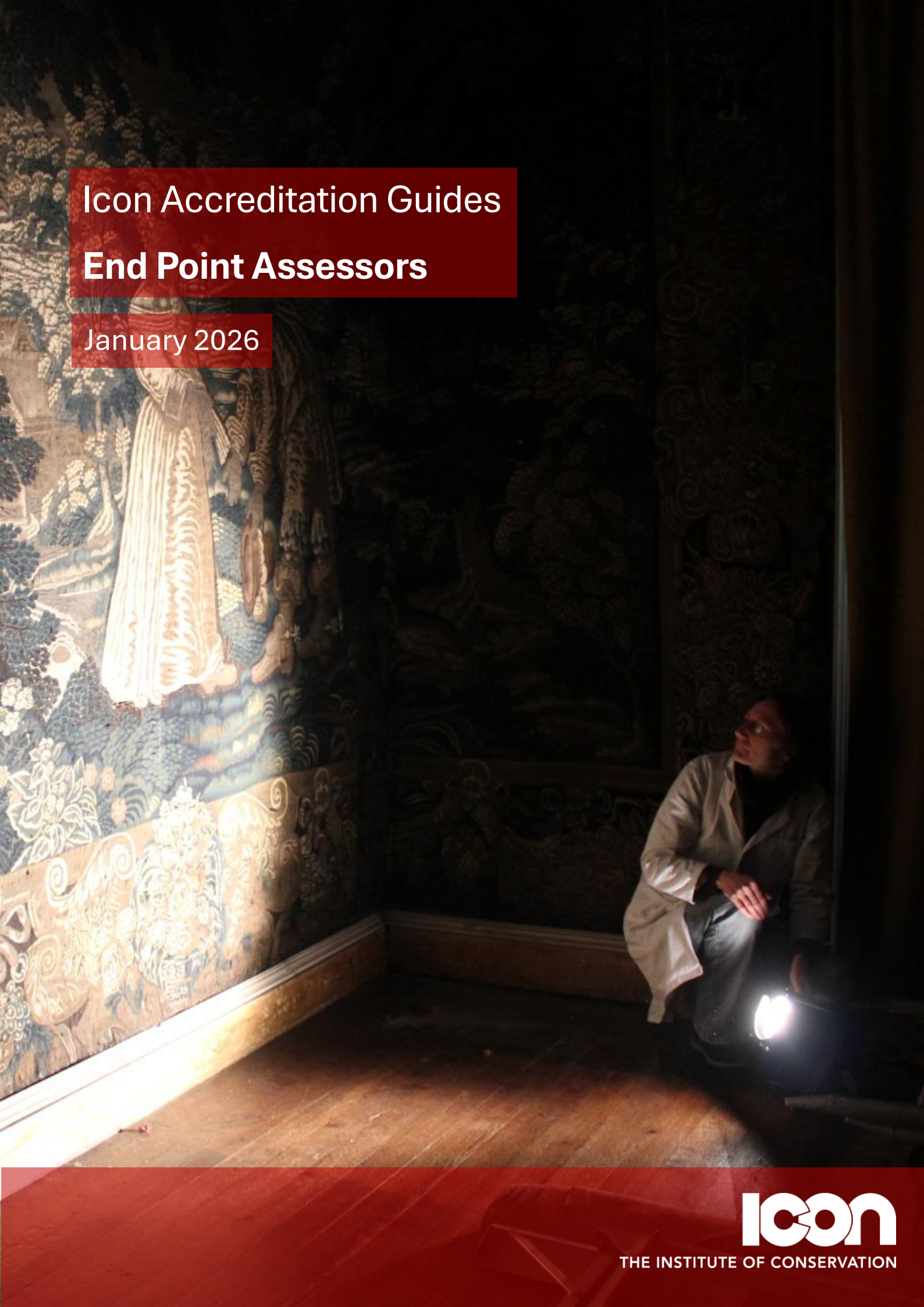




Icon Accreditation Guides

End Point Assessors

January 2026

Icon

THE INSTITUTE OF CONSERVATION

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INTRODUCTION

Thank you for agreeing to become an Icon End Point Assessor (EPA) for ACR assessments. We are very glad to have you on board!

The role of End-Point Assessor carries a lot of responsibility. EPA's lead the assessment process. They ensure that all criteria are addressed, they make assessment decisions in conjunction with their Specialist Advisor and report on results clearly and accurately. All Icon EPAs have (at least) a level-3 qualification in End-Point Assessment and experience in supporting the development of others.

EPAs do not have the same conservation specialism as the candidate, therefore they need to work closely with the Specialist Advisor to get advice on all matters relating to the specific conservation specialism – for instance depth of candidate's material knowledge, appropriateness of treatments etc.

EPAs work as freelance contractors for Icon. Icon will pay you a fee of £250 for your first assessment and £550 for every assessment thereafter. (You will need to invoice Icon for your fee after the submission of each assessment report.)

ESSENTIALS FOR AN END-POINT ASSESSOR

- Must be an Accredited member of Icon
- Detailed knowledge of the Icon Professional Standards and how these relate to the role of a conservator-restorer
- To hold, or be willing to undertake an End-Point Assessment qualification (e.g., A1, Level 3 Award in End-Point Assessment, etc.)
- Evidence of commitment to maintaining CPD
- Ability to understand and respond to candidate's individual needs and circumstances.
- An understanding of the cultural heritage conservation profession, including an awareness of the differing work environments and a broad understanding of practice within a range of material specialisms.
- Ability to measure candidate's performance accurately, using assessment criteria
- Ability to undertake role free from bias
- Ability to work collaboratively with others
- Ability to assess and report risks
- Ability to meet deadlines.

MAIN DUTIES AND RESPONSIBILITIES

1. Assess the performance of candidates against the Icon Professional Standards using the Icon ACR assessment criteria. Include grading to ensure overall standards are maintained.
2. Assess candidates using VARCS principles: (Valid, Authentic, Reliable, Current and Sufficient.)
3. Produce clear and accurate written records of assessments that state explicitly how the candidate has met the criteria.

4. Report all risks and issues encountered during the end-point assessment to the Accreditation Manager, including any suspected malpractice/maladministration.
5. Support the Icon Accreditation Manager and Icon Moderation Committee with any appeals from candidates regarding assessment decisions.
6. Liaise effectively with candidates, Specialist Advisors and the Icon Accreditation Manager in relation to any practical arrangements for assessment. This may include, but is not limited to; the provision / review of evidence, the provision of reasonable adjustments, arrangements for in person assessment visit, arrangements for online assessment meetings etc.
7. Raise any conflicts of interest, including those that may impact the independence of the assessment.
8. Take part in regular training, standardisation and performance review activities, as required, for the role of Assessor for Icon accreditation.
9. Maintain and provide evidence of ongoing, relevant Continuous Professional Development (CPD)
10. Conduct oneself professionally in all dealings with assessment stakeholders including, but not limited to, candidates, Specialist Advisors, Icon Skills Team and the Icon Moderation Committee.
11. When visiting candidates in their place of work, follow all workplace protocols including, but not limited to, health and safety and workplace confidentiality.

RECENT CHANGES TO THE ASSESSMENT PROCESS

The current assessment process is different to the one you experienced when you were accredited.

Change was necessary because the old system proved problematic for many candidates and, as a result, the numbers coming forward for accreditation were dwindling. A 2022 survey of Associate, Pathway and recently Accredited Members indicated a number of weaknesses with the old system:

- The application form was lengthy and complicated. As such, candidates often spent as long on completing the application form as they did on their assessment. Since the initial application didn't actually form part of the materials assessed, this felt like a wasted effort on the part of the candidate.
- The assessment timelines were very inflexible, and this made it difficult for candidates to manage assessment around other commitments – such as work and family.
- The process didn't adequately support candidates with disabilities and chronic health conditions.
- Although candidates understood they were being assessed on the standards, at times candidates still found it challenging to understand *exactly* what they needed to do to meet each standard.
- The assessment discussion itself was arduous and exhausting for all parties. And could be challenging for assessors to assess 37 sub- standards in one sitting.

THE NEW SYSTEM

To address these issues Icon has implemented the following changes to the system.

- A shorter application form that relies less on long project summaries.
- More flexible timelines. There are now 3 application deadlines each year, instead of two, so candidates don't have to wait as long before submitting their application.
- The assessment process itself is now split into 2 phases:
 1. an e-portfolio stage, where candidates provide project summaries and supporting documentary evidence, such as conservation records.
 2. A half-day assessment discussion to discuss some areas of their practice in greater depth.

Once candidates have been enrolled onto the e-portfolio software system, they have up to 12 months to complete both stages of the assessment. Candidates can work on this at their own pace; they may wish to complete everything within a couple of months or take the entire year. This flexibility enables candidates to balance their assessment workloads with other commitments.

- There is a Fair Access Policy that outlines a process for supporting candidates with disabilities and chronic / long term health conditions. Candidates can apply for reasonable adjustments to ensure they are not disadvantaged in the assessment process.

- A new ACR Assessment Criteria has been produced and shared with candidates and assessors. This document explains what candidates are required to demonstrate to pass each standard.
- As candidates will have already shared a great deal of contextual information with assessors in their e-portfolio, the final assessment discussion does not need to be as lengthy as under the old system. The assessment discussion is now approximately 3-3.5 hours in length.

ASSESSMENT PROCESS – WHO DOES WHAT AND WHEN?

	Candidate	Icon Team	End-Point Assessor	Specialist Advisor (SA)	Moderators
Portfolio Creation	Candidate writes project summaries, attaches documentary evidence and links to standards.	Available to support candidate as required			
Portfolio submission	Candidate emails Icon when complete	Icon does a portfolio 'sense-check'. Icon appoints assessors and provides reasonable adjustment information, if relevant.	EPA asked if they are available to assess. Please give response ASAP.	SA asked if they are available to assess. Please give response ASAP.	
Portfolio Review	May need to make some further amendments at request of assessors	Available to support candidate and assessors as required	Reads e-portfolio. Using assessment criteria, identifies areas of strength and areas requiring further discussion. Meets with SA to share views. Agree feedback to candidate. Contacts candidate with feedback. May ask candidate to make further amendments before discussion. Also highlights areas for discussion. If serious concerns about candidate, contact Icon	Reads e-portfolio. Using assessment criteria, identifies areas of strength and areas requiring further discussion. Meets with EPA to share views. Agree feedback to candidate.	

Pre-discussion	Candidate makes minor amendments to portfolio if required. Candidate works with mentor to prepare for discussion.	Agree discussion format and set up Zoom access for the discussion, if required.	Contacts SA and candidate to agree discussion date and preferred format of discussion with all parties. Organises access to Icon Zoom account if required. If face-to-face discussion is necessary, discuss with Icon	Liaises with EPA to agree discussion date and preferred format	
Assessment Discussion	Candidate gives brief intro to projects and then responds to questioning. May present an object or a workspace if appropriate		EPA and SA question the candidate. EPA responsible for ensuring all areas of questioning required are covered.	EPA and SA question candidate. SA leads on questions relating to material knowledge / treatment methods and looks at quality of work completed.	
Post-discussion	Provides any follow up evidence within a few days.	Icon available to support candidate and assessors as required.	EPA can ask for any follow up evidence within a few days, if required. EPA and SA meet to discuss candidate performance and agree results. EPA takes guidance on specialist terminology for report from SA if necessary.	EPA and SA meet to discuss candidate performance and agree results. SA gives guidance on subject-specific terminology for report where required.	
Report-writing		Icon available to support assessors as required.	EPA writes report and shares draft with SA to check both parties are in agreement	SA reads draft report and gives feedback to EPA.	

Report Submission		Icon sends claim form to SA and processes returns	Report submitted on OneFile. Sends invoice to Icon.	SA completes claim form and returns to Icon.	
Moderation		3 times a year, Icon assigns reports to moderators. Collates feedback from Moderators. Issues result to candidate.	Responds to any questions from moderators about report.	Rarely may be called upon by EPA to provide further information for an assessment decision.	Check that the process has been conducted fairly. Check there is clear rationale to support the assessment decisions made by EPA and SA. Where clear rationale is not present, clarify details with EPA. Uphold result or reject assessment report.

BEFORE AN ASSESSMENT

RECEIVING AN ASSESSMENT REQUEST

Assessments can crop up at any point in the year. Eventually we aim to provide End-Point Assessors with approximately 5 assessments per annum. However, initially the number is likely to be smaller as we transition candidates across from the old to the new assessment system.

Icon will approach End-Point Assessors directly, by phone and/or email, to enquire if they have the capacity to participate in an assessment. To avoid delays in assigning assessors to a candidate, please respond to the request as soon as possible. Although you receive a fee for your time and trouble, we appreciate that most EPAs have other professional commitments and may occasionally need to decline a request.

Once an EPA has accepted an assessment, Icon will source a Specialist Advisor to work in partnership with them. **Once the Specialist Advisor is confirmed, the EPA takes over the management of the assessment and initiates and maintains contact with all parties. This continues until such time as the assessment is concluded, and the report is submitted. However, the Icon Skills Team will be available to support you during this process should you have any questions or concerns.**

CONFLICT OF INTEREST

To ensure fairness and objectivity in the assessment process, it is important that there are no conflicts of interest between candidates and their assessors. Icon classes a conflict of interest as:

- A personal relationship, such as a family member or close friend.
- A current or former employer / employee / manager / co-worker from within the last 5 years.
- A direct competitor
- Any other circumstance where the assessors may benefit from the outcome of an assessment.

When accepting an assessment, End-Point Assessors and Specialist Advisors must confirm with Icon, at the start of the process, that they have no conflict of interest with the candidate.

Icon's Accreditation Conflict of Interest Policy can be found here: [Icon Accreditation Conflict of Interest Policy](#)

TIMELINES

If you accept the assessment, you will be given access to the candidate's OneFile e-portfolio so you can read project summaries and view associated paperwork, such as treatment records. We request you review this paperwork within 1 month of gaining e-portfolio access, unless otherwise agreed.

POLICIES AND PROCEDURES

Whilst we do not expect you to know these policies by heart, it is a good idea to familiarise yourself with them prior to undertaking an assessment. Policies do not just apply to candidates

but to all stakeholders in the accreditation process including End-Point Assessors, Specialist Advisors, Mentors and Icon staff.

APPEALS AND COMPLAINTS POLICY

This policy details Icon's approach towards dealing with complaints and managing the appeals process to ensure that candidates receive a fair and objective assessment. This policy relates appeals and complaints with respect of:

- the results of assessments,
- decisions regarding Reasonable Adjustments and Special Consideration, and
- decisions relating to any action to be taken against a candidate following an
- investigation into malpractice or maladministration.

CONFLICT OF INTEREST POLICY

This policy details Icon's approach to identifying and mitigating the risks of conflicts of interest in undertaking Icon Accreditation assessments.

FAIR ACCESS POLICY

Icon must have in place the necessary systems and procedures to allow for the provision of access arrangements, including reasonable adjustments and special considerations. These should reflect the needs of candidates, whilst also ensuring that all assessments are valid, reliable, and consistent. This document relates to the following Policies: Appeals and Complaints Policy

GENERATIVE ARTIFICIAL INTELLIGENCE STATEMENT

Sets out Icon's position on the use of generative AI in assessments, including where it is allowed and where it is not permitted.

MALPRACTICE AND MALADMINISTRATION POLICY

This policy details Icon's approach towards identifying and dealing with cases of malpractice and maladministration. It outlines the procedures for handling suspected malpractice (such as plagiarism) or maladministration and explains the responsibilities of all parties involved.

QUALITY ASSURANCE POLICY

The Institute of Conservation (Icon) recognises the vital importance of ensuring that all assessments it undertakes as part of the delivery of Icon Accreditation are valid, fair, objective and meet the high standards of the conservation profession.

REASONABLE ADJUSTMENTS

A disability, long-term health condition or neurodiverse learning condition (such as dyslexia) should not be a barrier to assessment. Candidates are being assessed on their ability to meet the accreditation standards, not on their ability to complete a form or deliver a presentation.

If a candidate has a disability or health condition that might entitle them to reasonable adjustments, they are encouraged to discuss this with Icon at the point of starting the e-portfolio. The Icon Fair Access policy provides information on requesting reasonable

adjustments. This policy can be found in the resources section of OneFile and can also be found at the Icon website.

If a candidate has declared eligibility for reasonable adjustments prior to assessment commencing, Icon will have agreed what reasonable adjustments must be in place and will confirm arrangements with End Point Assessor and Specialist Advisor at the start of the assessment process. To ensure fairness, it is important that the End-Point Assessor and Specialist Advisor follow any instructions given by Icon regarding reasonable adjustments.

If eligibility for reasonable adjustments is only declared once assessment is underway, the End Point Assessor should contact Icon for guidance before continuing.

WHAT AM I LOOKING FOR WHEN ASSESSING?

To be successful at assessment, candidates need to be deemed proficient in each of the 37 sub-standards that make up the Icon Professional Standards.

ACR ASSESSMENT CRITERIA

When assessing you should refer to the Icon ACR Assessment Criteria. You will find the Assessment Criteria in the appendix of this document. It is also available in the 'Resources' section on the OneFile e-portfolio system. The purpose of the Assessment Criteria is to ensure everyone understands exactly what candidates must demonstrate for each of the 37 sub-standards. Using this common framework, we can ensure greater consistency in ACR assessments. The Assessment Criteria document lists each sub-standard, the pass criteria for that sub-standard and suggestions for possible evidence.

The document is written to be applicable across all conservation specialisms and different contexts. Every assessment / conservation project is different – so not everything written against a specific assessment criterion will be applicable on every occasion. Assessors should use common sense when applying this document, using their judgement in each case to decide what is relevant to each candidate, project and/or context.

Standard 5: Continuing Professional Development			
Standard	Description	Pass Criteria	Suggestions for Evidence
5.1	Keep yourself informed on changes in the profession as well as broader developments relevant to your work context.	Candidates should take active responsibility for their continuing professional development (CPD). They should show understanding of, and engagement with, emerging developments and research. They should be able to identify areas where further exploration is relevant to developing their practice and expertise. This includes maintaining familiarity and, where appropriate, contact with relevant bodies in the conservation / restoration field and beyond as relevant to their area of practice.	Evidence may include, but is not limited to: • Evidence of attendance at, and learning from, professional development events such as lectures, conferences, training courses etc. • Evidence of engagement with peers across the profession, through networking events, networking groups, professional forums, individual discussion, work shadowing etc. • Evidence of academic engagement – reading papers, journals, books etc. • Performance management records • Testimonials from relevant stakeholders • Completion of CPD tasks set within the e-portfolio. • Discussion with assessors

COMPLEX PROJECTS AND AUTONOMOUS DECISIONS

To be able to meet the assessment criteria, candidates generally need to present *complex* conservation projects at their assessment. Icon defines complex conservation problems as those which:

- Require choices between options that lead to significantly different outcomes
- Present dilemma and value-conflicts or require significant value-judgements

- Present substantial technical problems, for instance in relation to unstable or degraded materials or the level of risk associated with treatments or strategies
- Require a deep level of practical understanding to be applied to a situation
- Require the marshalling and management of a wide range of resources.

To be 'complex' a project should have one or more of these factors present to a high degree.

When working on these complex projects, candidates should show that they have the specialist knowledge necessary to make **effective, autonomous** decisions, only needing to draw upon the expertise of others when they are working beyond the boundaries of their knowledge.

VARCS

VARCS is an acronym used in assessing. When reviewing evidence, you should be asking yourself if it is 'VARCS' compliant. This stands for:

Valid	Does the evidence provided actually relate to the assessment criteria? e.g. If they are trying to demonstrate the quality of their hand-skills, is there visual evidence for you to view either through photographs, video or live presentation of an object? If they are trying to demonstrate adherence to health and safety procedures, is there relevant documentation such as risk assessments and COSHH paperwork etc? Occasionally, you may feel the candidate has misunderstood the nature of an assessment criterion. If so, discuss this with the End-Point Assessor.
Authentic	To the best of your knowledge, does the evidence appear to be the candidate's own work? If they are drawing upon the work of others, such as colleagues or published work, is this properly acknowledged / cited? (We just ask for your best judgement, based on what you read, see, discuss and observe. We do not expect you to be clairvoyant!)
Reliable	Is the portfolio an accurate reflection of the candidate's standard of work. For instance, if they are providing 3 sets of treatment records, are they all of similar quality or is the quality inconsistent?
Current	Is the knowledge up to date? (There's a caveat here, candidates may draw on older projects, particularly if their projects are large in scope and take many months to complete. <u>However</u>, if new knowledge has emerged since the project was originally completed, and best practice approaches have changed over time, the candidate must show awareness of this and discuss how they might undertake the project differently today. <u>Basically, the projects can be old, but the specialist knowledge must be current.</u>)
Sufficient	Is there enough evidence to make an assessment decision? This is hard to give definitive guidance on what 'sufficient' is, as the content and quality of every portfolio is different. Some standards required the candidate to demonstrate a particular standard of work - (e.g. in most standards 1-3, where you might expect to see condition assessments, treatment records etc. Or standards covering issues such as

health and safety.) For these standards we are looking for consistency of approach and consequently we recommend candidates evidence each standard 2-3 times.

Other standards may be more knowledge-based or refer to more minor aspects of a conservator's day to day role. For instance, sub-standards regarding environmental sustainability, or sharing conservation knowledge with expert and lay audiences. For these standards 1-2 examples may be sufficient.

Much depends on the quality of evidence and how well it suits the standard. This is where we must trust your judgement. Use the assessment criteria for guidance and ask yourself 'if this person was working for me, would I feel confident in their ability?'

HOLISTIC ASSESSMENT

By the end of both stages of the assessment, candidates should have demonstrated that they have met all of the criteria somewhere.

Candidates do not necessarily have to meet each criterion in both assessment and discussion. (You will find some assessment criteria lend themselves more naturally to discussion, whilst others are proved sufficiently through written evidence.)

Nor do candidates have to meet each criterion in every project. Perfect projects that meet all 37 criteria rarely exist!

Assessors need to be clear where a candidate has met a criterion (e.g. which project) and be able to give a rationale for the final assessment decision.

If, during the assessment process, you are in doubt about how to interpret the Assessment Criteria and/or relate it to a candidate's evidence, the Icon Skills Team are happy to provide support.

END-POINT ASSESSOR OR SPECIALIST ADVISOR?

Although you are working in a team with your Specialist Advisor, the workload is not split along 50/50 lines and the pay structure reflects this. As End-Point Assessor, you have the ultimate responsibility for ensuring all criteria are assessed and reported on, taking guidance from the Specialist Advisor where it is necessary to do so. The Specialist Advisor's role should focus on evaluating if the candidate has appropriate levels of specialist knowledge, makes appropriate decisions on options and strategies and carries out work to the expected level.

The level to which you need to rely on the opinion of your Specialist Advisor will vary by sub-standard. Whilst you will need to lean on them heavily for Standards 1-3, there may be other sub-standards where you do not need their input. For example, the evidence for meeting sub-standard 4.4 'Adhere to good business or internal practice in dealing with clients, colleagues and other stakeholders' is likely to be understood by all conservators, regardless of their area of expertise.

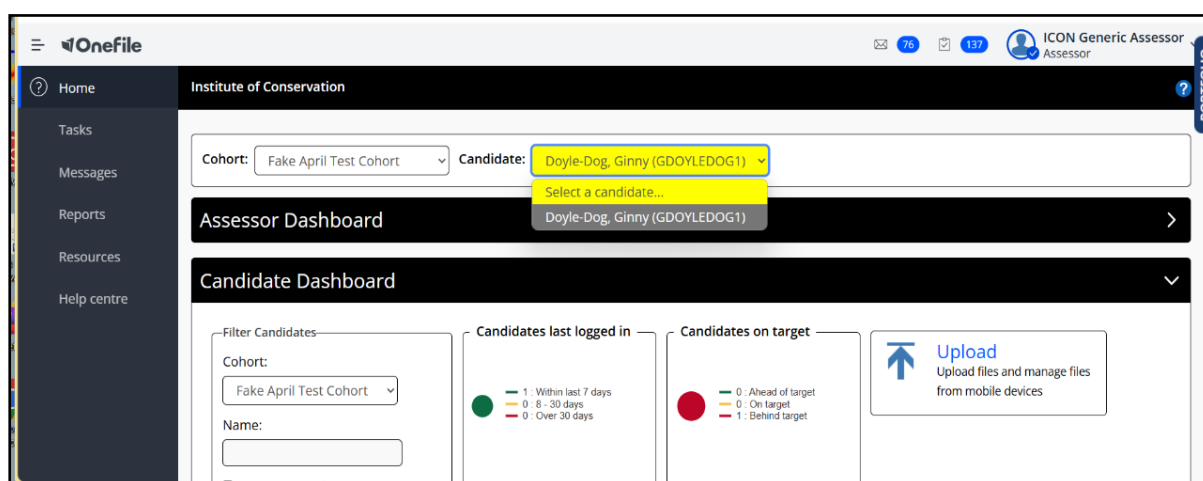
DURING THE ASSESSMENT: E-PORTFOLIO STAGE

ACCESSING THE E-PORTFOLIO ON ONEFILE

Candidates produce their e-portfolio using a software system called OneFile.

Once you have confirmed you are happy to participate in the assessment, Icon will set up a OneFile account for you. You will then receive an email from OneFile inviting you to set up a password. (The link in this email expires after 7 days. If you find the link has already expired by the time you get to it, contact Icon and we will get the OneFile system to send you a new link.)

When you log into OneFile you will see a screen like the one below. If you click inside the candidate box where it says, 'select a candidate', you will see any candidate(s) to whom you are assigned. Click on the correct name and scroll down the page where you will see their account highlighted in yellow.



Filter Candidates		Candidates last logged in		Candidates on target		Upload		
Cohort: Fake April Test Cohort		1: Within last 7 days 0: 8 - 30 days 0: Over 30 days		0: Ahead of target 0: On target 1: Behind target		Upload files and manage files from mobile devices		
Name:								
Show my candidates only								
Show archived candidates								
Records per page: 50						Showing 1 - 1 of 1 records		
1								
Candidate	Main Accreditation Framework	Progress (Target)%	Anticipated Completion Date	Target Deviation	Next Progress Review Date	Units Signed Off	Tasks	Portfolio Options
 Doyle-Dog, Ginny Episode Name: GDOYLEDOG1 Fake April Test Cohort Offline	Institute of Conservation, Professional Standards	Progress: 0% (Target: 100%)	25/10/2024	-100%	18/07/2023	0/6	0	Assessments Plans Gap Analysis

Once you have the candidate's information on the screen, you have two different ways of viewing their information, either organised by **project** or by **sub-standard**.

To view by **project**, do the following:

- 1) Click on the black button labelled 'Assessments', this will bring you to a page where all their projects are listed. See example below.

Onefile

Home / Ginny Doyle-Dog / Assessments

Assessments

Create Assessment Show: Pending

Date	Ref	Assessment Title	Method	Assessor Assessment Time (minutes)	Candidate Assessment Time (minutes)	Related Assessment Plan	Action Required By	Options
06/11/2024	PR27	Taxidermy squirrel	Project	0	0	None	Candidate	Edit
16/09/2024	PR26	Wattingham Engine	Project	0	0	None	Assessor	Edit
08/07/2024	PR25	presentation at icon 24 conference	Project	0	0	None	Candidate	Edit

Click on the link in the 'Assessment Title' column to view the project.

When viewing a project, you should be able to see the following information (see example screen shots below):

- A list of the standards they are trying to evidence in this project.
- Write-up giving contextual information about the project, why it was complex and the role they played.
- Relevant attached documentation.

Onefile

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ICON Generic Assessor

[01] Assessment of cultural heritage

[1] Assessment of cultural heritage

Assessment Criteria ☐ [1.1] - Understand the significance and context of the heritage to be assessed, along with any implications for potential conservation measures

[02] Conservation options and strategies

[2] Conservation options and strategies

Assessment Criteria ☐ [2.2] - Develop advice, recommendations or policies relating to the different options available ☐ [2.3] - Develop or negotiate a considered course of action for implementation

[04] Organisation and management

[4] Organisation and management

Assessment Criteria ☐ [4.1] - Organise and manage work to ensure that it is completed appropriately ☐ [4.2] - Ensure that your work practices and any you promote comply with applicable legal and contractual requirements ☐ [4.3] - Ensure that your work practices and the area for which you are responsible comply with relevant Health & Safety regulations and guidelines, minimising risk to yourself and others ☐ [4.4] - Adhere to good business or internal practice in dealing with clients, colleagues and other stakeholders

[05] Continuing professional development

Onefile

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ICON Generic Assessor

Annotation enabled: highlight text and click the annotate button to provide direct feedback or comments.

Latest submission by Ginny Doyle-Dog (Candidate) 16/09/2024 17:10

Industrial Project sample write up.

In 2022 the museum received Heritage Lottery Funding to restore the 1921 Wattingham Engine that had been acquired by the museum in 2019 and was in a poor state of repair. I wrote the original funding bid to the NLHF (standards 4.1, 5.1, 6.8. Doc A) and was Conservation Manager for this project, which commenced in November 2022 and was scheduled to last 18 months.

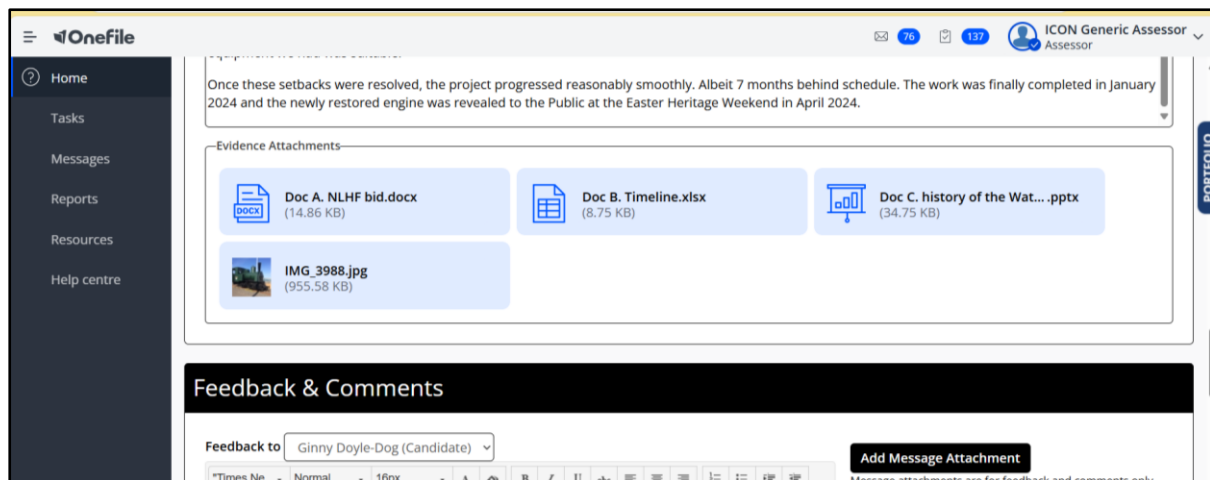
The Wattingham Engine was historically significant as it is one of the last surviving examples of a class A 2-2-0 locomotive from the Jon Smith and Sons Company, which went bankrupt in 1931 due to the impact of the Great Depression. The Wattingham Engine was also the first engine designed by the infamous 20th-century designer Walter Proctor, who later moved to London Transport and designed the, now iconic, 1933-stock Metropolitan line engine.

Most of the Jon Smith and Company Wattingham engines were in use on the London & Midland railway in the 1920s to 1940s. The number of working Wattingham engines dropped significantly during the 2nd World War following a series of bombing raids by the Luftwaffe which severely damaged engine sheds in the Birmingham and Coventry area. As such, this engine is a rare acquisition and the museum was keen not only to protect it, but to restore it to working order and display it as a key object in its vehicle collection. (Standards 1.1 and 6.11. Doc C)

Key responsibilities when managing this project were as follows:

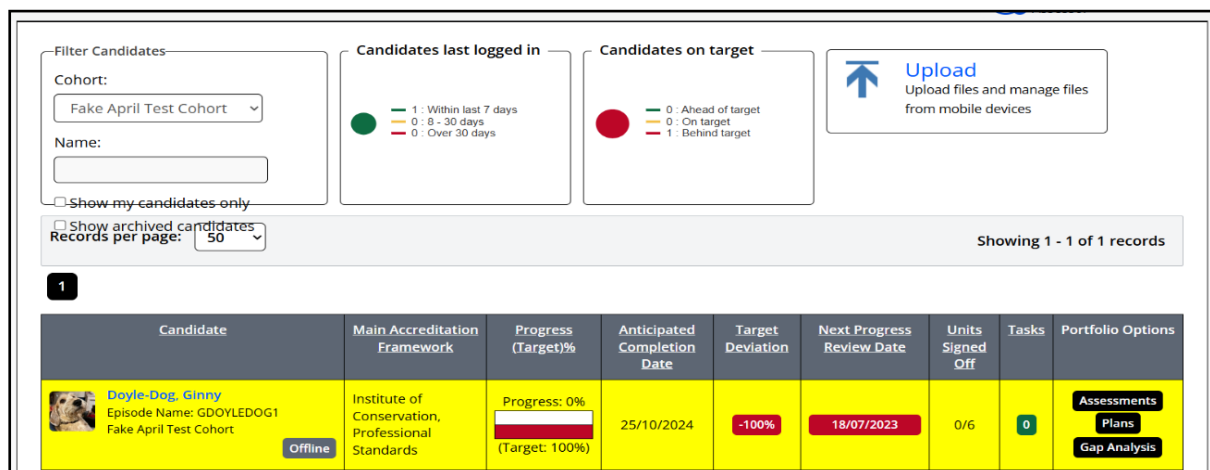
- Writing the original bid for funding with costings for each aspect of the project (Doc A)
- Recruitment of two interns to support the work of in-house conservation staff. (Doc H)

Save & Refresh Save & Quit Resubmit Cancel

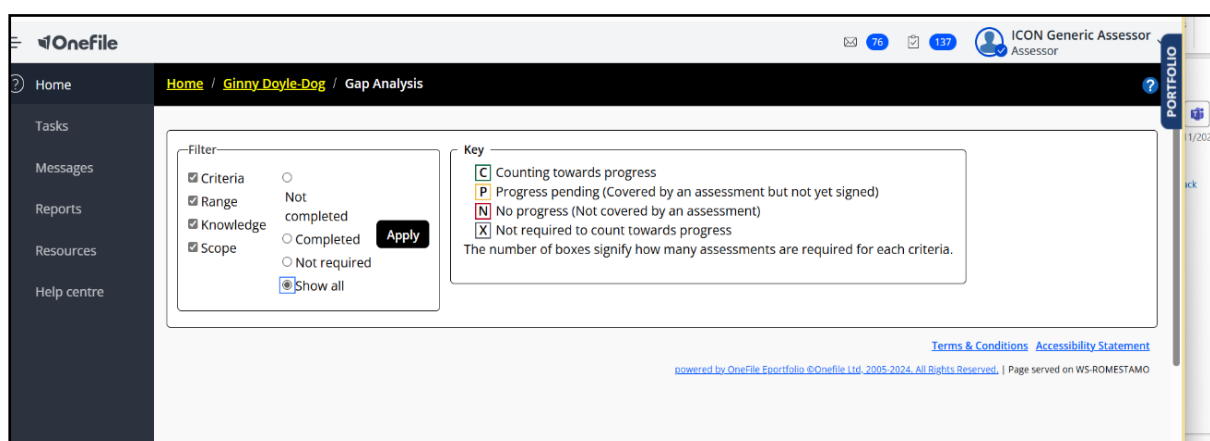


Important note: opening a file puts a copy in your downloads file on your machine. Do remember to delete it after viewing!

2) to view candidate's work by **sub-standard**, do the following.



Click the black button called 'gap analysis'. This will bring up the screen below.



In the filter section, click 'show all' and then click the black 'apply' button.

This will then take you to a screen that has drop down menus of all 6 areas of the Professional Standards

- Standard 1: Assessment of Cultural Heritage.
- Standard 2: Conservation Options and Strategies
- Standard 3: Conservation Measures
- Standard 4: Organisation and Management
- Standard 5: Continuing Professional Development
- Standard 6: Judgement and Ethics.

Click on the drop-down arrow on each standard to see a listing of the sub-standards. In the example below we are looking at the candidate's evidence for Standard 3. The candidate has got evidence listed against sub-standards 3.2 and 3.3 (the blue hyperlinks in the 'Supporting Evidence column.) However, there is no evidence listed for sub-standards 3.1, 3.4, 3.5 and 3.6.

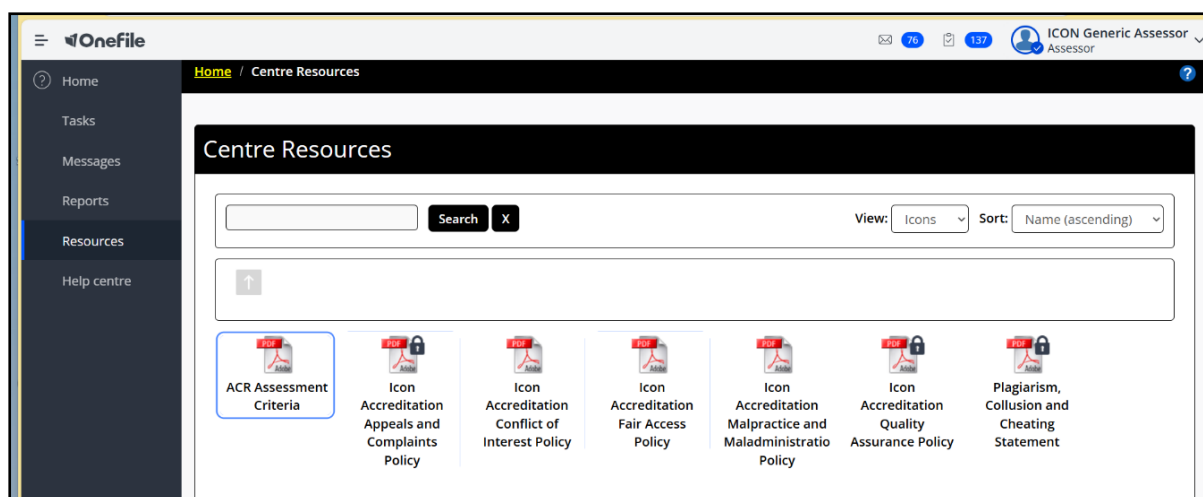
[03] Conservation measures (Progress 0% - Unit rules satisfied)				
Select criteria: All None				
[3] Conservation measures				
Select	Criteria		Supporting Evidence	Progress
☐	3.1	Communicate appropriate practice in the care, protection and treatment of cultural heritage		N
☐	3.2	Implement conservation measures	PR27	P
☐	3.3	Ensure that measures and advice follow recognised conservation standards	PR27	P
☐	3.4	Monitor and evaluate the effect of conservation measures		N
☐	3.5	Document conservation measures		N
☐	3.6	Recommend appropriate sources of further analysis, treatment or preventive care where these lie outside your remit or area of expertise		N

If you click on any of the blue hyperlinks, it will take you directly to the relevant project for that sub-standard.

RESOURCES ON ONEFILE

The 'resources' section on OneFile can be located by clicking 'resources' in the black menu to the left of the screen.

In the resources section you can find the ACR assessment criteria, Icon's assessment policies, the Plagiarism, Collusion and Cheating statement and this guide.



REVIEWING THE PORTFOLIO

When reviewing candidate's e-portfolio evidence – we recommend you make any notes offline initially (e.g. in a word document) and share this with your Specialist Advisor. Don't use the feedback box in the system – as this is only used for final post-assessment feedback at the end of the process.

When reviewing the information provided use the ACR Assessment Criteria and the VARCS principles as your guide. Ask yourself the following:

- Are there any standards you feel are fully met in the portfolio and don't need discussing further at discussion? (Standards that relate to record keeping and formal paperwork can often be successfully met at this stage.)
- Are there any standards that are partially met but require further discussion at the next stage? What are you looking for at the discussion stage to be fully satisfied?
- Are there any specific aspects of a project you would like to understand in more detail at the next stage?
- Are there any standards not addressed and require the candidate to make amendments to the portfolio before proceeding? (E.g. has a candidate completely misunderstood a standard?)

Once you have considered these questions, arrange a time to share thoughts with the Specialist Advisor. Are you in agreement? Remember: the Specialist Advisor may have strong feelings about any matters relating to material specialism. If you find yourself in disagreement with them, make sure you each provide a clear reasoning for your views and refer back to the VARCS principles and ACR Assessment criteria if necessary.

Use the meeting with the Specialist Advisor to determine which areas require further exploration in a half-day professional discussion. (There is no need for you to cover standards that have been fully met at portfolio stage.) The professional discussion should be used to focus on areas that require a more nuanced conversation– e.g. this could be testing the candidate's material knowledge, discussing ethical issues, getting candidates to justify treatment decisions etc. You may also wish to see a current project the candidate is working on or get them to give you a tour of their workspace.

Once you have decided on areas of questioning and requirements for discussion stage, EPAs provide an email with written feedback to the candidate to help them prepare. In this email you should discuss the following:

- Details of any amendments that are required to the portfolio (for instance if the candidate has mis-understood a sub-standard or has provided insufficient documentary evidence.) Candidates get one opportunity to correct the e-portfolio.
- Details of a few areas you would particularly like to explore further at discussion stage – e.g. specific treatment choices, ethical issues, material understanding etc. (Although you don't have to confine your discussion purely to these areas - so ensure candidates understand this!)
- Any other requirements you may have – e.g. do you wish to get a virtual or in-person tour of their workspace or view an object they are working on. (Only request this if it feels necessary.)
- Discuss arrangements for any reasonable adjustments that have been flagged.

SCHEDULING THE DISCUSSION

End-Point Assessors are responsible for scheduling a mutually convenient time for the assessment discussion. To ensure fairness, it is vital that all parties should be able to allocate sufficient time to the discussion and can talk freely without interruption or distraction. Be honest about your availability, only commit to timeslots that are practical for you and allow others to do the same. It is not fair to the candidate if assessors cannot give them their full, undivided attention during assessment.

We request that, under normal conditions, assessments take place within 6-8 weeks of portfolio review. If schedules really do not align and this is not possible, you can go beyond this time frame but please make the Icon Skills Team aware of any delays.

Discussions are digital by default, using platforms such as Zoom, Teams etc. However, if there is a clear reason why face-to-face is necessary – e.g. because reasonable adjustments deem it necessary or because assessors cannot understand candidate's work without a face-to-face meeting, the EPAs should discuss this directly with the Icon Skills Team.

DURING THE ASSESSMENT: PROFESSIONAL DISCUSSION STAGE

The assessment discussion typically lasts between 3 to 3.5 hours. Occasionally, if a candidate requires reasonable adjustments, the discussion can take place across several shorter meetings or candidates may be allowed extra time. Icon will inform you of any reasonable adjustments necessary prior to discussion.

ASSESSOR-LED AGENDA

Under the old ACR assessment system, the agenda for the assessment discussion was typically more **candidate led**. (Assessors were less familiar with the projects before assessment day and candidates would be required to give a contextual presentation for each project.)

Under the new system, assessors have already reviewed the e-portfolio and have a greater amount of contextual information on the projects. Furthermore, they may already be satisfied that the candidate is proficient in some areas. Consequently, the agenda for the assessment discussion is much more **assessor led**. You will already have agreed, prior to discussion, some areas you want to explore in more detail with the candidate, and you should have some questions prepared. There is no requirement for candidates to rehearse and produce presentations for each project at this stage.

A CONVERSATION BETWEEN PEERS

We aim for the professional discussion to be a friendly conversation between peers. It should not feel like a job interview or interrogation! We are trying to bring out the best in candidates and see what they know. We are not trying to catch them out. Consequently, be flexible in your approach. For instance, if a candidate remembers something and wants to circle back to a previous question, let them. If they want to quickly refer to their project documentation and double-check something before answering a question, that is acceptable.

Some candidates will offer information freely and the discussion will flow easily. Others may feel more nervous and wait to be asked. It's worth checking with candidates that there's nothing important they wish to add before moving the conversation in a different direction, particularly if you are not confident the evidence given thus far is sufficient.

As End Point Assessor, it is your responsibility to ensure all criteria are assessed either through portfolio, discussion or both before concluding the process.

RECORDING THE CONVERSATION

It's a good idea for assessors to record the conversation so they can refer back to it when deciding /reporting results. Most assessment discussions are online and held on platforms like Zoom, which have a 'record' feature. However, if you are meeting in person, you may find it helpful to record it on your mobile phone or use a Dictaphone. Sound recordings can be uploaded onto OneFile as assessment evidence with 'time-stamped' notes so moderators can refer to the relevant sections.

If you take written notes during the discussion, we request you hold onto these until after the candidate's result has been moderated by the Accreditation Moderation Committee.
(Moderators may occasionally come back to assessors at moderation stage to clarify information if something is not clear.)

Do not inform the candidate of the potential assessment results at discussion. Icon will inform the candidate once the report has been submitted.

AFTER ASSESSMENT

REPORTING RESULTS

After the discussion is completed, you will need to meet with your Specialist Advisor to discuss and agree results. Whilst the End-Point Assessor is responsible for writing the report, both assessors agree the overall assessment results. You should take guidance from your Specialist Advisor on any sub-standards that require their specialist knowledge. The meeting should be done as soon as possible after the discussion. Recording the meeting will enable you to capture the correct subject-specific terminology from your Specialist Advisor – making it easier for you to report on the decisions relating to material knowledge and the suitability / quality of conservation measures.

If further evidence is needed for a specific standard, assessors have the option of going back to a candidate and seeing if there's anything further they wish to submit for review. However, this approach is only recommended if a candidate has missed a small number of standards and could be considered a borderline pass if they can supply further evidence within a short timeframe. If a candidate is regarded to have failed across a wide variety of criteria, a future reassessment will almost certainly be needed.

A reporting template can be found in the appendix section of this guide. When reporting results, Assessors need to provide Icon with the following.

- **Overall summary of result.** (Has the candidate met all sub-standards at proficient level? If the candidate has not met all sub-standards, which ones have been missed?)
- **Feedback per sub-standard.**
For each sub-standard, following information is needed:
 1. What evidence was seen / discussed
 2. What is your assessment decision,
 3. What is the rationale for your assessment decision (why have they passed/failed that sub-standard?)

Icon has produced a template for reporting which we encourage End-Point assessors to use. It is also helpful to draft a few sentences of general feedback for each project as a topline summary.

Once the report is drafted, share a copy with your Specialist Advisor to ensure you are both in agreement with the contents.

If you are not in agreement with your Specialist Advisor regarding candidate results, discuss your reasoning with them in the first instance and see if you can reach a consensus. If, after this, you still cannot agree on the results, contact Icon for advice.

If you have taken written notes during the assessment process, you should retain copies of these until after the moderation process is complete.

Once both parties have approved the content of the assessment report, send it through to the Icon Skills Team who will upload the contents onto OneFile.

Icon will issue interim results to the candidate. But these are unofficial results pending the moderation process. Candidates are not awarded ACR status at this stage.

MODERATION

The role of the Moderation Committee is to undertake internal quality assurance for Icon accreditation assessments, ensuring the process has been carried out correctly and the assessment outcomes are fair, accurate and objective. The Committee meet three times a year to moderate new assessment reports, checking that there is a clear rationale for assessment decisions and that these decisions have been made with reference to the assessment criteria and the VARCS principles of assessment.

If moderators cannot find clear rationale for decision-making in an assessment report, they can request clarification from the assessment team. If, following this clarification, they still cannot see clear rationale behind assessment decisions, they can reject all or some of the assessment decisions, resulting in a candidate requiring reassessment.

FINAL RESULT

If moderators are satisfied with the rationale behind assessment decisions, the report is upheld, and final results are issued to candidates by Icon.

There are 3 possible outcomes for the candidate:

Pass: Clear evidence that the candidate has passed all sub-standards at proficient level. Candidate is awarded ACR status.

Discretionary Pass: Clear evidence that the candidate has passed 36 out of 37 sub-standards at 'proficient' level. The candidate has been deemed 'competent' in 1 remaining sub-standard from either standard 1, 2, 4 or 5. (The candidate cannot be deemed 'competent' in any sub-standard from Standard 3 or Standard 6.) The Moderation Committee is satisfied that the candidate is close to achieving proficiency in the remaining sub-standard. Candidate is awarded ACR status.

Requires reassessment: Clear evidence that the candidate has either failed multiple sub-standards or a single sub-standard from Standard 3 or 6. Candidate is not awarded ACR status and will be required to undertake either full or partial reassessment to gain ACR status in the future.

WHEN A CANDIDATE HAS NOT PASSED

Typically, when a candidate has not achieved ACR status at first attempt, they are required to do a partial reassessment. This means, they are only reassessed on standards they have missed. Hence partial reassessments are shorter and quicker for assessors and candidates. Candidates can choose to have the same assessors or opt for different ones. Candidates will be required to pay another fee for reassessment. The exact sum depends on the scale of the reassessment and the assessor time involved. Fees are as follows.

- Reassessment of Portfolio of Evidence only: £150

- Reassessment following Professional Discussion:
1 to 10 criteria: £200
11 to 20 criteria: £350
20 + criteria: £500

INVOICING ICON FOR FEES

Once the assessment report is complete and has been uploaded onto OneFile, you should invoice Icon for your assessor fee. For newly qualified assessors this will be £250 for the first assessment and then £550 for every assessment thereafter.

If your assessment discussion was in-person, rather than online, you can also claim travel expenses for mileage and petrol of 0.45p per mile (if using a car) or 2nd class travel (if using public transport). If you have to eat meals away from home, you can also claim up to £20.00 per day for subsistence. You must present electronic or paper VAT receipts for all travel and subsistence claims.

Claims are sent to our external finance team for processing and can take up to 14 days to appear in your bank account.

IF YOU HAVE PROBLEMS

ONEFILE ISSUES

If you need any refresher / update training on OneFile prior to assessment, contact the Icon Skills Team on accreditation@icon.org.uk at the earliest opportunity and we'll schedule a time to talk things through.

If you are locked out of OneFile and need a password reset, contact Icon Skills Team and we can do this for you. If it's urgent because there's an assessment looming, cc in Heather (heather.doyle@icon.org.uk) and/or Iulia (iulia.beres@icon.org.uk)

If OneFile is not working correctly for you, you can contact OneFile tech support at support@onefile.co.uk

CONCERNS ABOUT A CANDIDATE

Every assessment is different. Some candidates perform beyond expectations and their assessment is straightforward. With other candidates the process can be challenging or present unexpected problems.

Common issues that may occur include:

- **Candidate discloses a condition that entitles them to reasonable adjustments.**
Candidates are encouraged to disclose this to Icon prior to starting the assessment process. However, if a candidate discloses this during the assessment process, Assessors should pause proceedings and contact Icon for guidance.
- **Assessors review portfolio and agree candidate is not ready to proceed.**
The Icon Skills team do take pains to check portfolios are fit for purpose before engaging assessors. However, we are not Conservators ourselves and occasionally a candidate slips through who is not ready. When this occurs, the End-Point Assessor should contact Icon to discuss the issues, and Icon will advise the candidate accordingly.
- **Concerns about the authenticity of candidate's evidence.**
Fortunately, incidents where candidates deliberately try to mislead assessors are rare. However, vague language from candidates can make it unnecessarily confusing for the assessor. For instance, for those candidates used to working in tight-knit teams, phraseology like 'we did' rather than 'I did' can make it difficult to interpret which tasks were done by whom. In the first instance, you can raise this directly with the candidate and seek clarification. If you still have concerns following conversations with the candidate, contact Icon for guidance.
- **Tension between assessors and candidate.**
Whilst incidents of misconduct and malpractice in Icon assessments are mercifully rare, tension between candidate and assessors can be common. From a candidate's point of view, assessment is a nerve-wracking business and sometimes having others question one's decision-making and professionalism can feel intimidating and uncomfortable. A relaxed candidate generally performs better than a highly anxious one and many issues can be avoided simply by assessors taking time to put the candidate at ease at the outset.

Remember, if you have concerns about potential malpractice or maladministration by any stakeholder involved in the Icon accreditation process (including the Icon Skills Team), we have a Malpractice and Maladministration Policy in the 'resource' section of OneFile and at the Icon website at: Policies and Procedures. This document will advise you on appropriate next steps.

FINALLY

The information provided here may seem daunting at first, but don't worry! Most assessments go very smoothly and, as an ACR yourself, you will have an intuitive understanding of what good practice looks like in your field.

Icon could not run a successful accreditation programme without the dedication and passion of members such as yourself. We hope you find the role of End-Point Assessor to be a very satisfying and interesting one.

Thank you!

The Icon Skills Team.

The Institute of Conservation

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