

COSTPCBCB56.1-B5.2

Analyse research and report on historic and heritage assets in conservation



Overview

This unit is about undertaking research to establish the cultural significance (and any designations) of assets. You will need to collect, collate, analyse and evaluate investigation data. You will need to report on the relative historic and heritage value, interest, character and significance in order to understand their status, condition and behaviour over time. You will also need to record statements of interest, character and significance and lodge in appropriate archives.

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Performance criteria

Research information on historic and heritage assets

You must be able to:

- P1 identify the priorities and **factors** for investigation and research that may be significant to establishing the cultural significance (and any designations) of **assets**
- P2 identify **investigation sources** and collect and collate relevant **data**
- P3 analyse and evaluate the investigation **data** which has been collected about all of the significant **factors** affecting the **assets**
- P4 identify **complex issues** and obtain specialist advice by providing an accurate summary of the problems
- P5 incorporate this specialist advice, and resolve conflicts where necessary
- P6 identify and accurately record **aspects of the assets** in relation to the purpose of the research

Analyse and report on the significance of historic and heritage assets

You must be able to:

- P7 collate, review and interpret the results of investigations and research in order to gain an overview of the potential views on the **cultural and heritage value** of **assets**
- P8 analyse **information sources relating to assets** and identify their relative **cultural and heritage value**, their interest, character and **significance** in order to understand their status, condition and behaviour over time
- P9 consult with experts on specific issues which are relevant to the assessment and which are beyond personal experience by providing them with an accurate summary of the problems
- P10 record statements of cultural interest, character and **significance**
- P11 **archive** records which are clear, accurate and complete and conform to accepted professional and statutory requirements

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Knowledge and understanding

Research information on historic and heritage assets

You need to know and understand:

- K1 what to identify as the priorities and **factors** for investigation and research that may be significant to establishing the cultural significance (and any designations) of **assets** (understanding)
- K2 what to identify as **investigation sources** and the collection and collation of relevant **data**
- K3 how and why to analyse the investigation **data** which has been collected about all of the significant **factors** affecting the **assets** (analysis)
- K4 how and why to evaluate the investigation **data** which has been collected about all of the significant **factors** affecting the **assets** (evaluation)
- K5 what to identify as **complex issues** (understanding)
- K6 how to obtain specialist advice (application)
- K7 how to incorporate specialist advice, and resolve conflicts where necessary (application)
- K8 what you identify as **aspects of the assets** in relation to the purpose of the research (understanding)
- K9 how to accurately record **aspects of the assets** in relation to the purpose of the research (application)

Analyse and report on the significance of historic and heritage assets

You need to know and understand:

- K10 how to collate the results of investigations and research in order to gain an overview of the potential views on the **cultural and heritage value** of **assets** (application)
- K11 how to review and interpret the results of investigations and research in order to gain an overview of the potential views on the **cultural and heritage value** of **assets** (analysis)
- K12 how and why to analyse **information sources relating to assets** (analysis)
- K13 what to identify as the relative historic and heritage value, interest, character and **significance** of **assets** in order to understand their status, condition and behaviour over time
- K14 how to consult with experts on specific issues which are relevant to the assessment and which are beyond personal experience by providing them with an accurate summary of the problems (application)
- K15 how to record statements of interest, character and **significance** and lodge in an appropriate archive (application)
- K16 how to **archive** records which are clear, accurate and conform to accepted professional and statutory requirements (application)

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Scope/Range

Research information on historic and heritage assets

- 1 Factors:**
 - 1.1 historical
 - 1.2 conservation
 - 1.3 social
 - 1.4 cultural
 - 1.5 political
 - 1.6 aesthetic
 - 1.7 visual and spatial
 - 1.8 repair & maintenance
 - 1.9 ecological and environmental
 - 1.10 construction
 - 1.11 architectural
 - 1.12 archaeological
 - 1.13 technological
- 2 Assets:**
 - 2.1 individual buildings
 - 2.2 ensemble (setting & surroundings)
 - 2.3 garden, designed or other cultural landscape
 - 2.4 Conservation Area
 - 2.5 list of scheduled monuments and listed buildings
 - 2.6 interiors, refurbishments and fittings
 - 2.7 system & service installation
 - 2.8 archaeology
 - 2.9 evidential, historical, aesthetic, communal locations (including intangible assets)
 - 2.10 access ways
- 3 Investigation sources:**
 - 3.1 government and statutory authorities
 - 3.2 local, regional, national regulations & international charters
 - 3.3 the client/owners and their consultants
 - 3.4 official lists and schedules
 - 3.5 Conservation and Management Plan
 - 3.6 public utilities
 - 3.7 consultative bodies
 - 3.8 specialist groups
 - 3.9 specialist libraries and archives
 - 3.10 material sources
 - 3.11 specialists including experienced craftspeople
 - 3.12 feedback & evidence from previous work

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- 4 Data:**
 - 4.1 visual inspection
 - 4.2 archive records
 - 4.3 legal documents
 - 4.4 survey reports
 - 4.5 photographs
 - 4.6 maps
 - 4.7 charts
 - 4.8 drawings
 - 4.9 statistics
- 5 Complex issues:**
 - 5.1 technical/conservation
 - 5.2 emotional, cultural and use significance
 - 5.3 environmental
- 6 Aspects of the asset:**
 - 6.1 age
 - 6.2 type
 - 6.3 location
 - 6.4 natural and built environment
 - 6.5 features and characteristics
 - 6.6 evidential, historic, aesthetic, communal location
 - 6.7 use factors
 - 6.8 structure - methods, techniques & technologies
 - 6.9 building materials (their properties & interactions)
 - 6.10 sources of materials
 - 6.11 embodied energy
 - 6.12 previous repairs & maintenance

Analyse and report on the significance of historic and heritage assets

- 7 Cultural and heritage value:**
 - 7.1 historical
 - 7.2 conservation
 - 7.3 social
 - 7.4 political
 - 7.5 aesthetic
 - 7.6 visual and spatial
 - 7.7 repair & maintenance
 - 7.8 construction
 - 7.9 architectural
 - 7.10 archaeological
 - 7.11 technological

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- 8** **Assets:**
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 - 8.7 system & service installation
 - 8.8 archaeology
 - 8.9 evidential, historical, aesthetic, communal locations (including intangible assets)
 - 8.10 access ways
- 9** **Information sources relating to assets:**
 - 9.1 inspection observations and measurements
 - 9.2 research investigations and findings
 - 9.3 industry standards and legislation
 - 9.4 published technical data & guidance
- 10** **Significance:**
 - 10.1 how historic and heritage values relate to fabric
 - 10.2 rarity
 - 10.3 quality
 - 10.4 evidential features
 - 10.5 layout
 - 10.6 setting
 - 10.7 instrumental values: context and community values
- 11** **Archive:**
 - 11.1 to client
 - 11.2 organisational records
 - 11.3 public records

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