accurate summaries of the **information** available and the survey **objectives and purpose** (application)
- K11 how and why to select methods and techniques for the chosen **approach** and condition and/or survey (evaluation)
- K12 how and why to recommend a condition survey **process** (synthesis)
- K13 how to present and explain the condition survey **process** to the **stakeholder** (application)
- K14 how and why to assess the validity of technical and professional and specialist support included in the recommendations (analysis)
- K15 how to confirm the client's instructions, permissions and rights of access for the condition and/or survey before work starts (application)
- K16 how and why to agree the instructions and agreements for the condition and/or survey before work starts (evaluation)

Inspect assets for condition

You need to know and understand:

- K17 how and why to evaluate existing available **data** and permissions (evaluation)
- K18 how to confirm that the **objectives, purpose and approach** of the inspection (application)
- K19 how to obtain the equipment and resources and specialist **advice** that will be needed (application)
- K20 how to manage risk assessment and **safe working practices** in relation to inspections (evaluation)

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- K21 how to take accurate observations and measurements of **aspects of the asset** which are necessary for the inspection (application)
- K22 how and why to examine actual and potential **causes of failure and deterioration** and assess condition (analysis)
- K23 how and why to evaluate additional **data** needed (evaluation)
- K24 how to obtain additional **data** needed (application)
- K25 how to state clearly instances where and why accurate inspection and measurement has not been possible (application)
- K26 what to as identify gaps in information (understanding)
- K27 how and why to make further investigations when observations are inconsistent with existing **data** and expected findings (analysis)
- K28 what to identify as specialist **advice** (understand)
- K29 what to identify as the cause of inconsistencies with existing **data** (understanding)
- K30 how to obtain specialist advice where **complex issues** are found (application)
- K31 how to **record** observations and measurements clearly, accurately and completely using agreed formats and conventions (application)

Prepare and submit asset survey reports and records

You need to know and understand:

- K32 how to assemble and collate **information** on the **objectives, purpose and approach** of the from the condition survey (application)
- K33 how and why to analyse all relevant evidence and **information** using appropriate **methods and techniques** (analysis)
- K34 how and why to make a realistic assessment of condition (analysis)
- K35 how and why to analyse the implications and consequences of the decay (analysis)
- K36 what to identify as the implications and consequences of the decay (understanding)
- K37 how to **prepare** and **submit** a **condition survey report** (application)
- K38 how to present findings and conclusions in formats that are suitable for circulation and discussion by non-specialists (application)
- K39 how to answer the clients question about the condition survey and give appropriate clarification (application)
- K40 how to **archive** records which are clear, accurate and complete and conform to accepted professional and statutory requirements (application)

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Scope/Range

Agree asset condition

- 1 Assets:**
 - 1.1 individual buildings
 - 1.2 ensemble (setting & surroundings)
 - 1.3 garden, designed or other cultural landscape
 - 1.4 Conservation Area
 - 1.5 list of scheduled monuments and listed buildings
 - 1.6 refurbishings and fittings
 - 1.7 system & service installation
 - 1.8 archaeology
 - 1.9 evidential, historical, aesthetic, communal locations (including intangible assets)
 - 1.10 access and highways
- 2 Objectives, purpose and approach**
 - 2.1 conservation
 - 2.2 restoration
 - 2.3 preservation
 - 2.4 refurbishment
 - 2.5 maintenance work
 - 2.6 consolidation
 - 2.7 reparation
 - 2.8 repair
 - 2.9 retrofit/eco-upgrade
 - 2.10 scheduled preventative maintenance
 - 2.11 unscheduled corrective maintenance
 - 2.12 emergency maintenance
 - 2.13 disaster planning
- 3 Information:**
 - 3.1 land registry
 - 3.2 local search
 - 3.3 statutory identification
 - 3.4 local authorities
 - 3.5 existing surveys
 - 3.6 legal documents
 - 3.7 historical/archival records
 - 3.8 graphical information
 - 3.9 consultations
 - 3.10 field research
 - 3.11 forensic research
 - 3.12 maps/drawings

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- 3.13 meteorological data
- 3.14 geological data
- 3.15 photographic baseline study: review existing or create new material
- 3.16 published sources
- 3.17 technical guidelines
- 3.18 archaeological research
- 3.19 specialist reports
- 4 Safe working practices:**
 - 4.1 personal safety
 - 4.2 equipment and clothing
 - 4.3 safe use of access equipment
 - 4.4 health and safety practice and regulations
 - 4.5 industry Codes of Practice
 - 4.6 regulations applying to the survey site
- 5 Stakeholders:**
 - 5.1 internal to the organisation
 - 5.2 external to the organisation
- 6 Significant factors:**
 - 6.1 degree of urgency
 - 6.2 gaps in information
 - 6.3 susceptibility to damage
 - 6.4 health and safety requirements
 - 6.5 security requirements
 - 6.6 access
 - 6.7 current legislation and regulations
 - 6.8 survey costs & methods
 - 6.9 comprehensiveness/completeness of survey
 - 6.10 charters and conventions
- 7 Process:**
 - 7.1 inspection/field survey
 - 7.2 documentary/archival research

Inspect assets for condition

- 8 Data:**
 - 8.1 land registry
 - 8.2 local search
 - 8.3 statutory identification
 - 8.4 local authorities
 - 8.5 existing surveys
 - 8.6 legal documents

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- 8.7 historical/archival records
- 8.8 graphical information
- 8.9 consultations
- 8.10 field research
- 8.11 forensic research
- 8.12 maps/drawings
- 8.13 meteorological data
- 8.14 geological data
- 8.15 published sources
- 8.16 photographic baseline study: review existing or create new material
- 8.17 technical guidelines
- 8.18 archaeological research
- 8.19 specialist reports
- 9 Objectives, purpose and approach**
 - 9.1 conservation
 - 9.2 restoration
 - 9.3 preservation
 - 9.4 refurbishment
 - 9.5 maintenance work
 - 9.6 consolidation
 - 9.7 reparation
 - 9.8 repair
 - 9.9 retrofit/eco-upgrade
 - 9.10 scheduled preventative maintenance
 - 9.11 unscheduled corrective maintenance
 - 9.12 emergency maintenance
 - 9.13 disaster planning
- 10 Advice:**
 - 10.1 line manager
 - 10.2 specialist conservators
- 11 Safe working practices:**
 - 11.1 personal safety
 - 11.2 equipment and clothing
 - 11.3 safe use of access equipment
 - 11.4 health and safety practice and regulations
 - 11.5 industry Codes of Practice
 - 11.6 regulations applying to the survey site
- 12 Aspects of the asset:**
 - 12.1 age
 - 12.2 type
 - 12.3 location

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- 12.4 natural built environment
- 12.5 features and characteristics
- 12.6 character
- 12.7 evidential, historic, aesthetic, communal location
- 12.8 use factors
- 12.9 structure - construction methods & techniques & technologies
- 12.10 fabric - building materials & their properties & interactions
- 12.11 sources of materials
- 12.12 service installation
- 12.13 embodied energy & use
- 12.14 effects of previous repairs & maintenance
- 12.15 condition rating
- 12.16 emotional, cultural & use significance
- 13 Causes of failures, deterioration & decay:**
 - 13.1 building defects and failures
 - 13.2 rising damp, penetrating damp and condensation problems
 - 13.3 dry rot, wet rot and timber decay
 - 13.4 infestation
 - 13.5 physical, chemical and environmental processes
 - 13.6 sick building syndrome including indoor air quality
 - 13.7 lack of use, total or partial, or use insufficient to justify investment in repair
 - 13.8 structural (including ground conditions)
 - 13.9 interaction of materials
 - 13.10 poor workmanship
 - 13.11 inappropriate materials
 - 13.12 wear and tear
 - 13.13 fire
 - 13.14 theft
 - 13.15 vandalism
 - 13.16 flora & fauna
 - 13.17 weathering
 - 13.18 flooding
 - 13.19 thermal expansion
- 14 Complex issues:**
 - 14.1 technical
 - 14.2 historic & heritage - status & value
- 15 Record:**
 - 15.1 written
 - 15.2 graphical
 - 15.3 photographic
 - 15.4 electronic

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- 15.5 industry standard
- 15.6 industry conventions

Prepare and submit asset survey reports and records

- 16 Information:**
 - 16.1 inspection, observations and measurements
 - 16.2 investigation and research findings
 - 16.3 industry standard and legislation
 - 16.4 published technical data
- 17 Objectives, purpose and approach on the condition survey**
 - 17.1 conservation
 - 17.2 restoration
 - 17.3 preservation
 - 17.4 refurbishment
 - 17.5 maintenance work
 - 17.6 consolidation
 - 17.7 reparation
 - 17.8 repair
 - 17.9 retrofit/eco-upgrade
 - 17.10 scheduled preventative maintenance
 - 17.11 unscheduled corrective maintenance
 - 17.12 emergency maintenance
 - 17.13 disaster planning
- 18 Condition survey report::**
 - 18.1 meets relevant codes of practice and standards
 - 18.2 recommended courses of action
 - 18.3 any qualifying factors
 - 18.4 specialist reports
 - 18.5 need for further investigation
 - 18.6 Standard Report Forms
 - 18.7 Non-Standard
- 19 Methods and techniques:**
 - 19.1 comparison
 - 19.2 quantitative
 - 19.3 qualitative
 - 19.4 risk assessment of the asset
 - 19.5 building pathology
- 20 Prepare:**
 - 20.1 written
 - 20.2 graphical
 - 20.3 photographic

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- 20.4 electronic
- 21 Submit:**
 - 21.1 to client
 - 21.2 organisational records
 - 21.3 public records

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Relevant occupations Town planners; chartered surveyors (not quantity surveyors); building inspectors; construction project manager and related professions

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