Historic England

What should you expect to find in conservation reports?

During conservation projects, various documents may be commissioned from conservators at different stages. The two main types are: the general condition assessment with conservation proposals (written in anticipation of a conservation project); and the conservation report (recording any conservation interventions carried out).

Proposals and reports present the results of one or all of the following: condition survey, treatment testing, environmental assessments, and the final record of remedial treatments or preventive measures carried out. All conservation projects require some form of visual recording to illustrate these results. 'Documentation' refers to any form of annotated recording that helps to explain these to the reader: whether using historic images, drawings or photography. In image captions of photographs, plans, charts, tables, and graphic documentation, it is standard practice to provide the date of the work and image credit.

Good communication between the conservator and the client (and other building specialists) is essential from the earliest stages of the project. The conservator is expected to review documents (published and unpublished), photographs, anecdotal evidence, and observations. This will inform any assessment and the final conservation document; it is good practice to refer to key material using clear citations to the sources used.

Typically, conservation reports are expected to follow a standard structure. A description of what to expect in each section is outlined in this document.

1 Summary

A synopsis of works carried out: for conservation proposals this would include the recommended conservation measures, with an indication of their relative priority; and in the case of conservation reports, highlights of the survey findings, treatments, and main recommendations for future maintenance.

2 Introduction

Sets the context of the project, identifying the aims and objectives agreed with the client (the 'brief').

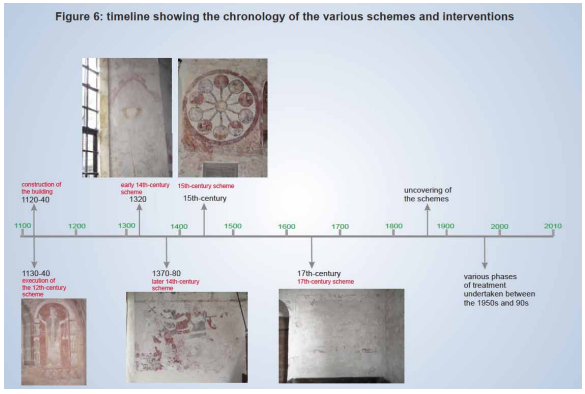
A list of those involved in the project, and their role, may be included, eg. the building owner, architect, surveyor or engineer, the project manager, the conservation team and any specialist consultants.

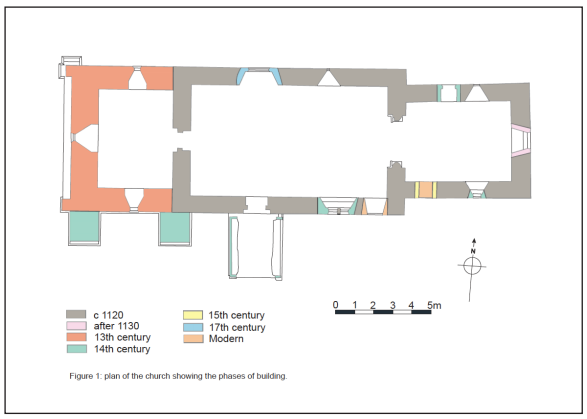
Commissioning a Conservator

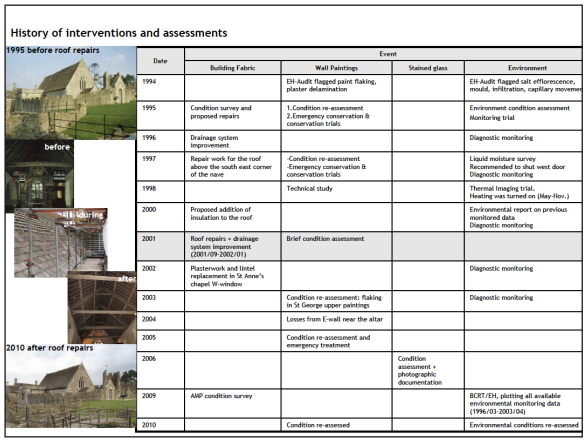
Conservation documents are an essential component of any conservation project; they may be required for applications for Faculties or Listed Building Consent. Historic England recommends the use of accredited conservators who have obtained professional recognition through the Professional Accreditation of Conservator-Restorers (PACR) system. Within the United Kingdom, this scheme is operated through the Institute of Conservation (ICON). It is essential to use a conservator with the relevant specialism and experience.

3 Background history and description

A general description of the architectural feature, and information on its historical importance, as well as a list of known previous conservation treatments.







Top: The use of a visual timeline can be a very useful way to explain the history of a site. (© Paine & Stewart)
Middle: A plan of the site can help clarify different building phases. The architect responsible for the project can often provide access to existing graphic documents, as well as information on the building's history. (© Paine & Stewart)
Bottom: Tables can illustrate the history of conservation interventions and investigations made in the past, and help highlight the relationship between condition history and key events. (© Conservation of Wall Painting Department, Courtauld Institute of Art)

3.1 Site

A description of the site, including the location, type of building, date of construction, phases of change or alteration, and significance (including Listed Building status). This includes a building and site plan, with locations clearly marked.

This may include a summary of the historical use of the building – particularly periods of disuse, neglect or catastrophic events – often most clearly presented in tables or charts that highlight key events.

3.2 Architectural feature

A description and history of the architectural feature, clarifying its extent and significance. The decorative pattern or iconography, if any, are described against comparative material to place artworks within a wider historical context.

Where there are multiple rooms or complex schemes of different dates, the works are divided into their relevant groups (by type, date, material, location or subject), and their locations made clear, using photographs, existing plans, or sketches to pinpoint particular areas.

3.3 Conservation history

The conservation history is included to make an informed assessment of condition. This may include:

- dates of previous interventions and their aims
- the conservators or other persons involved
- the materials employed and the areas treated
- any references to historic documentation or sources

In the absence of records, the conservator describes, so far as possible, any previous treatment and the materials used.

4 Technical examination

This may be based on the conservator's own observations and experience, or, in certain cases, it may be necessary to investigate further to establish definitively the original technique, construction method, deterioration products, and later added materials: all essential information to plan conservation.

Specific technical analysis may require highly specialised procedures undertaken by a trained professional. The report needs to make clear who has carried out the analysis, and who has interpreted it, and to present:

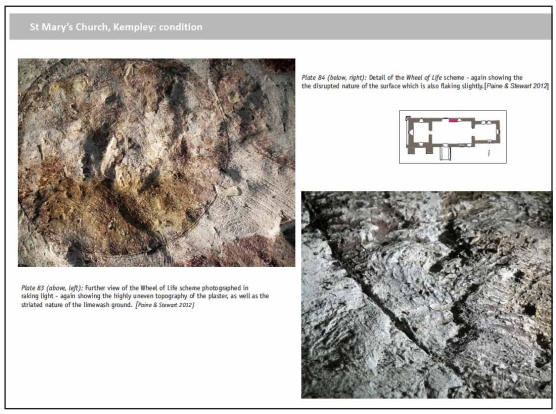
- the strategy for sampling and its aims
- the individual sample areas and method of sampling
- the analytical equipment and methods
- a list of findings and interpretation

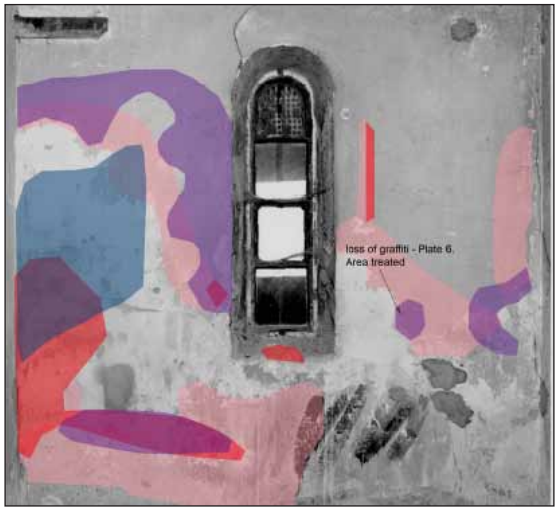
Evidence regarding original techniques and materials may include documentary material (original archive accounts, for example), comparable works, or direct visible evidence.

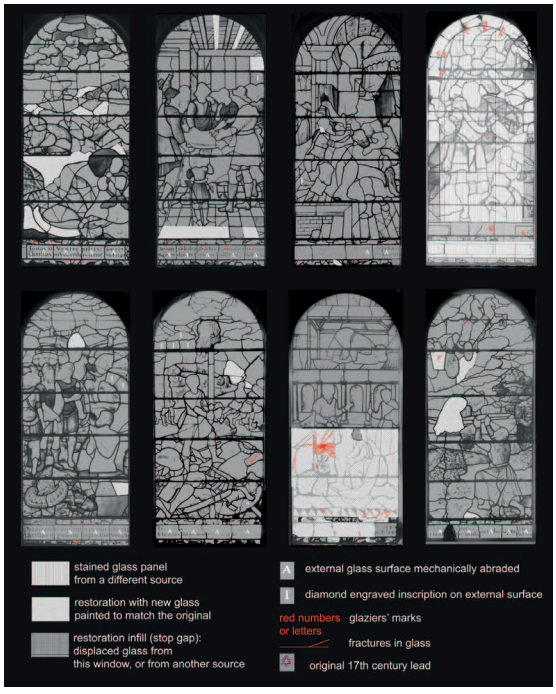
Any non-original materials, such as 'preservative' coatings, salt efflorescence or alteration products of original materials, should be identified, if possible, and their location recorded. Analysis may be necessary to identify some materials, and will inform any future conservation strategy.

Left: Historic features such as metal railings may have multiple layers of paint from repeated phases of redecoration. Paint analysis can help identify and date the various paint layers, and inform conservation options. (© Historic England)

Right: Salt efflorescence can disrupt and damage the surface of stone. Analysis can identify the type of salt and correlate it to original or added materials, which can aid in forming a conservation strategy. There are many methods of salt reduction or removal; however, addressing the environmental conditions may be all that is needed to reduce the occurrence of efflorescence. (© Tobit Curteis Associates)







5 Condition recording

Assessing condition (the condition survey) underpins conservation proposals and reports. It should look at:

- **the building** - drainage, structural movement, or the physical layout of the building should all be considered as part of the assessment of the structural envelope

- **the architectural feature** - for example, recording the condition of a wall painting, window, flooring, etc.

Graphic documentation is effective in showing the type and distribution of deterioration phenomena and of the treatments carried out.

Condition surveys can identify general patterns of deterioration, or record in detail specific instances of damage or decay, as well as highlight any areas of risk or concern.

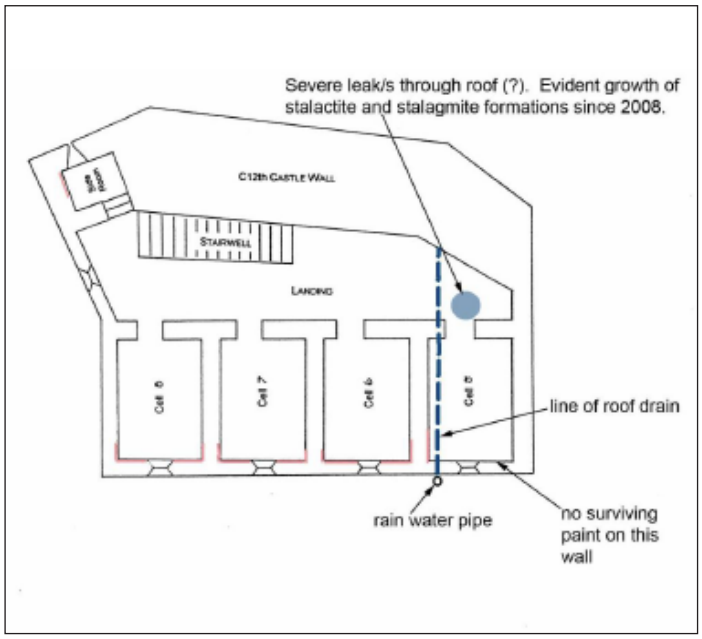
Deterioration phenomena may include: for example, flaking, spalling, delamination, powdering, cracking, visible salts, encrustations or accretions. Sometimes a 'visual glossary' is included: small photographs of characteristic areas representing each of the observed deterioration phenomena.

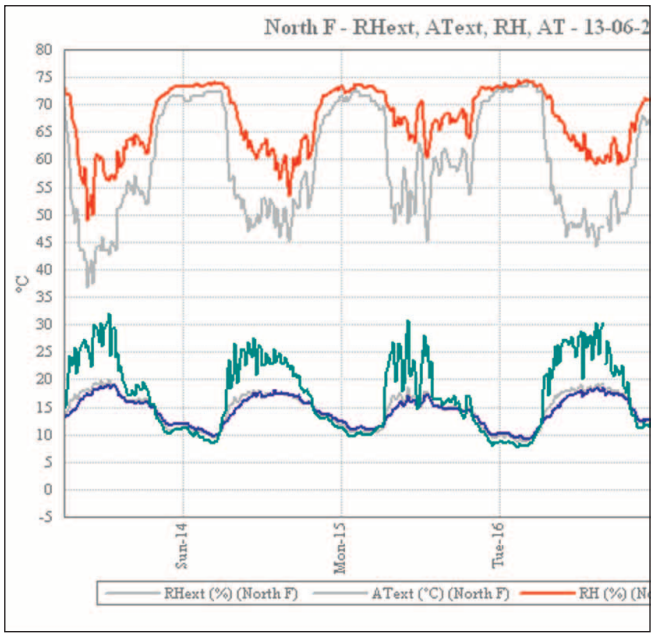
One of the simplest ways of presenting the results of condition surveys is to use graphic overlays on photographs or annotated drawings.

Top: Condition can be made clear using different forms of light (here, a wall painting in normal and raking light). (© Paine & Stewart)
Upper middle: Carrying out a condition survey of painted plaster using annotated photographs.(© Historic England)
Lower middle: Coloured overlays used on black and white photographs to map areas of damage and deterioration. (© Granville & Burbidge)
Bottom: Condition survey of a stained glass window, showing replaced areas of glass, and various deterioration phenomena. (© Léonie Seliger)

6 Assessment

The interpretation of information collected over the course of the study, together with a prognosis of the factors responsible for current condition, are included here. In areas of active decay, the potential deterioration processes and their sources are discussed and prioritised.



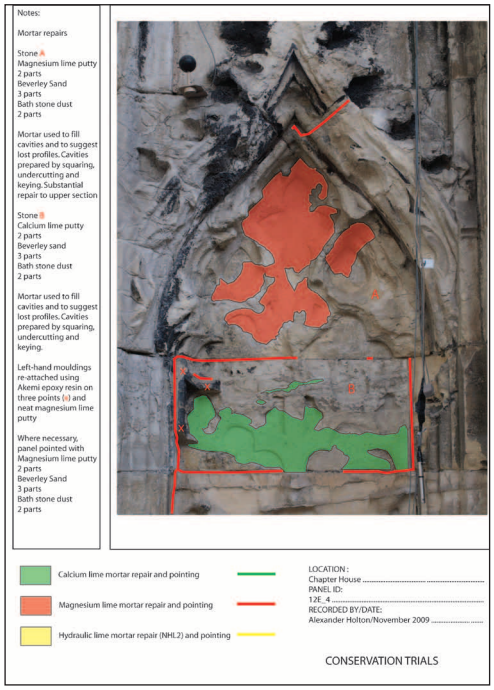


Left: The locations of drains and gutters is directly related to the deterioration of surfaces in this marked-up plan. (© Conservation of Wall Painting Department, Courtauld Institute of Art)
Right: Environmental monitoring data is plotted on graphs so that conditions over the course of a period of time can be analysed and the effect of significant events assessed. (© Tobit Curteis Associates)

Environmental assessment

The general environmental conditions must be assessed, and building services (drainage, heating and ventilation) located. Environmental investigations (such as liquid moisture surveys or monitoring) are presented including data and its interpretation. When the assessment is based on a single site visit, the weather conditions during examination are described.

Environmental monitoring – where the environmental conditions are recorded over an extended period of time – may be recommended before treatment. This, and other detailed environmental surveys, are specialist activities used when causes of deterioration are not obvious.



Top: Detail of a record of treatment trials made at Howden Minster, Yorkshire, to compare the behaviour of mortars made with different binders. (© Historic England)
Bottom: A damaged wrought iron gate before repair. A balanced treatment approach considers the needs of functionality whilst retaining the patina of age. (© Rupert Harris Conservation)

7 Conservation interventions

Conservation interventions are divided into the following types:

- **preventive measures** – addressing triggers of deterioration; for example, developing site maintenance and management strategies, restricting access
- **passive measures** – mitigating the activation of deterioration, e.g. altering the environmental conditions using conservation heating
- **remedial measures** – implementing conservation treatments to remedy specific problems
- **aesthetic measures** – improving visual appearance, e.g. cleaning, reintegration, replacement of missing elements, decoration of adjacent surfaces, lighting and interpretation

Conservation interventions can be phased over time.

Treatment trials

Any treatment trials are presented, including: testing methods and materials and their selection criteria; the areas tested with before-and-after photographic documentation; results and recommendations.

Recording the intervention

All interventions are documented with details of the methods, materials, and any health-and-safety issues associated with them. This can be recorded graphically or photographically to demonstrate each stage, 'before', 'during', and 'after'.

Presentation

The presentation entails balancing significance, context, condition, access, and funds available.

- alterations to the site including lighting, interior redecoration, or the installation of interpretative materials, all have to be assessed in relation to conservation needs
- the level of cleaning and the reintegration of missing areas are decisions that need to be agreed at the outset of the conservation project

Any presentation interventions and their rationale are recorded as part of the conservation report.

8 Conclusions and recommendations

A conservation proposal outlines possible options for conservation, including priorities and appropriate timescales.

A conservation report includes maintenance advice for the future, listed in order of priority, and outlined with an appropriate timescale.

9 Logistical details

A conservation proposal or tender should include the following information.

- the time required for the works, with an estimated date of completion
- the cost of the works (including conservators' fees, conservation materials, accommodation, travel, documentation materials, photography, research, analysis)
- phases of work
- access requirements; scaffolding may be required for inspection and/or treatment
- terms of payment

10 Where to Get Advice

Icon
The Institute of Conservation
Unit 3.G.2, The Leathermarket
Weston Street
London SE1 3ER
Website: icon.org.uk
For their register of accredited conservators:
www.conservationregister.com

ChurchCare
Cathedral and Church Buildings Division
Church House, 27 Great Smith Street
London SW1P 3AZ
Website: www.churchcare.co.uk
For their guidelines on conservation reports:
www.churchcare.co.uk/churches/art-artefacts-conservation/conservation-reports