



GUIDELINES FOR CONSERVATION REPORTS

INTRODUCTION

The importance and complexity of historic furnishings and works of art in churches is reflected in the amount and type of information required in conservation reports. A conservation report is an essential tool in the management of cultural property as it informs the decision-making process for repairing and preserving objects. The report is also a permanent record, which should be kept in the church archive together with any relevant specialist and post-conservation reports, as it will inform the lifetime of the object and building.

SCOPE

These guidelines cover the minimum information required in conservation reports accompanying faculty and grant applications. They are applicable to most church furnishings, in particular monuments, timberwork, textiles, wall paintings, paintings on canvas or wood (including hatchments) polychromy, metalwork, church plate and stained glass. For stained glass the conservator is encouraged to use the CVMA system to identify windows. The principles behind the guidelines are also appropriate for musical and mechanical furnishings including bells and clocks; separate guidelines for organ builders (agreed with the Institute of British Organ Building) are also available.

Further advice may be sought from this Division including sources of grant aid for the preparation of these conservation reports.

THE ROLE OF CONSERVATORS WORKING IN HISTORIC CHURCHES

The role of the conservator working in historic churches is wider than is often the case for museums and collections. The conservation of the object needs to be considered in the context of the historic church building and should address preventive conservation issues, as well as conservation treatment. This will almost always include giving advice on how the condition and use of the building are affecting the deterioration of the object and the measures which should be taken to prevent future deterioration. Therefore, the conservator will be expected to liaise with those responsible for the management of the building (generally the PCC) and those professionals involved with the repair and conservation of the fabric (generally the inspecting architect and/or surveyor).

PURPOSE AND USES OF CONSERVATION REPORTS

A conservation report consists of a dated and authored record of descriptive information on the state of preservation of an object of historic, artistic or social significance. The detailed understanding of the condition of an object, together with the causes of its deterioration, is fundamental to assist the decision-making process and planning of conservation projects.

The first use of the report is to inform the parish (or any other client) on the condition of the object, the causes of its deterioration and the necessary steps to ensure its sustainable

preservation. The most common use for reports is to support faculty and/or grant applications. In this case, reports will also inform the church authorities and/or funding organisations of the appropriateness of the proposed treatments in view of the object's condition. Therefore, reports must provide a detailed description of the object's condition, analyse the causes of deterioration and explain why it is necessary to embark on a conservation programme. It must be noted that the assessment of faculty and/or grant applications may be based solely on the information provided in reports (without involving a site visit or discussion with the conservator) and consequently these documents must be clear and informative.

Although a conservation report is not in itself a specification document, and therefore should not be used as a tender, the parish may use it to inform tendering exercises. Conservators should therefore discuss the possible uses of reports with their clients and structure them in such a way that they provide all required information and also ensure that the commercial process remains fair and transparent (for example, the estimate section may be provided separately).

ESSENTIAL INFORMATION TO BE INCLUDED IN THE REPORT

The following headings show the minimum information required in a report. Reports should not be limited to this information and conservators are encouraged to include all relevant knowledge:

- **Brief summary** detailing key information from each section of the report.
- **Project brief** detailing scope and intention of the report, the conservator(s) who undertook the investigation, the circumstances of examination (including access), the author(s), date of visit(s), the persons responsible for the object and building (including the architect).
- **Description and history of the building**, including name of parish, dedication of church, diocese and county. This should also include a brief description of the building, including plan, date(s) of construction phase(s) and materials, and major interventions that may be relevant to the object.

Description, history and significance of the object(s)

- Name and date of object
- Location within the church (this should be given on a building plan with context photographs), overall dimensions, and method of installation. If the object is not on permanent display please describe the nature and conditions of storage and use.
- **General description:** to include original materials, details of construction, surface treatments, inscriptions, etc. In the case of church plate you should also include details of hallmarks (church plate may come under the protection of The Hallmarking Act (1973) and an Assay Office has to be informed of proposed treatments).
- **Physical history of the object**, including previous interventions. Ideally, this should be based on previous documents as well as circumstantial evidence. Original and restored elements should be clearly differentiated. References to the sources of information used should be given.
- **Assessment of the significance associated with the object**, such as historical, art historical, social, etc. This significance may be local, regional, national or international. This assessment should be substantiated and referenced and members of the parish may be able to help. In the case of monuments, parishes should try to trace the descendants, seek agreement to the proposals and maybe contributions towards the cost of conservation.

- The Cathedral and Church Buildings Division's library holds information on churches and their contents as well as conservation records of past treatments. The library is open to the public for consultation (by appointment only) and those preparing conservation reports are encouraged to consult this archive.

Condition assessment

- **Condition of the object(s):** An adequate condition survey should be provided, with descriptions of the different types of deterioration, and with an assessment of the risk of the loss. These should be recorded photographically and graphically as appropriate. It is of particular importance that an assessment is made of whether the deterioration is *ongoing* or *historical*. This should be based on the present condition of the object and the history of interventions to both the object and the fabric of the church. State the nature of the examination undertaken (e.g. day or artificial light, under magnification, whether a scaffold or ladder was used, etc), and whether any diagnostic investigations, sampling and analysis were carried out.
- **Condition of the building and impacts to the object(s):** Analysis of the building environment with summary of the heating, ventilation, and, as appropriate, rainwater disposal systems, and their condition and normal use. This should incorporate advice from the church's inspecting architect and reference must be made to the recommendations in the latest quinquennial inspection report (available from the parish).
- **Analyse of the causes of deterioration** which will typically include environmental factors such as heating, maintenance of fabric, rainwater goods and site (or perimeter) drainage. Adequate understanding of the causes of deterioration – and proposals as to how they might be addressed to ensure the long-term preservation of the object – may require environmental monitoring and/or other studies by an expert. If so, you will need to provide an interpretation of this evidence in relation to the physical history of the object and building. If this is not possible, indicate what further investigations are required. If the causes of deterioration are related to the building envelope, the internal environment, or the use of the building, what measures are being taken by the parish and/or its architect to address them?

Recommendation for conservation

- **Preventive recommendations:** most deterioration of objects in churches has been caused by a combination of inappropriate treatments, poor management and care regimes and adverse environmental factors. Consequently, the emphasis on conservation is now on preventative and passive treatments to limit the deterioration that occurs daily and over time.
- **Proposals relating to the building, its use and environment** should be given. Assess what interval (if any) should elapse between the completion of this work and the start of the proposed conservation.
- If you consider that **emergency stabilisation work** is required, explain why and indicate the extent, time-scale, the materials and methods proposed.
- **Treatments** should be presented, justified and prioritised. If relevant, they should be based on small-scale and discrete treatment trials. Details should be given as far as possible concerning the materials (you should provide both the chemical composition of the material and its commercial name) and methods proposed, and the rationale for their selection. Indicate if there are any alternatives to the recommendations (type of interventions, materials and methods) and explain why the proposed course is the most suitable. Upon completion of

works, a separate report on the treatment(s) undertaken should be prepared (guidelines for post-conservation treatment reports are also available).

- Provide details and results of any **treatment tests**, including adequate photographic documentation.
- Indicate any significant **ethical or practical issues** relevant to this case.
- **Future recommended conservation requirements and/or maintenance**: describe what, if any, additional steps you recommend should be taken following completion of conservation and indicate the nature and frequency of post-conservation monitoring and/or maintenance required.

Estimate

- Describe what **preliminaries** and **attendance** you would require the parish to provide for your work, e.g. scaffolding, electricity, the architect, a builder, etc.
- State the **time and cost** for carrying out the above work, the qualifications, experience and **accreditation** status of the lead conservator and the **insurance** cover provided. If a phased programme is envisaged show estimates for the phases separately. All on-site costs such as materials, accommodation, and travel should be included. Ensure the estimated cost includes the time to produce the **record of conservation** work.
- Indicate **VAT** as a separate item and state terms of payment and **duration of validity** of the estimate.

Sources and appendices

- Provide a list of all sources of information, including historic photographs. Full records of sampling, analysis, diagnostic investigations, monitoring, etc, should be appended.

Illustrations and electronic files

- The report must include good quality colour **photographs**. These should be printed on photographic paper, either through chemical laboratory processing or professional printing of digital images (desktop or laser printers are not acceptable as they do not have the required archival qualities). **Digital images** in JPEG or TIFF formats should also be saved on a CD, attached to the report. Files should be at a resolution of no less than 300 dpi at A5. All photographs should be labelled, dated and the type of film and/or paper identified with its commercial name. The name of the **copyright** holder should be clearly stated in all photographs.
- In addition to the hard copy, the report should also be **filed electronically** in PDF/A (PDF / Archive) format. Although both PDF/A-1a and PDF/A-1b levels of conformance are acceptable, the former is preferable.

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