



Skills assessment of local authority conservation staff

THE INSTITUTE OF HISTORIC BUILDING CONSERVATION

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THE INSTITUTE OF HISTORIC BUILDING CONSERVATION

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1. Project Summary and conclusions

1.1 Introduction and context

This report represents an initial mapping of the skills available to England's local authority conservation services in delivering their statutory and non-statutory duties. The report, commissioned by English Heritage, is based on data collected and collated in 2013 by The Institute of Historic Building Conservation (IHBC). It uses two sets of data sources from two distinct research programmes: a desk top data gathering based on existing research into local authorities already carried out by the IHBC and other public sources; and a new open public web-based survey specifically developed in partnership with English Heritage to help evaluate current skills, skills development priorities and future support needs. This summary collates the conclusion to each strand of the project.

1.1.a Survey Objects

The report, and the research on which it has been based, have been structured to help guide in:

- understanding the skills essential to a service that is able to deliver in line with statutory duties and non-statutory obligations
- identifying where gaps in skills may exist and so establish how best to fill gaps
- appreciating preferred methods of filling gaps by developing skill
- establishing baseline data to allow repeat assessments in future years to identify emerging trends and threat.

The immediate objective of the report is to feed into the state of the historic environment report, Heritage Counts 2013, the theme of which is heritage skills. In addition, the information will also provide a basis for future historic environment strategies to be underpinned by the informed understanding of the current and future state of skills in Local Planning Authorities.

1.1.b Research Qualifications: Survey Restrictions

At the outset it is important to recognise that skills priorities for local authorities identified here do not represent either the conservation sector as a whole or any particular service or group of services. The local authorities identified in this work are those, in the main, that strive to maintain a conservation service at a reasonable level and in general employ skilled staff in conservation specific roles. It has not been possible to distinguish the skills available to a local authority that does not invest in a competent and identifiable conservation service but may still in some other way have an effective skills balance available to it. One key reason is that there is no agreed standard for what is called here an 'effective' or credible conservation service. As such this report looks only at national, England-wide trends within local authorities, and does not take account of service quality, infrastructure or private sector skills availability.

1.1.c Research Qualifications: Survey Terminology

Non-technical language was used in the web based public survey to encourage access and inclusion by contributors, and the same language is used in the report to avoid introducing errors in the technical interpretation of non-technical data.

Consequently reference is made here to skills that are 'crucial' at a 'skilled' level if a competent service to function effectively. The survey and report also refer to 'valuable' skills that are may be accessible to a 'capable' level for an effective service.

1.2 Project Background

The data upon which this report is based was gathered using two research methodologies:

1. A desk-based mapping based on skill-related data gathered for the IHBC's *Quantifying Local Authority Conservation Staffing* (Project number 6570), which assessed 580 conservation posts and their post-holders, supported by extensive complementary research, and

2. An open public web-based survey targeted at conservation specialists in local authorities, other local authority officers and external service users, to assess the conservation skills currently available to local authorities and how strong these are considered by both the conservation specialists and those who they work with or advise.

1.3. Project Conclusions

1.3.1 Summary statistical findings

1.3.1a Desk based research

There is a substantial body of skills available to conservation services in England's local authorities. 580 conservation posts and their post-holders were identified.

Qualifications

The qualifications of those working in 369 conservation posts were listed and of these;

- 42% or 314, qualifications were graduate level
- 58%, or 438, qualifications were post-graduate level.
- 56.6%, or 209, conservation specialists have specific conservation qualifications at either graduate or post-graduate level.
- Each local authority conservation specialist has an average of 2.03 graduate or post-graduate qualifications.
- Post-graduate conservation qualifications account for 26% of qualifications held (192 qualifications).

Professional memberships

The professional affiliations of 402 of those working in conservation were identified and between them they had 550 professional memberships.

- Each person has an average of 1.37 professional memberships with very many being members of more than one professional body.
- 81% are members of the Institute of Historic Building Conservation (IHBC) (325 of 402 post-holders)

- 37% are members of the Royal Town Planning Institute (RTPI) (149 of 402 post-holders)
- 19% are members of a number of other professional bodies including Architects Registration Board (ARB), Royal Institute of British Architects (RIBA), Landscape Institute (LI), Institute for Archaeologists (IfA) & Royal Institution of Chartered Surveyors (RICS) (76 of 402 post-holders)

1.3.1b Web based open survey;

The web survey, like the desktop survey, confirms that there is a substantial body of skills already identifiable within England's Local Planning Authorities.

It also concludes that conservation specialists are generally at a low level of internal seniority despite their experience and qualifications. In spite of this status their contact with Councillors, and by extension political influence, is good.

Based on web-survey respondees inside local authorities;

- 49% are below Senior Officer level¹
- 17% are at Principal Officer or above²
- The most senior conservation professional in 63%, or 56 authorities, are at Senior Officer level or below
- 73% of conservation services in authorities that responded have regular contact with their Councillors
- 27% of conservation services in authorities that responded have little or no contact with their Councillors

1.3.2 **Crucial skills priorities for a competent conservation service in England**

1.3.2.a Introduction and summary

^{1 & 2} The full list of job titles of those conservation specialists who responded to the survey is shown at Appendix 3 but Tables 12 and 13 (page 43) groups these posts into levels of seniority. The categories of post are shown beginning with the most senior in both tables and accord with those suggested as typical to local authorities ('Local Government today' JA Chandler (Manchester University Press, 2009)

The web survey allowed for a more effective correlation between skills needs and priorities by asking conservation services, their local authority colleagues and external service users for their opinion. The details are summarised further below, but for convenience Table 1 collates the data into a matrix that highlights the priorities for future support.

It also adopts the accessible terminology used in the survey, referring to skills that are 'crucial' at a 'skilled' level if a competent service is to function effectively and to 'valuable' skills that are accessible to a 'capable' level for an effective service. International standards identify that "Conservation works should only be entrusted to persons competent in these specialist activities"³. Without significant further work a measurable standard for a competent⁴ service can not be defined but it is clear from this work that, in order to be competent as a service, the staff within it should have, in line with the broad definition of competence, the necessary ability, knowledge, or skill carry out their duties successfully. In order to achieve this and to carry out their duties to an acceptable level this report assumes that a competent service is likely to have been achieved when 'crucial' skills are achieved at a 'skilled' level and 'valuable' skills at least at 'capable' level, demonstrating the highest levels of skills to carry out the tasks. This does not mean that these skill levels represent a baseline acceptable level that should be achieved to certify a competent service, which may indeed be a lower skill level, but that services operating at this higher level are competent in general terms.

Further details are provided in the sections below.

³ ICOMOS Guidelines on Education and Training in the Conservation of Monuments, Ensembles and Sites (1993) <http://www.icomos.org/charters/education-e.pdf> paragraph 5

⁴ The Oxford dictionary online defines competent as 'having the necessary ability, knowledge, or skill to do something successfully'

TABLE 1

Skills needs and priorities for effective conservation services

Importance and current skill accessibility levels ↓						Support Priority →	Priority 1	
							Priority 2	
							Priority 3	
							Maintain	
Crucial Skilled Good accessibility	Conservation Philosophy	Standards of conservation practice	Conservation Legislation	Conservation Policy	Heritage at Risk	Use of materials & repairs to historic buildings		
	Condition assessment							
Crucial, Skilled Poor accessibility								
Valuable, Capable Good accessibility	History	Research & recording	Data management	Project management	Design & Presentation	Engagement, advocacy & outreach		
Valuable Capable Poor accessibility	Finance & economics	Project development	'Green' skills					

1.3.2.b Perceptions of skills needs

To identify and understand priorities for different areas of skills development and support, the survey offered a listing of key skills, agreed between the IHBC and English Heritage, and asked respondents to identify priorities in terms of importance, levels required, and availability. All skills identified were agreed as important to an effective service.

Respondees to the survey almost universally agreed that in order to create and maintain a competent conservation service, it is 'crucial' that certain skills should be accessible to services at a level described in this report as 'skilled', whilst other skills are 'valuable' and could be accessible to a level described here as 'capable'.

Those skills perceived as crucial overall were;

- Conservation Philosophy
- Standards of conservation practice
- Conservation Legislation

- Conservation Policy
- Heritage at Risk
- Condition assessment
- Use of materials & repairs to historic buildings

The remaining skills were felt to be valuable;

- History
- Research & recording
- Data management
- Finance & economics
- Project development
- Project management
- Design & Presentation
- Engagement, advocacy & outreach
- 'Green' skills

1.3.2 c Current skill levels

Overall the highest number of respondents felt that conservation services already have access to 'skilled' levels, possessing knowledge or skills to perform effectively and efficiently, in the areas of:

- Conservation Philosophy
- Standards of conservation practice
- Conservation Legislation
- Conservation Policy
- Heritage at Risk
- Use of materials & repairs to historic buildings

In certain areas conservation services have access to a 'capable' level, having adequate knowledge or skills:

- History
- Research & recording
- Data management
- Project management

- Design & Presentation
- Engagement, advocacy & outreach

In some skills areas conservation services are felt by the majority to achieve a lower levels of skills, and to be 'aware', having basic knowledge or skills:

- Finance & economics
- Project development
- Condition assessment
- 'Green' skills

In no areas was there a consensus that conservation services are currently 'unaware' with little or no knowledge or skills.

1.3.3 Summary conclusions: Priorities for future conservation skills support

By mapping the majority responses, from both conservation specialists and service users on the levels of current skills, against how valuable and necessary each skill is considered, we can prioritise skills development for local authority conservation staff.

This mapping produces a series of phased priorities for skills development to ensure a rounded level of skills across the board but also to highlight development of those skills considered to be most critical, or priority 1, for support.

Priority 1

A Crucial skill area, where the level of current skill is only at 'aware' level. Development of this skill should be carried out in all immediate training opportunities

- Condition assessment

Priority 2

Valuable skills that have limited availability should have training opportunities focussed on them over the next two years

- Finance & economics
- Project development

- 'Green' skills

Priority 3

These are Valuable skills that are currently at 'capable' level and could be enhanced to 'skilled' level. Training opportunities in the longer term could consider these skills

- History
- Research & recording
- Data management
- Project management
- Design & Presentation
- Engagement, advocacy & outreach

Maintain skills

Crucial skills, which are currently at 'skilled' level, should be maintained and developed to ensure they are kept up to date and not lost or diminished from the conservation workforce

- Conservation Philosophy
- Standards of conservation practice
- Conservation Legislation
- Conservation Policy
- Heritage at Risk
- Use of materials & repairs to historic buildings

This does not mean that other skills not looked at in this work might also need to be developed, enhanced and maintained but does give a robust starting point for key skills.

2. Desk top research

2.1 Analysis of existing Local Planning Authority conservation skills and qualifications data

A desk-based skills mapping exercise was undertaken using a variety of publicly available sources including Local Authority websites, appeal decisions, publications and the IHBC Yearbook. This research was considered essential as it would establish a critical information base of actual skills against which perceptions could be interrogated. If no skills could be identified in the staff then clearly no skills could be ascribed to the services, while if skills could be identified, then problems over accessibility could be explored with more confidence.

To initiate the research a substantial body of information was gathered from the data collected during the formulation of the English Heritage funded project *Quantifying Local Authority Conservation Staffing* (Project number 6570).

A database was developed to create a separate entry for each known conservation specialist in English local authorities. This was based on the senior conservation contact identified as part of *Quantifying Local Authority Conservation Staffing* and any other staff members whose names were made known as part of that survey. Added to this list were additional conservation staff identified through analysis of other public sources. Senior contacts who were not conservation specialists, mainly based in those authorities without in-house conservation advice, were excluded to ensure that only what might broadly be called a conservation specialist were counted. As a result 580 conservation posts and their post-holders were identified.

It should be noted this does not mean that there are 580 full time conservation posts in England but that many of these are part time staff contributing towards the total of 547.5 full time equivalents advising local authorities reported in the most recent survey for *Quantifying Local Authority Conservation Staffing*. It should also not be assumed that 580 is the total number of conservation posts throughout England, and there are a number of additional posts which are known to exist but the names of post-holders are not known.

2.2 Skills assessment in conservation services: A context

Over recent years there have been a number of initiatives attempting to define the range of skills that a competent conservation specialist should possess in order to be effective. Amongst the forerunners of these were the Institute of Historic Building Conservation (IHBC) Areas of Competence, begun in 1997 and developed and evolved since. A list of key skills for a historic environment service was developed in 2009 as part of the English Heritage, IHBC and ALGAO report on local authority staff resources⁵. Although this is a general overview of both conservation and archaeology services, all but a few of the activities or skills are relevant to conservation services alone. This work in turn was developed from a document drawn up by the IHBC in 2008⁶, which refers the activities back to the IHBC Areas of Competence. These activities have been used to draw out a list of key skills, which one might possibly expect a conservation service to have. Appendix 2 shows the general activities alongside the key skills needed to carry them out. These skills have been used as the baseline for this work.

The IHBC requires Full members to meet and maintain the IHBC's Areas of Competence. These Competences are the key membership criteria of the Institute and to the ongoing development of skills through the Institute's programme for Continuing Professional Development. The Areas of Competence and the corresponding competences represent the standard for the assessment of skills, knowledge, experience and understanding that the IHBC requires of historic environment conservation professionals.

The IHBC's four Areas of Competence comprise the overarching 'Professional' Area of Competence, and the three Practical Areas: 'Evaluation', 'Management' and 'Intervention'. Within these broad areas sit more specific Competences.

The Professional Area of Competence informs and shapes conservation advice whilst the Practical Areas of Competence correspond to how conservation is achieved, by evaluating, managing and, as appropriate, changing places. The Areas of

⁵ How to care for places and people: Towards a common standard in Historic Environment Conservation Services & Skills. [http://www.ihbc.org.uk/recent_papers/docs/IHBC_Consultation_Draft_-_Historic_Environment_Conservation_Skills_and_Services,_February_2008_\(MASTER\)_v.2009%5B1%5D.pdf](http://www.ihbc.org.uk/recent_papers/docs/IHBC_Consultation_Draft_-_Historic_Environment_Conservation_Skills_and_Services,_February_2008_(MASTER)_v.2009%5B1%5D.pdf)

⁶ How to care for places and people: Towards a common standard in Historic Environment Conservation Services & Skills. [http://www.ihbc.org.uk/recent_papers/docs/IHBC_Consultation_Draft_-_Historic_Environment_Conservation_Skills_and_Services,_February_2008_\(MASTER\)_v.2009%5B1%5D.pdf](http://www.ihbc.org.uk/recent_papers/docs/IHBC_Consultation_Draft_-_Historic_Environment_Conservation_Skills_and_Services,_February_2008_(MASTER)_v.2009%5B1%5D.pdf)

Competence are equally relevant to non-members, conservation professionals and other built environment professionals so can be applied broadly to the role of conservation specialist.

The Competences are shown in Table 2 below, which also shows how the skills identified as part of this project fit with each of the competences. Some skill areas may overlap competences and be shown more than once.

TABLE 2

The IHBC Areas of competence and conservation specialist skills

IHBC Area of competence	IHBC Competences	Skills considered in skills assessment
Professional		
	<i>Philosophy</i>	Conservation Philosophy
	<i>Practice</i>	Standards of conservation practice Engagement, advocacy & outreach Project development Project management
Practical; Evaluation		
	<i>History</i>	History
	<i>Research, recording & analysis</i>	Research & recording Data management

Practical; Management		
	<i>Legislation & Policy</i>	Conservation Legislation Conservation Policy Heritage at Risk
	<i>Finance & economics</i>	Finance & economics Project development Project management

Practical; Intervention		
	<i>Design & presentation</i>	Design & Presentation Engagement, advocacy and outreach
	<i>Technology</i>	Use of materials & repairs to historic buildings Condition assessment 'Green' skills

2.3 Academic and formal qualifications

Of the 580 conservation post-holders identified the qualifications of those working in 369 conservation posts were listed. The qualifications of a further 211 conservation post-holders were not known. A total of 752 qualifications were identified with 42%, or 314 individual qualifications, being graduate qualifications and 58%, or 438, post-graduate qualifications.

Not all qualifications will necessarily be recorded and it is possible this is not an absolute record of all qualifications. Some did not give details of their qualifications when asked and others do not use all, or sometimes any, of their qualifications as post-nominals in published sources. Some conservation specialists have taken up conservation later in life following a career change from an unrelated discipline, as

opposed to those from related disciplines such as planning or architecture. These people may have qualifications in their previous field but will not always quote them as they do not feel they are relevant to their conservation role. Not included in their qualifications listed for this survey are officers who hold qualifications in marketing, education and fashion.

Each officer has an average of 2.03 graduate or post-graduate qualifications. This high level of general qualification amongst conservation officer also includes a high level of specialist conservation qualification. Post-graduate conservation qualifications account for 26% of qualifications held (192 qualifications). Moreover of the 369 officers whose qualifications are known, 209 or 56.6%, have conservation qualifications at either graduate or post-graduate level (with those who hold both only being counted once).

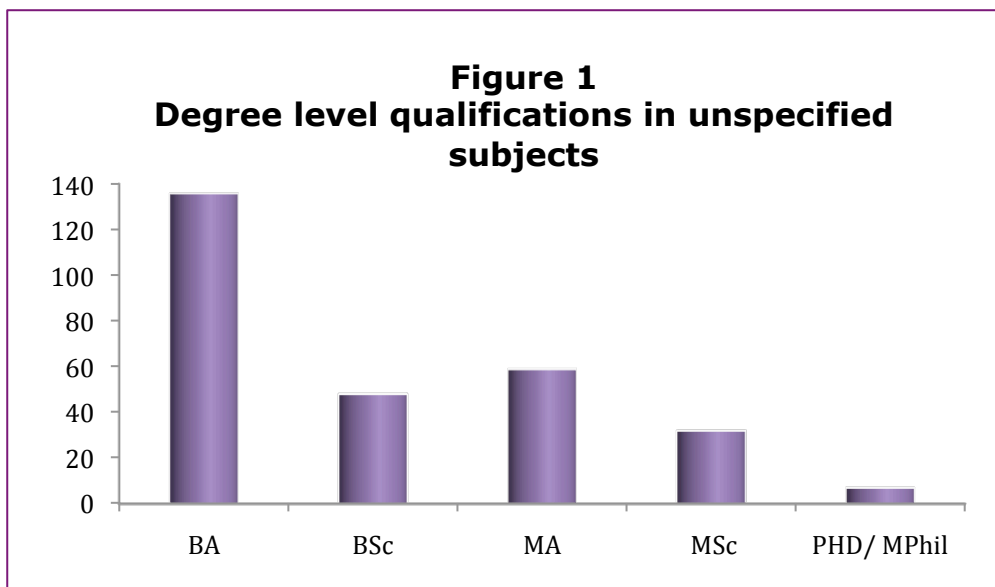
TABLE 3

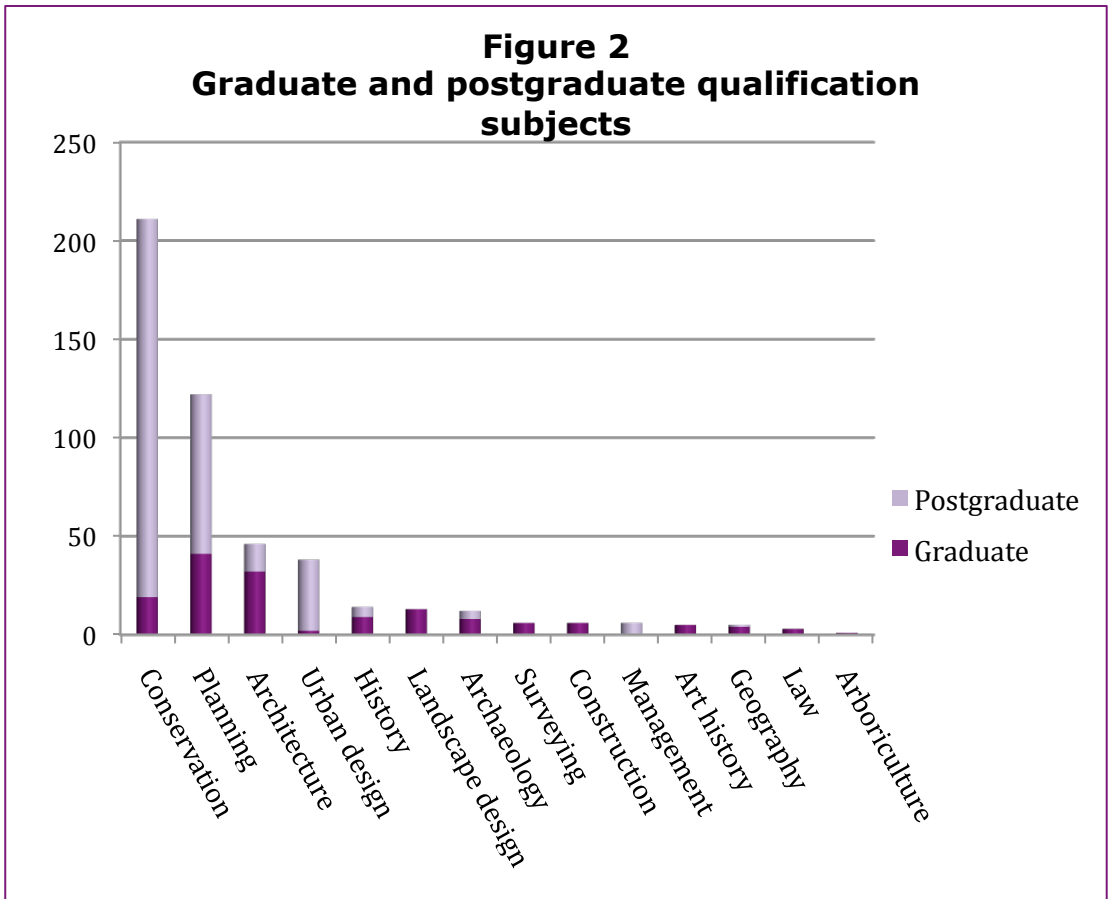
Conservation specialists qualifications

Number of Graduate Qualifications	Number
Unknown BA	136
Unknown BSc	48
Planning	41
Architecture	31
Conservation	19
History	9
Archaeology	8
Surveying	6
Art history	5
Geography	4
Law	3
Urban design	2
Arboriculture	1

Number of Post-Graduate Qualifications	
Conservation	192
Planning	81
Unknown MA	59
Urban design	36
Unknown MSc	32
Architecture	14
Landscape design	13
PhD/MPhil	7
Construction and building	6
Management	6
History	5
Archaeology	4
Geography	1

Figures given are number of responses





2.4 Members of professional bodies

The professional affiliations of 402 of those working in conservation were identified (see Table 4). There were a total of 550 professional memberships for these 402 people. With an average membership of 1.37 memberships per person many conservation professionals in local authorities are members of more than one professional body.

TABLE 4	
Membership of Professional bodies	
Institute of Historic Building Conservation (IHBC)	325
Royal Town Planning Institute (RTPI)	149
Royal Institute of British Architects (RIBA)	31
Architects Registration Board (ARB)	10
Institute for Archaeologists (IfA)	9
Royal Institution of Chartered Surveyors (RICS)	6
Landscape Institute	4
Fellow of the Society of Antiquaries or Fellow of the Society of Antiquaries Scotland (FSA & FSA (Scot))	4
Chartered Institute of Building	2
Architects Accredited in Building Conservation (AABC)	1
Other	9

Figures given are number of responses

Membership of two single professional bodies dominates conservation specialists who responded to the survey; 325 are members of the IHBC and this represents IHBC membership in 81% of the 402 posts identified, whilst 149 or 37% of the 402 posts are members of the RTPI. Membership of all other professional institutes and bodies when combined totalled 76, which is 19% of the total number of posts. The strong IHBC membership highlights the specialist conservation background of these post-holders. The number of RTPI members indicates a planning background of some type. Both areas of membership can be related simply to the dominance of qualifications in conservation and planning discussed previously.

2.5 Desk based survey: interim conclusions

The desk-based survey established a critical profile of a service populated by highly skilled practitioners, often formally trained or qualified in conservation with extensive

multi-disciplinary vocational and educational backgrounds underpinning their skill sets.

580 conservation posts and their post-holders were identified and from these;

- The qualifications of those working in 369 conservation posts were listed
- 42% or 314, qualifications were graduate level
- 58%, or 438, qualifications were post-graduate level.
- 56.6%, or 209, have conservation qualifications at either graduate or post-graduate level
- Each local authority conservation specialist has an average of 2.03 graduate or post-graduate qualifications
- Post-graduate conservation qualifications account for 26% of all qualifications held (192 qualifications).

The professional affiliations of 402 of those working in conservation were identified and include:

- 550 professional memberships for these 402 people, with an average of 1.37 professional memberships each. Very many are members of more than one professional body.
- 81% are members of the Institute of Historic Building Conservation (IHBC) (325 of 402 post-holders)
- 37% are members of the Royal Town Planning Institute (RTPI) (149 of 402 post-holders)
- 19% are members of other professional bodies including Architects Registration Board (ARB), Royal Institute of British Architects (RIBA), Landscape Institute (LI), Institute for Archaeologists (IfA) & Royal Institution of Chartered Surveyors (RICS) (76 of 402 post-holders)

A substantial body of skills is available in conservation services across England. But in the main measuring these skills has only applied to those authorities which maintain a conservation service in some form. The lack of such skills in some authorities may lead to inadequate practice or conservation outcomes and an investigation should be considered of if, and how, major conservation skills gaps can impact on the historic environment related performance of the whole local authority planning service.

3. Web survey: Gathering perceptions

3.1 Local Authority Conservation skills: a two-way assessment methodology

To assess the conservation skills currently available to local authorities, and to see how strong these are considered by both the conservation specialists and those who they work with or advise, conservation specialists in local authorities, other local authority officers and external conservation service users were invited to complete an internet based survey. Some 185 individual submissions were received.

This two-way survey assessment meant that the survey would secure a more balanced conclusion of skills, needs and priorities, from all those involved in working both in, and with, conservation services, and gives a more objective and reliable perspective. Likewise an assessment of the skills, which a competent and credible conservation service ought to have access to, provides a baseline for developing service standards and recruitment guidance.

The survey also looked at how the skills were gained and what were the preferred ways to expand skills. Access to time and money for training opportunities was examined. As well as looking at the simple facts of skills development, this information will be able to feed into training and skills development strategies to provide training opportunities that are tailored to preferred methods and need. A copy of the survey questions are included at Appendix 1.

The web-based survey was promoted to IHBC's membership and other service users including

- a. Local planning authority conservation officers (referred to in this report as conservation specialists to ensure all associated roles outside the simple term conservation officer are covered.)
- b. Local authority officers other than conservation officers (e.g. planners, archaeologists, etc)
- c. Users of conservation services including developers and property owners
- d. Amenity society representatives

The survey was promoted through many avenues including;

- a. IHBC’s own networks and communications including the regular NewsBlog service to members and non-members, digital networks (such as IHBC’s LinkedIn Group) and through the busy and active IHBC Branch network.
- b. Supporting bodies across the IHBC’s heritage, community and industry networks.
- c. IHBC’s key partner networks including liaison across key formal partners that provide links to the spectrum of historic environment users: professional, property owning and civic and trade bodies to ensure

The survey was open for responses for nine weeks from May to July 2013 and an exceptionally good and well-balanced return rate was obtained with 185 response in total made up from the following groups;

TABLE 5	
Survey respondents	
Local authority conservation specialists	52
Other local authority officer	21
Specialist conservation consultant working for the local authority	4
Specialist conservation consultant working outside the local authority and using local authority services	52
Home owner, developer or other applicant	33
Representative of an amenity body	23
Total respondents	185

3.2 Skills to support a service

Survey respondents were asked to rate the importance of various skills to the creation or maintenance of a competent local authority conservation service.

The number of responses for each skill and the relevant level of importance were tabulated as can be seen below. This allows a majority opinion to be drawn out but still also shows clearly any other opinions that might be taken into account. In

Tables 6a, 6b and 6c the skills ranking is tabulated for views received from inside local authorities, from outside local authorities and as a combined total of all opinions.

TABLE 6

Which skills do you feel are important for future maintenance or development of any competent local authority conservation service?

TABLE 6a

Inside local authority

	Crucial	Valuable	Useful	Not necessary
Conservation Philosophy	52	12	1	0
Standards of conservation practice	55	10	0	0
History	29	32	3	0
Research & recording	24	36	5	0
Data management	18	33	14	0
Conservation Legislation	63	2	0	0
Conservation Policy	59	5	0	0
Finance & economics	13	33	18	1
Heritage at Risk	47	16	2	0
Project development	11	42	11	1
Project management	10	39	16	0
Design & Presentation	21	36	6	2
Engagement, advocacy & outreach	34	23	6	1
Use of materials & repairs to historic buildings	60	5	0	0
Condition assessment	44	20	1	0
'Green' skills	17	35	12	1

Figures given are number of responses

TABLE 6b**Outside Local Authority**

	Crucial	Valuable	Useful	Not necessary
Conservation Philosophy	33	25	4	0
Standards of conservation practice	38	22	1	0
History	18	34	8	1
Research & recording	17	30	15	0
Data management	9	30	19	1
Conservation Legislation	51	9	2	0
Conservation Policy	43	17	2	0
Finance & economics	13	29	19	0
Heritage at Risk	34	24	4	0
Project development	9	34	16	1
Project management	9	26	21	2
Design & Presentation	12	24	19	3
Engagement, advocacy & outreach	16	31	10	1
Use of materials & repairs to historic buildings	49	12	1	0
Condition assessment	35	24	2	0
'Green' skills	7	38	15	1

Figures given are number of responses

TABLE 6c**Combined totals**

	Crucial	Valuable	Useful	Not necessary
Conservation Philosophy	85	37	5	0
Standards of conservation practice	93	32	1	0
History	47	66	11	1
Research & recording	41	66	20	0
Data management	27	63	33	1
Conservation Legislation	114	11	2	0
Conservation Policy	102	22	2	0
Finance & economics	26	62	36	1
Heritage at Risk	81	40	6	0
Project development	20	76	27	2
Project management	19	65	37	2
Design & Presentation	33	60	25	5
Engagement, advocacy & outreach	50	54	16	1
Use of materials & repairs to historic buildings	109	17	1	0
Condition assessment	79	44	3	0
'Green' skills	24	73	27	1

Figures given are number of responses

There was almost complete consensus between those inside and outside the local authority on what skills were most important. Only engagement, advocacy and outreach were considered differently by the majority. The majority view of those inside local authorities, perhaps realising the need for advocacy skills in the negotiation process, was that it was an essential skill whilst those outside, who might benefit most from the service which had good engagement, advocacy and outreach skills predominantly felt it to be a valuable skill.

The majority of suggested skills were consistently ranked as crucial or valuable but a small number spread opinion across all levels of necessity. Design and presentation was the skill area ranked as not necessary by the most respondents. This is especially surprising given that 14 of 53 posts whose job titles were recorded (see below) included design in their title and that many conservation specialists are heavily involved in work on design matters in both historic areas and in urban design of new build throughout their area. It has been suggested that this may result from alternative understandings of what was intended by design but the commonly high involvement in design, and indeed the fact that 14 of the posts (see Appendix 2) have the term design in their job title, makes this unlikely. Data management, Finance & economics, Project development, Project management and 'Green' skills were also skills areas which had a suggestion of being less important to the maintenance of a competent service.

In conclusion the following skills were considered by the majority of respondents to be crucial to the future maintenance or development of any competent local authority conservation service:

1. Conservation Philosophy
2. Standards of conservation practice
3. Conservation Legislation
4. Conservation Policy
5. Heritage at Risk
6. Condition assessment
7. Use of materials & repairs to historic buildings

The skills considered by the majority of respondents to be valuable to the future maintenance or development of any competent local authority conservation service were:

1. History
2. Research & recording
3. Data management
4. Finance & economics
5. Project development
6. Project management

7. Design & Presentation
8. Engagement, advocacy & outreach
9. 'Green' skills

3.3 Current conservation skill levels

Having looked at the skills which were considered important to the creation and maintenance of a competent conservation service, the survey went on to look at how well provided current conservation services are with officers who possess these crucial skills.

Conservation specialists in local authorities, other local authority officers and external conservation service users were asked to complete a survey to assess the conservation skills currently available to local authorities and how strong these are considered by both the conservation specialists and those who they work with or advise.

This two-way assessment enables a balanced conclusion of actual skills to be made. An assessment of skills, from all those involved both in working in and with conservation services, gives a more balanced and reliable perspective.

The categories used to define skills levels mirror those used by the IHBC in measuring competence for assessment of Full Member applications⁷. They examine the level of current skill, how competent the person should be in this area and what further instruction might be required:

1. Unaware; with little or no knowledge or skills.
2. Aware; with basic knowledge or skills. Unable to work on this area without supervision. Requiring training/development and more in-depth information
3. Capable; with adequate knowledge or skills. Able to work with some autonomy or effectively as part of team but require guidance or some further training
4. Skilled; possessing knowledge or skills to perform effectively and efficiently. Able to work with considerable autonomy.

⁷ IHBC application form guidance at <http://www.ihbc.org.uk/join/apply/index.html>

TABLE 7

Conservation Specialists; What do you feel is your own skill level in the following areas?

	Unaware	Aware	Capable	Skilled
Conservation Philosophy	2	3	13	48
Standards of conservation practice	2	4	15	44
History	0	4	29	32
Research & recording	1	9	26	30
Data management	2	11	35	17
Conservation Legislation	1	5	18	43
Conservation Policy	1	5	17	43
Finance & economics	8	21	26	11
Heritage at Risk	3	7	20	36
Project development	1	16	26	23
Project management	2	13	33	17
Design & Presentation	0	7	35	24
Engagement, advocacy & outreach	1	11	34	20
Use of materials & repairs to historic buildings	4	5	17	40
Condition assessment	4	7	25	30
'Green' skills	2	17	37	10

Figures given are number of responses

TABLE 8

Conservation service users; What skills do you believe the local authority conservation officers you deal with have?

	Unaware	Aware	Capable	Skilled
Conservation Philosophy	3	13	27	18
Standards of conservation practice	5	12	26	20
History	7	15	30	11
Research & recording	7	22	21	9
Data management	9	23	18	6
Conservation Legislation	1	8	24	27
Conservation Policy	1	11	27	21
Finance & economics	13	27	9	7
Heritage at Risk	5	20	19	15
Project development	10	27	15	7
Project management	13	29	10	7
Design & Presentation	8	23	17	10
Engagement, advocacy & outreach	12	20	17	9
Use of materials & repairs to historic buildings	11	14	16	20
Condition assessment	7	20	17	14
'Green' skills	10	25	18	5

Figures given are number of responses

The skill level which attracted the highest responses (between 34% and 55%) and the second highest response (between 25% and 34%) have both been highlighted in Table 9 to suggest an overall assessment of the current skill levels of local authority conservation specialists.

TABLE 9

Current Local Authority Conservation Skills levels; all respondents.

	Unaware	Aware	Capable	Skilled
Conservation Philosophy	4%	13%	31%	52%
Standards of conservation practice	5%	13%	32%	50%
History	5%	15%	46%	34%
Research & recording	6%	25%	38%	31%
Data management	9%	28%	44%	19%
Conservation Legislation	2%	10%	33%	55%
Conservation Policy	2%	13%	34%	51%
Finance & economics	17%	39%	29%	15%
Heritage at Risk	6%	22%	31%	41%
Project development	9%	34%	33%	24%
Project management	12%	34%	35%	19%
Design & Presentation	6%	24%	43%	27%

Engagement, advocacy & outreach	10%	25%	42%	23%
Use of materials & repairs to historic buildings	18%	23%	26%	33%
Condition assessment	12%	34%	30%	24%
'Green' skills	17%	43%	31%	9%

Figures given are a percentage of all responses from inside and outside Local Authorities combined. Highest and second highest response areas highlighted.

Overall the highest number of respondents felt that conservation services already have extensive skills and reach the level of Skilled, possessing knowledge or skills to perform effectively and efficiently, in the areas of;

- Conservation Philosophy
- Standards of conservation practice
- Conservation Legislation
- Conservation Policy
- Heritage at Risk
- Use of materials & repairs to historic buildings

In certain areas conservation services have a Capable skills level, having adequate knowledge or skills:

- History
- Research & recording
- Data management
- Project management
- Design & Presentation
- Engagement, advocacy & outreach

In certain skills areas conservation services are felt by the majority to only reach the level of Aware, that of having basic knowledge or skills.

- Finance & economics
- Project development
- Condition assessment
- 'Green' skills

In no areas was there a consensus that conservation services are currently unaware with little or no knowledge or skills

There are some differences in the perception of skills levels between those inside local authorities and those outside (Tables 7 and 8). It is likely, based on the anecdotal experience of the IHBC through discussions with outside bodies and applicants and with local authority conservation specialists, there are clear reasons for these extremes of opinion. Conservation specialists in local authorities seem to assess their abilities with a sense of realism and often underplay their own abilities. Whilst those customers, applicants and agents who indicate the authority has the lowest levels of skill points to a small number of people who have had a problem with one authority and possibly one application. But generally, the level of consensus between those inside and outside local authorities is much greater than might initially have been anticipated at the outset of this research.

3.4 Skills development priorities

By mapping the majority responses from the survey for the levels of current skills against an assessment of how valuable and necessary each skill is felt to be, by both conservation specialists and service users, to the creation and maintenance of a competent conservation service, allows us to prioritise skills development for local authority conservation staff (see Table 10).

TABLE 10

Skills needs and priorities for effective conservation services

	Skills needed	Current skills level	Skills development needed
Conservation Philosophy	Crucial	Skilled	Maintain skills
Standards of conservation practice	Crucial	Skilled	Maintain skills
History	Valuable	Capable	Priority 3
Research & recording	Valuable	Capable	Priority 3
Data management	Valuable	Capable	Priority 3
Conservation Legislation	Crucial	Skilled	Maintain skills
Conservation Policy	Crucial	Skilled	Maintain skills
Finance & economics	Valuable	Aware	Priority 2
Heritage at Risk	Crucial	Skilled	Maintain skills
Project development	Valuable	Aware	Priority 2
Project management	Valuable	Capable	Priority 3
Design & Presentation	Valuable	Capable	Priority 3
Engagement, advocacy & outreach	Valuable	Capable	Priority 3
Use of materials & repairs to historic buildings	Crucial	Skilled	Maintain skills
Condition assessment	Crucial	Aware	Priority 1
'Green' skills	Valuable	Aware	Priority 2

The mapping produces a series of phased priorities for skills development to ensure a rounded level of skills across the board but also to highlight development of those skills considered to be most Crucial.

Priority 1

A Crucial skill area where the level of current skill is only at 'aware' level. Development of this skill should be carried out in all immediate training opportunities

- Condition assessment

Priority 2

Valuable skills which are only at the 'aware' level of current skill. Training opportunities over the next two years should aim to focus on these

- Finance & economics
- Project development
- 'Green' skills

Priority 3

Valuable skills which are currently at 'capable' level and could be enhanced to 'skilled' level. Training opportunities in the longer term could consider these skills

- History
- Research & recording
- Data management
- Project management
- Design & Presentation
- Engagement, advocacy & outreach

Maintain skills

Crucial skills which are currently at 'skilled' level should be maintained and developed to ensure they are kept up to date and not lost or diminished from the conservation workforce

- Conservation Philosophy
- Standards of conservation practice
- Conservation Legislation

- Conservation Policy
- Heritage at Risk
- Use of materials & repairs to historic buildings

This does not mean that other skills not looked at in this work might also need to be developed, enhanced and maintained but does give a robust starting point for key skills.

3.5 Skills development

Having looked at what skills conservation specialists have, the survey went on to ask how these skills had been developed and how skills might be developed in the future. Table 11 shows the methods through which current skills have been developed and highlights the three most common ways of developing each skill.

Practical on the job experience was the most frequently used way of developing new skills over most skill areas but there was also a strong trend towards longer courses, which lead to a qualification at the end. Qualification based courses were, in general, used to develop more academic study based subjects such as history and conservation philosophy.

There was a very identifiable overall trend of skills having being developed through longer qualification based courses and through on the job training. This is the traditional route to professional skills of undertaking a longer-term qualification and then continuing to develop skills over time once in employment. The course may provide the basic skills needed to take up work in the area and give an academic grounding but these skills will develop further based on practical experience.

Short courses had been used more to develop practical processes such as project development, project management and data management. There was also a role for short courses in teaching certain technical aspects of historic building repair. Often these courses concentrate on a certain building type, material or problem and can look in depth at that issue over a relatively short period of time (between one day and three days in general).

Meetings of local professional bodies were popular for developing skills with a legislative emphasis such as Conservation Legislation, Conservation Policy and Heritage at risk and areas that may benefit from collaborative approach and discussion of opinions such as Conservation Philosophy or Standards of conservation practice.

E-learning and web forums had not yet made a substantial impact on the skills development of conservation specialists although the area where most use had been made of this method was in the relatively new and quickly developing area of 'green' skills.

TABLE 11

How have you developed your skills?

	Short course	Longer course leading to a qualification	Private study	Practical experience and on the job training	Local professional body meetings and events	E-learning or web forums	Have not developed this skill
Conservation Philosophy	8	43	14	34	17	4	2
Standards of conservation practice	17	40	15	42	23	4	3
History	5	43	27	26	11	3	1
Research & recording	5	36	9	37	10	3	2
Data management	8	11	8	44	4	3	1
Conservation Legislation	14	37	17	41	19	7	3
Conservation Policy	13	33	15	42	21	6	3
Finance & economics	5	21	5	35	6	2	12
Heritage at Risk	13	21	10	48	18	3	4
Project development	8	14	5	43	4	1	8

Project management	14	16	4	43	4	2	6
Design & Presentation	8	30	13	43	10	4	4
Engagement, advocacy and outreach	7	6	7	47	12	1	5
Use of materials & repairs to historic buildings	23	39	18	48	20	9	4
Condition assessment	6	30	7	45	8	4	5
'Green' skills	15	6	14	38	15	11	9

Figures given are number of responses. Highest, second and third highest response areas highlighted.

Looking back at how skills have been developed for existing conservation specialists gives a picture of the long-term history of the skills training landscape and may continue to be the ways which new entrants to the conservation profession begin to acquire and then go on to develop their skills. But it only goes some way towards providing a framework that will successfully help skills development in current conservation staff. Conservation specialists responding to the survey were asked for their preferred method of developing their skills.

Once a certain level of skill has been acquired the continuing development of skills in the workplace will probably be by different methods to those initially used to develop skills. A longer qualification course may no longer be necessary, practical or possible and is the preferred method of skills development for only 24 of the 187 conservation officers responding to this part of the survey.

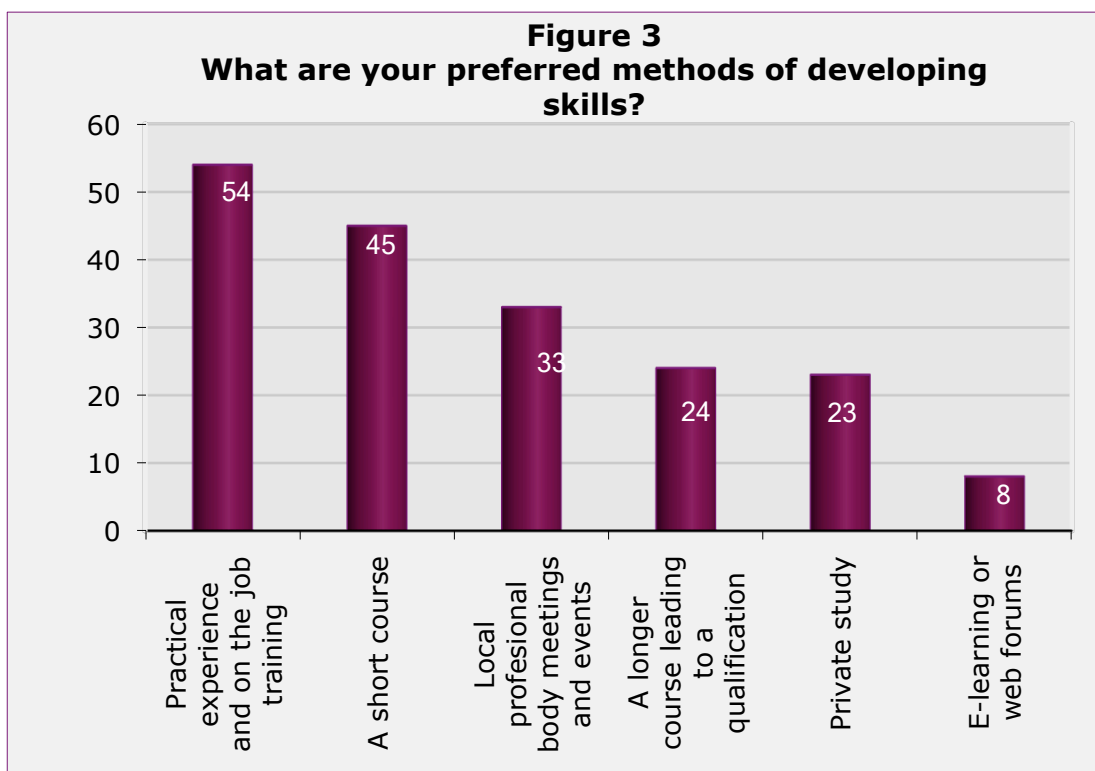
Short courses were the most popular type of more formal structured learning. Providers of short courses should note the continued demand for this form of training. It allows a focused and concentrated learning experience with others and away from the distractions of the workplace.

But practical experience and on the job training was appreciably the most preferred method of future skills development. This could take one of a number of forms from structured mentoring with a more experienced staff member to less structured acquisition of skills through the necessity to carry out new tasks and learn along the way. Both may be valid depending on the level of existing skill and the complexity of

the skills being developed. For example, a new conservation officer who has, as can be the case, been moved from another planning related role without formal conservation training, might need a carefully structured training programme with help from a suitably experienced colleague. Without this there is a risk of poor quality, inaccurate and inconsistent grasp of the skills. A more experienced conservation officer with an academic conservation grounding may be able to develop existing basic skills to a more skilled level through carrying out tasks.

Private study is strongly related to on the job training. Often private study can be generated as the result of an area of work needing to be done but requiring skills or knowledge the officer might not have. These skills can be developed through private study.

E- learning and web forums were not a very popular option for skills development. IHBC feedback on training and internal network analysis indicates this may be because it does not offer any personal interaction and discussion, which appears to be valued in many other training opportunities. The modern workplace and social sphere are both dominated by interaction with IT, an additional layer of computer activity may not be welcomed.



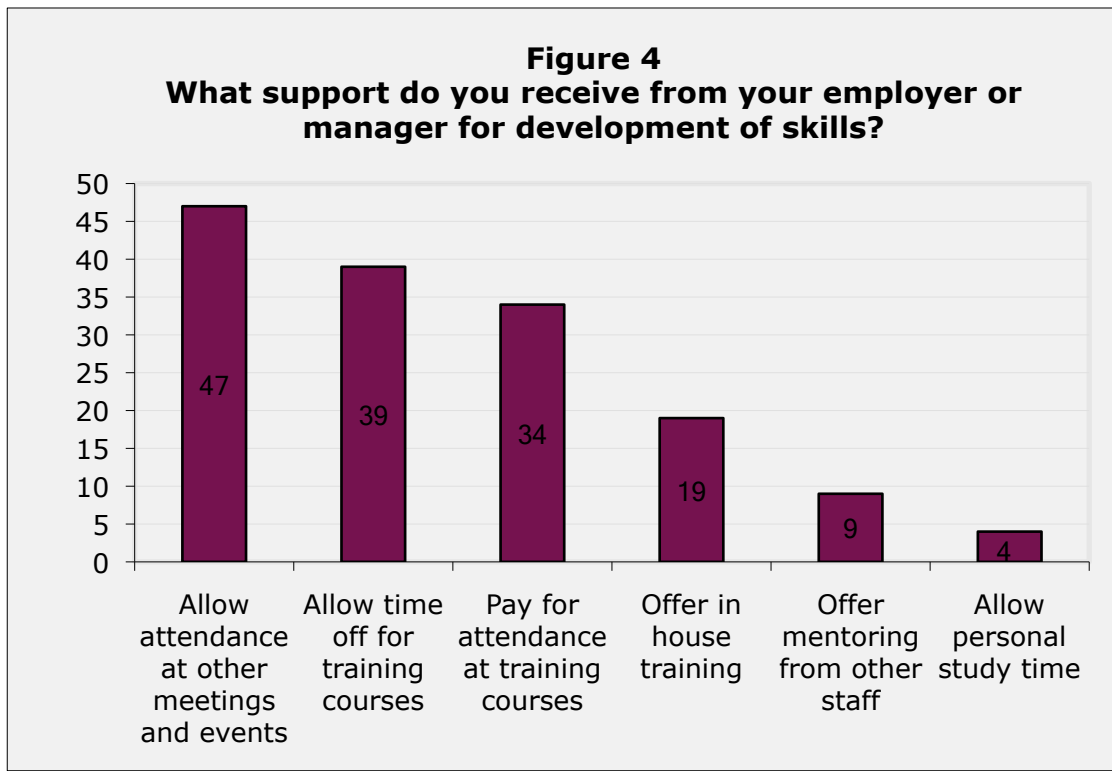
Figures given are number of responses.

Planning for skills development does not only require identification of skills gaps and preferred training methods, but needs some idea of what is feasible, looking at both financial capacity for training and time available within working hours. The survey asked conservation specialists what support they received from their employer in the development of their skills (see Figure 10). Of 152 responses to this question the greatest numbers of respondents were allowed time for training; meeting and events (47 respondents or 31%) and training courses (39 respondents or 26%).

Payment of training course fees by employees was still an option for 34 respondents or 22%. Whether this is a decrease on previous levels is not known but there is certainly an anecdotal view that training budgets are being cut and there is less opportunity for attendance on courses which have a cost attached. Indeed one respondent noted that they had a very limited training budget. Whether there has been a decrease in finance for training or not it is clear that finances are limited. This does not necessarily mean that training which has a cost attached will not be a possibility but it must be of good quality and cost effective. The experience of the IHBC Annual School, which is a three day intensive training event, but is able to provide an all inclusive residential package for the same price as some day conferences, is that local authority staff are still attending and some are paying for themselves to attend. The 2012 IHBC Annual School attracted 239 delegates and of these 104 (or 44%) were local authority employees compared to 70 delegates (or 29%) from private practice.

In-house training is offered by the employers of 19 respondents (or 12%) and 9 respondents (or 6%) were offered mentoring from other staff. These are cost limited and cost effective training methods but they do still have a potential cost because of staff time and possible recharges.

Time for personal study is only offered in limited instances (4 responses or 3%) but study of this type, if carried out, is probably more likely to be in ones own time.



Figures given are number of responses.

3.6 Graduate and postgraduate Conservation courses

In order to create and maintain a competent conservation service the majority views was that the certain skills are crucial to this and must be held at a skilled level whilst others are valuable and should be held at some competent level. Those which were perceived as crucial were;

1. Conservation Philosophy
2. Standards of conservation practice
3. Conservation Legislation
4. Conservation Policy
5. Heritage at Risk
6. Condition assessment
7. Use of materials & repairs to historic buildings

As is to be expected, the crucial skills replicate very closely those skills commonly found in the course programme for many formal conservation courses⁸.

Many take the view that a series of short courses and on the job learning will provide those with no conservation skills, experience or background with enough knowledge to be a conservation specialist. This trend is especially strong in authorities that have dispensed with their existing specialist conservation officers and given a notional conservation post to an internal appointee⁹.

Conservation courses not only develop skills in their taught sessions but also, as many of the students have existing experience in either conservation or associated professions, much is learnt from discussion amongst students. A short course or workplace learning can enhance this valuable education but cannot and should not try to replace it. Conservation courses teach the crucial basic skills which when coupled with experience and further training can create a competent conservation service. Without this level of training and with no strong alternative in place conservation services cannot hope to be properly and expertly equipped.

⁸ The IHBC recognises conservation courses (http://www.ihbc.org.uk/ed_train/recognised_courses/index.html) and the Institute confirms that the course achieves a standard that should allow its graduates to satisfy IHBC membership criteria, where supplemented by a suitable balance of professional experience

⁹ Survey work for Quantifying Local Authority Conservation Staffing 2006-12

3.7 Conservation specialists post seniority

The full list of job titles of those conservation specialists who responded to the survey is shown at Appendix 3 but Table 12 groups these posts into levels of seniority. The survey also asked for the seniority level of the most senior conservation professional in the Authority (Table 13). Taken together both questions provide a better cross section of conservation roles in local authorities. The categories of post are shown beginning with the most senior in both tables and accord with those suggested as typical to local authorities¹⁰. Almost half of the conservation specialist survey respondents (49%) were below senior officer level. This, despite their extensive professional qualifications as shown above, an average of 2.03 graduate or post-graduate qualifications and membership of 1.37 professional bodies each. Management and principal officer posts were occupied by only 17% of survey respondents. Overall the most senior conservation professionals in each Authority were more senior than those responding to the survey but the picture at management level is exactly the same with both 5% of survey respondents and senior conservation professionals occupying management posts.

It is especially revealing that of the most senior conservation professionals in the 56 authorities responding to this question 63% are at senior officer and below. This generally low level of actual seniority by those who are the most senior echoes the findings of the IHBC Research Note 2013/1 which reported that in 2011 over a third of the 6% decline in conservation staff in England was amongst senior staff (those at Principal level and above and mainly known to be over 55).¹¹ Loss of staff results from redundancy, either compulsory or personal choice, from staff leaving for unspecified reasons and from retirement. Those who are senior, both in organizational status and in age, generally have more experience and knowledge both of the wider conservation role and of their geographical area of work and their loss to conservation services considerable. Younger and more junior staff are not able to inherit the skills and knowledge from those with experience.

¹⁰ 'Local Government today' JA Chandler (Manchester University Press, 2009)

¹¹ IHBC Research Note 2013/1

Loss of senior conservation staff and senior conservation posts in England: March 2011 – April 2012
<http://ihbc.org.uk/news/docs/IHBC%20Research%20Note%202013-1%20-%20Loss%20of%20senior%20staff%20in%20England%202011-12.pdf>

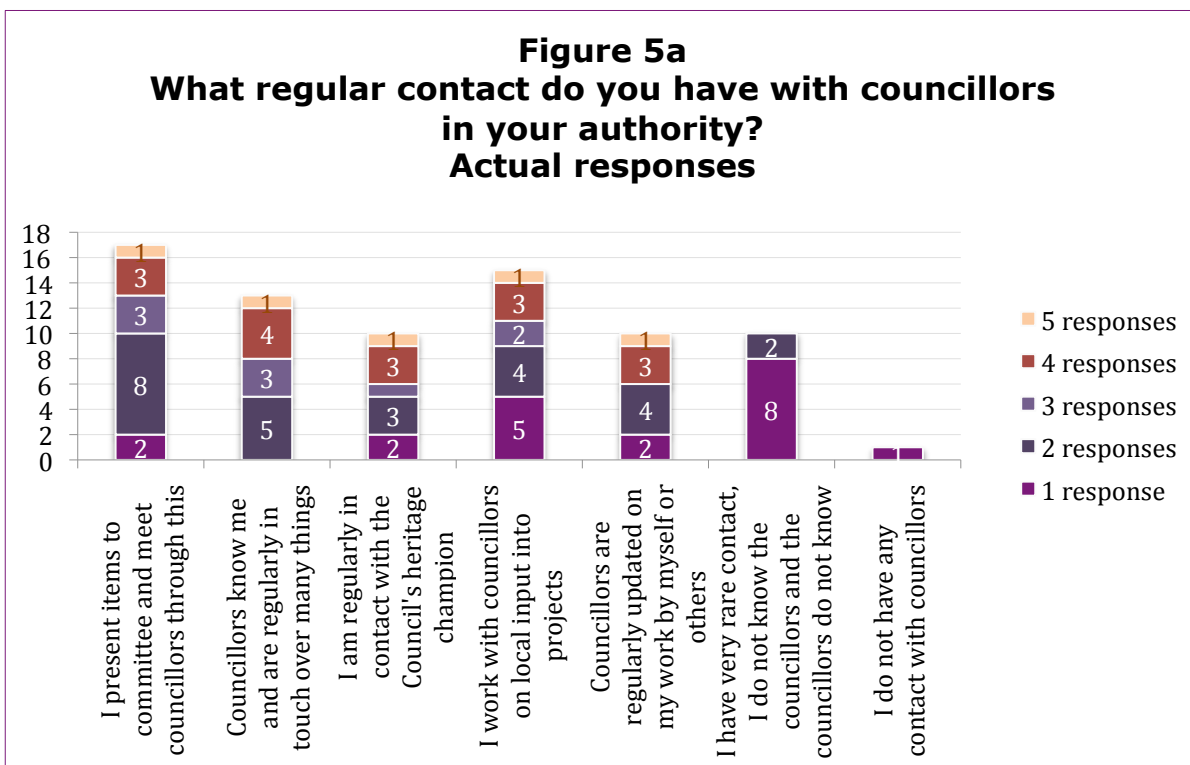
TABLE 12	
Survey respondents level of post	
Management post	5%
Principal officer	11%
Senior officer	28%
Below senior officer	49%
Other posts	7%

TABLE 13	
Level in the Authority of the most senior conservation professional?	
Chief Executive	0%
Director	0%
Head of service	5%
Principal Officer	32%
Senior Officer	43%
Below senior officer	20%

3.8 Political influence

The web based survey as well as asking about skills and skills development also asked conservation specialists about their level of political involvement and, by extension, their level of political influence.

Conservation specialists responding to the survey were asked what regular contact they had with councillors (See Figure 5). Regular contact of some type was common in 73% of the authorities that responded (30 of 41 people responding to this question), with 27% having limited or no contact. Because interaction with councillors can happen in a number of areas respondents were given the opportunity to select more than one way they have contact with councillors. It is possible for conservation specialists to be involved with councillors over local projects, through committee presentation, through regular updates to councillors or through general contact. Even though some respondents will have chosen more than one option conclusions can be drawn generally if the fact that multiple options may have been chosen as long as this is made clear. Figure 5 divides the responses showing the number of various options selected. Most contact was through work with councillors on local input into projects and presenting items to committee & meeting councillors through this. Only one respondent had no contact at all with councillors.



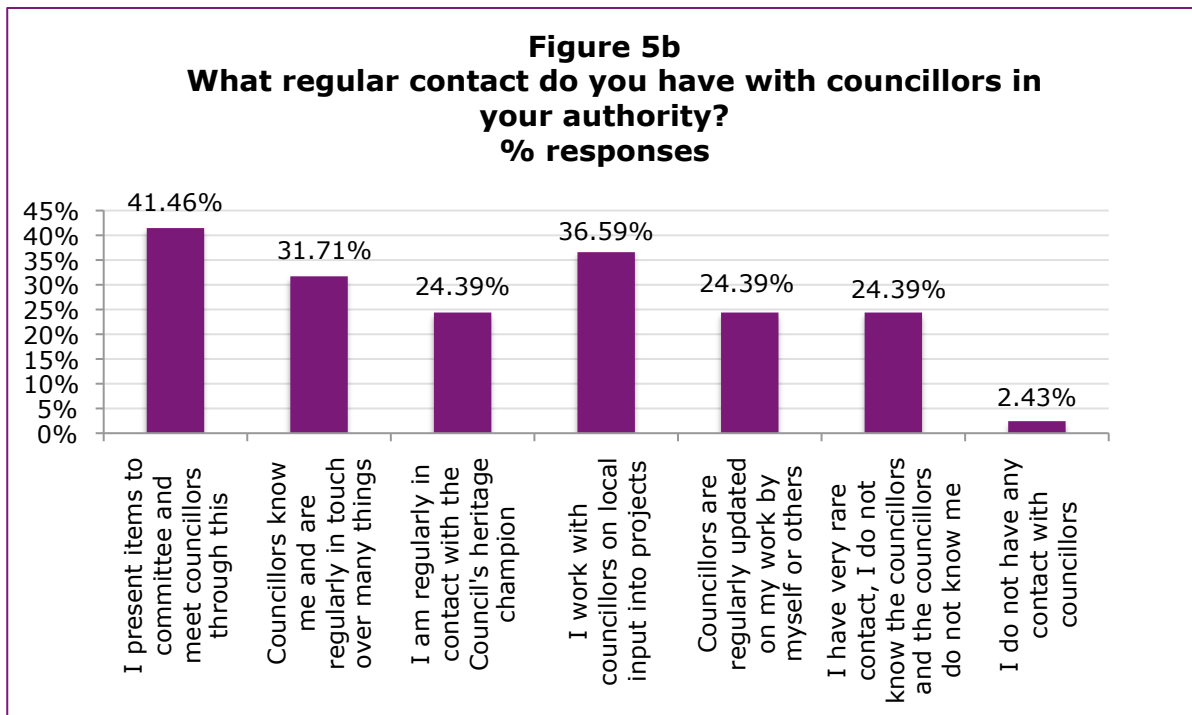


Table 14 shows the actual responses to this question to show the balance. Not unsurprisingly conservation specialists who have very little contact with councillors did not select other ways that they might have been involved with them.

Contact with Councillors is unchanged in many cases with 55% having the same contact as they had three years ago (see figure 6), 29% have more contact but 16% have less.

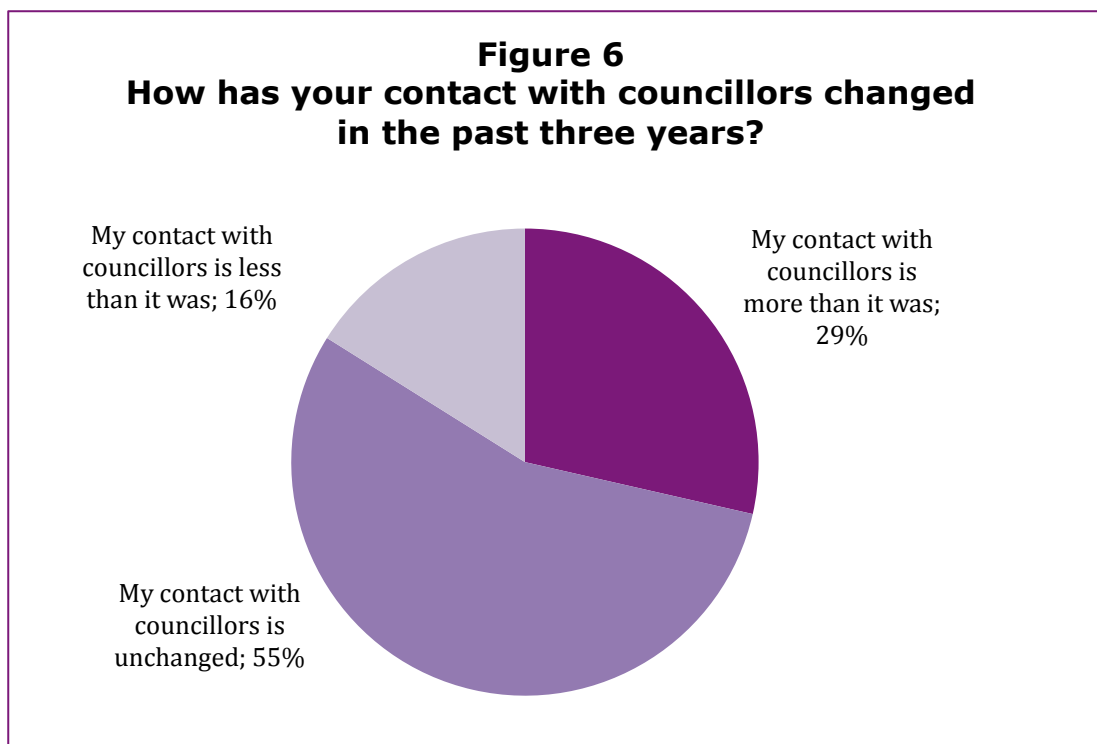
Some of those whose contact had declined explained the background:

“I used to have a very positive relationship with members. They were involved with projects and I knew most of them. They were all keen on conservation work. Ward councillors are now less involved in hands on work. The cabinet members are the only ones who are heavily involved but they are not interested in conservation.”

“I used to present items to Committee and have regular contact with councillors but changes to structures and procedures have changed all that. Many councillors still know me but tend to only get in touch on an 'as and when' basis, normally linked to something in their patch. Our Heritage Champion recently stood down and has not been replaced despite his best efforts to get a replacement.”

Whilst the issue of Councillor contact is not so immediately serious as was perhaps anticipated when this additional area was added to this project, it is an important area to monitor. With knowledge of the conservation specialist and their work Councillors are more likely to be able to:

1. Make informed decisions on historic environment planning decisions and on Council owned property
2. Support conservation schemes
3. Ensure that in the culture of conservation job cuts, which has seen almost a third of conservation jobs lost in England since 2006¹², the role of the conservation specialist is valued and retained.
4. Support funding for the historic environment
5. Advise members of the public of the correct contact for historic buildings.



¹² A fourth report on Local Authority Staff Resources. Produced by English Heritage, the Association of Local Government Archaeological Officers and the Institute of Historic Building Conservation August 2012 <http://www.ihbc.org.uk/news/docs/Report%20on%20LA%20capacity%20in%20England%20IHC%20EH%20ALGAO%204th%20report%202012.pdf>

14. Conclusion to the web survey

The web survey, like the desktop survey, also confirms that there is a substantial body of skills already identifiable within England's Local Planning Authorities.

It also concludes that conservation specialists are generally at a low level of internal seniority despite their experience and qualifications. In spite of this status their contact with Councillors, and by extension political influence, is good:

- 49% in local authorities were below senior officer level
- 17% in local authorities were at Principal Officer or above
- The most senior conservation professional in 63% in 56 authorities are at senior officer level or below
- 73% of conservation services in authorities that responded have regular contact with their Councillors
- 27% of conservation services in authorities that responded have little or no contact with their Councillors

As it is not possible to cross-reference between service outcomes and service skills, no specific further conclusions may be drawn about the balance between service skills and service outcomes.

However there is a clear consensus across staff and users that support is needed in particular areas to develop critical skills to which England's conservation services need improved access.

Appendix 1

Survey form

IHBC is working with English Heritage to examine the areas of expertise currently existing in local authority conservation staff and to try to understand where gaps in skills exist.

We are asking conservation officers and conservation service users to complete this survey to give us some in depth knowledge of the skills available to local authorities. we would be very grateful if you could spare a few minutes to supply this information which will not be made public in anything but a general statistical form and will not identify individuals at any time.

1. Are you;

- A local authority conservation officer
- Other local authority officer
- A specialist conservation consultant working for the local authority
- A specialist conservation consultant working outside the local authority and using local authority services
- A home owner, developer or other applicant
- A representative of an amenity body

For local authority staff

2. What do you feel is your own skill level in the following areas?

	UNAWARE; little or no knowledge or skills.	AWARE; basic knowledge or skills. Unable to work on this area without supervision. Require training/development and more in-depth information	CAPABLE; adequate knowledge or skills. Able to work with some autonomy or effectively as part of team but require guidance or some further training	SKILLED; possess knowledge or skills to perform effectively and efficiently. Able to work with considerable autonomy.
Conservation Philosophy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Standards of conservation practice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
History	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research & recording	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Designation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Data management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation Legislation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation Policy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finance & economics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Heritage at Risk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Design & Presentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Engagement, advocacy and outreach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of materials & repairs to historic buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Condition assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
'Green' skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Which skills do you feel are important for future maintenance or development of any competent local authority conservation service?

	Crucial	Valuable	Useful	Not necessary
Conservation Philosophy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Standards of conservation practice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
History	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research & recording	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Data management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation Legislation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation Policy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finance & economics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Heritage at Risk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Design & Presentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Engagement, advocacy and outreach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of materials & repairs to historic buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Condition assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
'Green' skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

For local authority staff

4. How have you developed your skills?

	A short course	A longer course leading to a qualification	Private study	Practical experience and on the job training	Local professional body meetings and events	E-learning or web forums	Other (please explain below)	Haven't developed this skill
Conservation Philosophy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standards of conservation practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
History	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research & recording	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conservation Legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conservation Policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance & economics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heritage at Risk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Design & Presentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement, advocacy and outreach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use of materials & repairs to historic buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
'Green' skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other (please specify)

5. What are your preferred methods of developing skills?

- A short course
- A longer course leading to a qualification
- Private study
- Practical experience and on the job training
- Local professional body meetings and events
- E-learning or web forums

Other (please specify)

For local authority staff

6. What is the job title for your current position?

**7. What is the level in the Authority of the most senior conservation professional?
Please select the closest equivalent.**

- Chief Executive
- Director
- Head of service
- Principal Officer
- Senior Officer
- Below senior officer

Other (please specify)

8. What support do you receive from your employer or manager for development of skills?

- Pay for attendance at training courses
- Allow time off for training courses
- Allow attendance at other meetings and events
- Allow personal study time
- Offer mentoring from other staff
- Offer in house training

Other (please specify)

**9. What regular contact do you have with councillors in your authority?
(Choose as many as apply)**

- I present items to committee and meet councillors through this
- Councillors know me and are regularly in touch over many things
- I am regularly in contact with the Council's heritage champion
- I work with councillors on local input into projects
- Councillors are regularly updated on my work by myself or others
- I have very rare contact, I do not know the councillors and the councillors do not know me
- I do not have any contact with councillors

Other (please specify)

10. How has your contact with councillors changed in the past three years?

- My contact with councillors is more than it was
- My contact with councillors is unchanged
- My contact with councillors is less than it was

If your contact has changed please say why you think this is the case.

For those outside the Local Authority

13. What skills do you believe the local authority conservation officers you deal with have?

	UNAWARE; little or no knowledge or skills.	AWARE; basic knowledge or skills. Unable to work on this area without supervision. Require training/development and more in-depth information	CAPABLE; adequate knowledge or skills. Able to work with some autonomy or effectively as part of team but require guidance or some further training	SKILLED; possess knowledge or skills to perform effectively and efficiently. Able to work with considerable autonomy.
Conservation Philosophy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standards of conservation practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
History	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research & recording	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conservation Legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conservation Policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance & economics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heritage at Risk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Design & Presentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement, advocacy and outreach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use of materials & repairs to historic buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
'Green' skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. Which skills do you feel are a necessary to ensure a competent Local Authority conservation service?

	Absolutely Crucial	Most Valuable	Quite Useful	Not necessary
Conservation Philosophy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Standards of conservation practice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
History	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research & recording	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Data management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation Legislation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation Policy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finance & economics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Heritage at Risk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Design & Presentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Engagement, advocacy and outreach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of materials & repairs to historic buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Condition assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
'Green' skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

Appendix 2

Key activities of the Historic Environment Service shown with relevant conservation skills assessed during this work.

Key activities taken from "Implementing the Heritage Protection Reforms: A Report on Local Authority and English Heritage Staff Resources".

Produced by English Heritage, the Association of Local Government Archaeological Officers and the Institute of Historic Building Conservation.
April 2009

Historic Environment Activity	Skills assessed
Data-related activity - general	Data management
Maintain statistics and other generic management data in relation to the historic environment. Maintain a register of and monitor all designated assets in council ownership Prepare state of the historic environment reports Contribute to the management of archives and records (artefact and documentary) including key files relating to listed buildings, listed building consents, etc. Prepare and maintain GIS information (on the planning system or SMR/HER)	

<p>Reports on service to corporate management (annual reports/assessment procedures etc)</p> <p>Identify and liaise with local conservation contractors and craft workers etc</p> <p>Provide (guide to) information for local history and local studies including photographic collections?</p>	
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Data-related activity – SMR/HER	Data management
<p>Maintain the sites and monuments records (SMR) / historic environment record (HER)(including built environment, terrestrial and Marine and managing local lists as well as information on undesignated assets etc)</p> <p>Enhancement of HERs</p>	

Data-related activity - designation	Conservation Legislation
<p>Maintain copies of the statutory lists for local consultation</p> <p>Identify and designate conservation areas, including consultation, inclusion of Article 4s etc</p> <p>Recommend and progress Tree Preservation Orders (often of historic significance)</p> <p>Advise on Certificates of Immunity (or equivalent) where applicable</p>	

<p>Investigate and serve Building Preservation Notices</p> <p>Provide advice to local authorities on potential of historic environment for designation, local and national</p> <p>Develop maintain and promote local lists</p> <p>Provide Historic Environment information to English Heritage for designation and advise accordingly</p> <p>Advise National Heritage Agencies on designation</p> <p>Work with other partners to encourage the inscription of World Heritage Sites and work on the management of inscribed sites.</p>	
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Data- related activity - Heritage at Risk	Heritage at Risk
<p>Maintain an Assets at Risk Register, (Heritage at Risk (HAR), etc) including surveys and Field Warden duties</p> <p>Monitor condition of un-designated HE assets</p>	

Research/Interpretation	Research & recording
	History
<p>Specify, or provide advice, on historic environment investigations e.g. for evaluation and interpretation purposes</p> <p>Prepare and/or contribute to national; regional and local research frameworks/ agendas or equivalent</p>	

<p>Manage and interpret heritage sites and attractions</p> <p>Author, contribute to, edit, fund and publish local guides on the historic environment.</p> <p>Specify, or provide advice, on non-rescue led historic environment investigations e.g. for evaluation and interpretation purposes</p> <p>Investigate and record – or oversee - historic assets (buildings & archaeology)</p>	
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Policy	Conservation Policy
<p>Contribute to, prepare and implement Local Development Frameworks, or their equivalent, including policies relating to the historic environment</p> <p>Undertake, commission, assess or require Strategic Environmental Assessments of plans</p> <p>Scope and assess EIA/SEA</p> <p>Prepare, or contribute to Supplementary Planning Documents relating to historic environment</p> <p>Prepare, or contribute to Community strategies and form Community Planning partnerships or equivalent</p> <p>Prepare planning briefs for new development affecting the historic environment, [including development outside the planning system]</p> <p>Prepare/contribute to council Cultural Strategy or equivalent</p> <p>Publish local guidance on the conservation of prehistoric and historic environments</p>	

<p>Prepare, maintain and implement local Heritage Strategy [or equivalent?]</p> <p>Prepare local HE guidance for developers</p> <p>Liaise with local/regional development agencies (or equivalent) in promotion of HE re heritage-led regeneration and its contribution to the sustainability agendas</p> <p>Take part in policy liaison on matters to do with the Historic Environment e.g. IHBC, ALGAO, national heritage agencies</p> <p>Contribute to local biodiversity (?) audits or equivalent</p>	
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Outreach - external	Engagement, advocacy and outreach Research & recording
<p>Act as point of contact for the public for local HE information</p> <p>Advise, promote and contribute to Regional/City Conservation Trusts or equivalent</p> <p>Work with national organisations charged with the promotion and conservation of the historic environment e.g. National Amenity Societies; Professional bodies; heritage agencies and property owning and developing trusts</p> <p>Act as point of contact for national heritage agencies and interests</p> <p>Undertake outreach/publicity on the historic environment</p>	

<p>through lectures, talks exhibitions etc.</p> <p>Run local Heritage Open Days and equivalent</p> <p>Liaise with museums service (including the collection, recording and preservation of artefacts)</p> <p>Foster voluntary HE work</p> <p>Provide or take part in education projects and programmes on the historic environment</p> <p>Administer and contribute to national and local HE award schemes</p> <p>Establish, manage and contribute to local amenity and heritage forums</p> <p>Liaison with major HE property and asset owners in area e.g. National Trust</p> <p>Contribute to local tourism forums including production and implementation of tourism strategy</p> <p>Provide professional training via seminars, CPD, student placements etc</p>	
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Outreach – internal	Engagement, advocacy and outreach
<p>Liaise across the local public service as informed HE leader, adviser and promoter</p> <p>Advise and guide planning (and related) committees and key LA representatives (including Champions) on HE and related design issues</p>	

<p>Monitor, maintain and support standards across the service, including liaison with quality assurance processes (prof. bodies; CPD etc)</p>	
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<p>Historic Environment Management- General</p>	<p>Conservation Philosophy</p> <p>Standards of conservation practice</p> <p>History</p> <p>Research & recording</p> <p>Conservation Legislation</p> <p>Conservation Policy</p> <p>Finance & economics</p> <p>Heritage at</p>
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	<p>Risk</p> <p>Project development</p> <p>Project management</p> <p>Design & Presentation</p> <p>Use of materials & repairs to historic buildings</p> <p>Condition assessment</p> <p>'Green' skills</p>
<p>Advise on the HE implications of the Building Regs, FENSA lists, etc</p> <p>Advise on the disposal of heritage assets within council guardianship e.g. redundant school buildings or affected land</p> <p>Advise on the building and adaptation of public buildings [under new legislation] e.g. schools and halls to new uses or to meet DDA, and smoking restrictions</p>	

<p>Provide advice to others responsible for the maintenance of historic bridges and viaducts</p> <p>Advise on the maintenance and repair of heritage assets and assets in conservation areas</p> <p>Provide advice to others responsible for the maintenance of heritage assets in council ownership and advising on property management issues as needed</p> <p>Develop and agree management guidelines for local authority historic assets, including the production (or manage the production by consultants) of conservation statements and conservation plans for local authority assets</p> <p>Contribute to management and enhancement of the public realm in general, including as appropriate undertaking urban design and related place making activities and public realm works, including those with historic environment interests, including on the maintenance and replacement of street surfaces and furniture</p>	
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Historic Environment Management- Heritage at Risk	Heritage at Risk
Take pro-active action over heritage at risk within the local authority area	

Historic Environment Management- Conservation Areas, etc	Conservation Philosophy
	Standards of conservation

	<p>practice</p> <p>Project development</p> <p>Project management</p> <p>Use of materials & repairs to historic buildings</p> <p>Condition assessment</p> <p>'Green' skills</p>
<p>Undertake conservation area appraisals and deliver conservation area management plans</p> <p>Prepare, consult and implement Article 4 Directions covering development in Conservation Areas [and local listing?]</p> <p>Bring forward schemes to conserve, enhance and improve conservation areas and comparable places</p> <p>Initiate and project manage projects for the conservation of heritage assets e.g. THIs; CAPS etc..</p>	

Provide advice to owners and others on the management of undesignated heritage assets	
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Historic Environment Management- Heritage Partnership Agreements	Conservation Philosophy Standards of conservation practice History Research & recording Data management Conservation Legislation Conservation Policy
Negotiate, oversee implement and review management agreements or equivalent (including HPAs)	

<p>Historic Environment Management- Development Control</p>	<p>Conservation Philosophy</p> <p>Standards of conservation practice</p> <p>History</p> <p>Research & recording</p> <p>Data management</p> <p>Conservation Legislation</p> <p>Conservation Policy</p> <p>Finance & economics</p> <p>Heritage at Risk</p>
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	<p>Design & Presentation</p> <p>Engagement, advocacy and outreach</p> <p>Use of materials & repairs to historic buildings</p> <p>Condition assessment</p> <p>'Green' skills</p>
<p>Specify investigative work in order to inform the process of determining an application for planning consent</p> <p>Specify investigative works arising from conditions applied as a result of granting of planning consent</p> <p>Advise on applications for consent, conservation area (or equivalent planning) consent and for works in conservation areas</p> <p>Investigate and record heritage assets affected by development proposals</p>	

Advise on Planning Applications with impact upon the Historic Environment

Participate in public inquiries and appeals

Advise on agri-related impacts on landscapes and heritage assets, including cultivation (Class 1 consents)

Advise on Petitions for Faculty, etc, (ecclesiastical exemption)

Advise on Marine Asset Consent, where applicable

Administer Hedgerow Regulations in respect of HE

Monitor, advise, process and instruct works to trees in conservation areas

Advise (esp. pre-application) on development impacts on HE

Advise on amendments to designated assets and conservation areas

Serve repairs notices (or equivalent) as required (Urgent Works Notices)

Promote and serve Compulsory Purchase Orders (or equivalent) as required

Monitor the implementation of approved alterations to listed buildings and conservation areas

Take enforcement action in the case of unauthorised works to designated assets and conservation areas

Provide HE advice and oversight to statutory undertakers and equivalent

Advise on relevant design aspects of proposals for new development and development initiatives with impacts on historic or sensitive areas, including urban design issues

Monitor compliance with specifications and professional

standards in work on the historic environment	
Provide HE and archaeological advice to the Forestry Commission and equivalent	
Advise on wider cultural assets, including battlefields, designed landscapes, cultural symbols, parks, cemeteries etc	
Provide audits for agri-environment scheme applications under a national agreement	

Grants	Heritage at Risk
	Project development
	Project management
	Use of materials & repairs to historic buildings
	Condition assessment
Develop, fund, fundraise, promote and implement partnership regeneration schemes, including with local and regional development agencies, private sector etc	

Administer grants for the repair, maintenance and enhancement of heritage assets	
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Promote, seek and administer external funding for the historic environment e.g. ERDF, Heritage Lottery Fund	
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Appendix 3

Local Authority post job titles

Local Authority post job titles	Number of posts
Building Conservation Officer	3
Building Manager	1
Conservation & Design Assistant	1
Conservation and Design Officer	1
Conservation Architect	1
Conservation Officer	10
Consultant	1
Design & Conservation Officer	5
Development Management Officer	1
Heritage Support & War Memorials Officer	1
Historic Buildings Officer	1
Historic Buildings Senior Practitioner	1
Historic Environment Officer	1
Information Officer	1
Manager	1
Planning Development Team Leader	1
Principal Architect	1
Principal Conservation and Design Officer	2
Principal Conservation Officer	2
Principal Sustainable Development Officer	1
Senior Building Conservation Officer	2
Senior Conservation & Design Officer	3
Senior Conservation Officer	3
Senior Design and Conservation Officer	1
Senior Historic Environment Consultant	1
Senior Planning Officer (Conservation)	3
Senior Urban Design and Conservation Officer	1

Strategic Conservation Officer	1
THI Project Manager	1