



Online Registered Organisation Inspections: Information for panel members and Responsible Post-holders

The inspections usually begin at 10am and finish no later than 4pm. However, in certain circumstances, a later start or finish can be arranged. The inspection panels usually comprise 3-4 people including a CifA representative, a historic environment advisor and representatives from either a contracting organisation or consultancy. Snacks are provided by post (allergies cannot be catered for).

A draft agenda is outlined below to provide an idea of the timings for an inspection and also what is covered. Please note that the timings are subject to change dependant on the circumstances of the inspection and only provide a general indication. Each stage of the inspection is briefly explained to provide further detail. Additional information about the process can be found in the [Additional guidance for applying organisations](#) document.

Draft inspection agenda (This is flexible and can be changed to suit the organisation)

- 10.00 -11.30 Introductions and discussions about the organisation
- 11.30 – 12.30 Project talk through
- 12.30 – 13.00 Lunch
- 13.00 – 15.00 Review of documentation, talk to staff, site visit etc
- 15.00 – 15.30 Panel discussions
- 15.30 - 16.00 Discussions with RPH and summing up

Introductions and discussions

The inspection panel will usually have had a brief online meeting in the days before the inspection to discuss the application form and supporting documents.

The RPH is asked to introduce the organisation and the organisational structure and then the panel members proceed to discuss different aspects of the form with the RPH in order to gain a better understanding of the organisation being inspected. This is focused specifically on understanding the people employed by the organisation, the processes and procedures that are in place at the organisation and the final end product that is produced by the organisation. The panel members have the opportunity to ask for any specific clarification or to discuss any aspects of the form that particularly interest them.

Project talk through

The RPH is asked prior to the inspection, to nominate a member of staff to talk the panel members through a project of their choice from start to finish. This is basically to achieve an understanding of the quality assurance processes in place and to understand and assess the procedures that the organisation goes through at different stages in a project.

Review of reports/documentation

The RPH is asked to provide a selection of reports (grey literature and/or published reports/articles/monographs/books etc.) for the panel members to review. Usually the reports will already have been reviewed in advance of the inspection day by the panel. It is also requested that any documentation not provided with the form are provided on the day. These can be viewed digitally by email or screen sharing.

Office tour/speak to staff

A tour of the organisation's office can happen at the beginning of the day or whenever it is most convenient for the RPH and the staff members. The panel members are usually introduced to staff during the office tour but then will also speak to them individually or as a group later without the RPH present. The role of the panel and the inspection process is explained and they are asked general questions related to their role, training and CPD opportunities etc. The office tour can be conducted using a helmet camera, phone, or other technology. Staff can join the online platform when requested.

Site visit (if applicable)

Organisations that conduct fieldwork will also require a site visit. This can be undertaken either on the day of the inspection or before or after the inspection. If the site visit is to be undertaken on the day, a helmet camera or similar, may be the most appropriate technology. For those visits conducted on a different day, ClfA will liaise with the RPH. Visits may then be conducted by a local historic environment adviser or another ClfA member (either in person or remotely).

Further discussions and summing up

At the end of the inspection the panel members discuss the day without the RPH present. They outline those aspects that impressed and those that potentially caused some concern or warranted some further clarification. The RPH is then invited to join the discussions for the final summing up which includes outlining all the positive and potentially negative points identified by the panel members. The RPH is then given the opportunity to ask questions and provide feedback regarding the RO scheme and overall inspection process.

Post-inspection report

After the inspection has taken place, the ClfA representative compiles the inspection report which outlines the day and a summary of the discussions. This report is first circulated to the panel members to check and to provide comments or feedback. The report is then sent to the RPH for comment and feedback. Once this process is complete the report is presented to the next available quarterly Registration Committee (Organisations) meeting by the ClfA representative for review.